Conduct a Study on the Demand for Specialty Foods in CARIFORUM Market

Submitted to:

Caribbean Export Development Agency

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Contents

1. Background

Caribbean Export commissioned a Study on the demand for a selection of specialty food items within the CARIFORUM region. This Project is part of Caribbean Export's continuing efforts under the CARTFund Programme to expedite the Regional Specialty Foods Sector Strategy and Action Plan developed in 2012, which would have defined certain priority actions in consultation with the stakeholders.

Throughout CARIFORUM there are clusters of well reputed, high quality, well branded products produced which can be well positioned to dominate regional market share in key priority areas. These clusters are low volume producers well pegged to service the regional market area in the Specialty Food category which includes: Wellness, Indulgence, Ethnicity, Value and Convenience Foods.

The selected countries were:

Antigua and Barbuda
Barbados
Saint Lucia
Trinidad and Tobago
The Bahamas.

From previous studies and analysis, Caribbean Export identified the following specialty foods:

Sauces: Pepper Sauces, Pepper Jellies, Chutneys, Jerk sauces, Marinades
Bakery Products: Rum Cakes and similar baked goods
Condiments: Jams, Jellies, Fruit Butters and Cheeses, Indigenous Confectionery Pepper Wines, Dried pepper
Beverages: Fruit Juices and Concentrates, Bottled Coconut Water
Hot Beverages: Coffee and Herbal teas
Coconut Oil
Crackers and Biscuits
Gluten Free Breads/Pancake/Waffle Mixes
Sweeteners (Sugar, Honey)

The study identifies the food distribution system across:

Agro Tourism Sector
Restaurants
Hotels
Institutional food Service Providers
Retail Grocers
Specialty Shops

The objective is to increase the awareness of specialty food exporters of market opportunities through the analysis of the retail and food service sector across the selected CARIFORUM countries, through examination and analysis in the following critical study areas:

- Market demand to include import regulations, food safety requirements, packaging and technical and regulatory requirements
- Assessment of CARIFORUM exporters and importers in the target countries. This will be presented in a fully searchable functional database to include ranking of lead manufacturers.
- Value chain analysis for each country for the specialty food identified. The analysis includes risk assessment, the marketing channels and their changing nature; the role of importers/agents, wholesalers and supermarkets; importers of semi processed or raw materials (agriculture) products for agro processing.
- Market segmentation analysis determining opportunities for:
  - Retail/Food service
  - Market size and demand
  - Income and price elasticity
  - Consumer perceptions towards products to include user preferences in flavor, taste, texture and shelf life.
  - Product packaging, labeling and other regulatory requirements for each of the identified countries.
  - Pricing matrixes to include trading terms and recommended price points for sustainable exports.
  - Competitor analysis
  - Export potential and value of market opportunities for each segment.
  - Tariff and non-tariff barriers affecting the market.
  - Competitor analysis and positioning strategy for CARICOM exporters.
  - Ranking of market segments in order of priority by country product offering and type of consumer.
- Recommendations based on benefits and economies of scale why a local producer should focus on saturating the home and regional markets to capture that revenue prior to looking the US and EU markets where the cost to enter is exorbitant.
- Provide a comprehensive database of the key importers in the selected five countries and key manufacturers in CARIFORUM.

Visions and Concepts captured data that demonstrates the price ranges from product, quality, packaging, examine consumer preferences on consistency of the product being supplied in the market personal flavor, taste and texture and from a production side the shelf life. This is coupled with pricing information at the wholesale and retail level, sales terms, competition in the market both domestic and internationally, and the future growth/opportunities of each segment.

The report highlights:

- The barriers to market such as the regulatory environment of each of the five markets, tariffs and non-tariff barriers for market entry and other bottlenecks that exist along the export value chain.
- The marketing channels to understand the role, and a value chain analysis.
- The role of importers/agents, wholesalers and supermarkets; importers of semi processed or raw materials (agriculture) products for agro processing.

- Identifying the pathway to and hindrances to market to establish best practice for regional economic growth.

Specialty food products, include Wellness, Indulgence, Ethnicity, Value and Convenience foods and therefore a range of products that are not very price sensitive, do not require mass production, and are suited for production by the micro, small and medium sized enterprises which constitute the majority of enterprises in the industry. In 2014, sales in specialty food products was USD88 billion, and has recorded an 8% annualized growth and 18.4% growth course since 2011, according to the New York-based Specialty Food Association.

1.1. Study Rationale

The Caribbean has been participating in this industry for over 25 years, with products exported both within the Caribbean and extra-regionally, though the domestic market continues to be the most important. There are approximately 300 commercial micro, small, medium and/or large specialty food enterprises within the 15 CARIFORUM states. According to International Trade Center Trade map data the Caribbean specialty food industry has been exhibiting positive signs of growth over the last three years with average estimated growth of 5 % for the Dominican Republic, 9% for Jamaica, 21% for Trinidad and Tobago, and 52% for Saint Lucia. Products from the region are also receiving significant attention in major international trade shows. Despite these positive trends, Caribbean specialty products have not achieved significant market shares in the US and EU markets. In addition, although the Caribbean specialty food industry is dominated by women owned and/or managed micro and small enterprises, these enterprises are less likely than men owned and/or managed enterprises, to be export-ready.

Among the key challenges Caribbean enterprises currently face, is a lack of exposure to access requirements for key export markets; difficulties with accessing new marketing channels and networks in order to expand beyond diaspora markets; and the cost of sustained participation in international food shows that provide the required market apprenticeship. In April 2014, CDB conducted an electronic survey on the needs of specialty foods enterprises as an update to the Sector Study that informed the Regional Specialty Food Industry and Action Plan. The April 2014 survey identified the current top 10 challenges faced to expanding exports, namely:

a. Limited access to specific information on the demand for specialty food products in Caribbean Markets;
b. Absence of a dedicated service to assist Caribbean exporters with sales and distribution in the EU market;
c. Inadequate information on the market access requirements for Caribbean markets;
d. Absence of a dedicated service to assist Caribbean exporters with sales and distribution;
e. Inadequate access to technical advice and training to improve food safety compliance;
f. Technical advice and training on formulating new products to expand existing product range;
g. Inadequate access to assistance with preparing business/operating plans to improve operating efficiency, expanding operations and/or accessing credit;
h. Inadequate access to information on the market access requirements for the market

Despite these challenges, specialist advised the economic potential of the Caribbean foods industry, particularly for small and medium-sized enterprises (SMEs), is largely untapped and that this potential could be realized if the above challenges are addressed.

1.2. Executive Summary

The Visions & Concepts team visited the five selected countries (Antigua, St. Lucia, Barbados, Trinidad & Tobago and The Bahamas to conduct in-store consumer surveys, meet with distributors/importers, meet with supermarket managers, visit tourist stores and hoteliers, and meet with regulatory agencies as part of the field research required to complete the study. In addition secondary research was conducted for import data and other relevant facts pertinent to the study.

There is significant interest in local and regional food products but it appears that the shoppers did not feel that they have enough choices in terms of these products.

The total market share in the selected study countries and within the selected study categories is valued at USD 237 million dollars, this does not included the locally produced and consumed in-country products. The data excludes local produced and consumed. In large producing countries such as Trinidad and St. Lucia the market size is significantly greater. For example, the sauce market is valued at $32 million, this clearly doesn't included the sauces that Baron's produces in St. Lucia that are consumed there.

Sauces	Crackers Biscuits Bakery Products	Jam	Dried Peppers	Juice	Coffee	Instant Coffee	Tea	Coconut Oil	Gluten Free	Sugar Raw	Syrup	Molasses - Imports	Honey	Total
32,762	79,749	2,930	1,002	60,718	5,027	1,983	4,709	18	8,802	23,845	996	11,047	834	234,422
Denotes $1,000 USD														

*** Coconut water is included in the juice number as there is no HC code for coconut water**

2. Regulatory and Trade Agreements

2.1. The CARICOM Single Market and Economy (CSME)

In the Grande Anse Declaration and Work Programme for the Advancement of the Integration Movement, Heads of Government expressed their determination to work toward establishing a single market and economy.

The CARICOM Single Market and Economy is intended to benefit the people of the Region by providing more and better opportunities to produce and sell our goods and services and to attract investment. It will create one large market among the participating member states.

The main objectives of the CSME are: full use of labor (full employment) and full exploitation of the other factors of production (natural resources and capital); competitive production leading to greater variety and quantity of products and services to trade with other countries. It is expected that these objectives will in turn provide improved standards of living and work and sustained economic development.

Key elements of the Single Market and Economy include:

- Free movement of goods and services - through measures such as eliminating all barriers to intra-regional movement and harmonizing standards to ensure acceptability of goods and services traded;
- Right of Establishment - to permit the establishment of CARICOM owned businesses in any Member State without restrictions;
- A Common External Tariff - a rate of duty applied by all Members of the Market to a product imported from a country which is not a member of the market;
- Free circulation - free movement of goods imported from extra regional sources which would require collection of taxes at first point of entry into the Region and the provision for sharing of collected customs revenue;
- Free movement of Capital - through measures such as eliminating foreign exchange controls, convertibility of currencies (or a common currency) and integrated capital market, such as a regional stock exchange;
- A Common trade policy - agreement among the members on matters related to internal and international trade and a coordinated external trade policy negotiated on a joint basis;
- Free movement of labor - through measures such as removing all obstacles to intra-regional movement of skills, labor and travel, harmonizing social services (education, health, etc.), providing for the transfer of social security benefits and establishing common standards and measures for accreditation and equivalency.

2.2. Other measures:

Harmonization of Laws: such as the harmonization of company, intellectual property and other laws.

There are also a number of economic, fiscal and monetary measures and policies which are also important to support the proper functioning of the CSME.

Only slightly more than half of the members appear to have implemented the CARICOM common external tariff (CET) whereby goods entering any member country from nonmember countries will be assessed with the same tariff rate. Consequently, a wide range of applied tariff rates continue to exist across member countries.

2.3. Article 164

Article 164, similar to Article 56, was included in the Revised Treaty of Chaguaramas that protects the OECS countries on a set list of products from CARIFORUM as well as the global markets through tariffs. These tariffs are reviewable every 5 years. A product on the list does not necessarily mean it is protect, it gives the option of the country to add tariffs if desired. The products currently excluded from intra-CARICOM Free trade Under Article 164 for the Study Group.

Goods originating from the OECS or CARICOM Fresh, frozen or chilled fish (HS 03.01-03.04); smoked fish (HS 0305.41.00 - 0305.49.90); crustaceans and molluscs fresh, chilled, frozen or salted etc. (HS 03.06-03.07); fresh milk, not including UHT milk (HS 0401.10.00); rice (HS 10.06); wheat flour (HS 1101.00); chicken patties (HS 1602.32.00); beef patties (HS 1602.50.90); prepared or preserved fish (burgers, fingers and patties) (HS 16.04); cane and beet sugar (HS 17.01); ice cream (HS 2105.00.10); concrete blocks (HS 6810.11.00); and domestic and commercial meters for measuring volumes of water (HS 9028.20.00). https://www.wto.org/english/tratop_e/tpr_e/s299-04_e.pdf

For Antigua, aerated beverages, beer, stout, ale, porter, pasta, candles, solar water heaters, oxygen in cylinder, carbon dioxide in cylinder, acetylene in cylinder, chairs and other seats of wood and upholstered fabric, other furniture of wood and upholstered fabric, mops); imports of animals, poultry, livestock, and poultry products; plants and plant products; pesticides; drugs and antibiotics; firearms, fireworks, arms and ammunition; and chemicals controlled by the Montreal Protocol). For all other products, licenses are granted on request. The import licensing regime is administered by the Ministry of Finance and the Economy. https://www.wto.org/english/tratop_e/tpr_e/s299-00_e.pdf

2.4. HACCP

HACCP (Hazard Analysis Critical Control Point systems are the new industry standard for food safety. Food products not produced under a HACCP system are refused entry into several major markets. In addition, large food retailers and food service chains worldwide demand that their suppliers produce food under independently verified HACCP systems.

HACCP is a preventive system of hazard control rather than a reactive one. This system was developed to ensure food safety and the use of good manufacturing practices in the business place. It assures and guarantees a level of food safety to the end consumer and can be used as a tool to ensure safe production procedures, as well as to ensure efficiency and high productivity yields.

The European Union now requires all food products produced by or imported by member nations be processed under adequate HACCP systems. The US Food and Drug Administration (FDA) requires all seafood imported into the USA to be processed under a verified HACCP system. The US Department of Agriculture (USDA) has adopted a similar requirement for meat and poultry products. Canada and several other major markets are also working on HACCP legislation for domestic and imported products.

No countries within CARIFORUM require that products are HACCP certified and therefore HACCP certification is not an entry requirement. Good Manufacturing Practices (GMP) is the standard requirement. In all countries in the study area, there are National Standards Bureaus or The Department of Health responsible for monitoring and certifying manufacturing plants to this standard. All regional importing CARIFORUM countries will accept this standard certificate. The most important element in the GMP process is the ability to trace and recall products.

Antigua is the only country noted where local producers are not monitored for compliance on standard certification process, procedures and compliance.

HACCP certification will be required for exports to the International marketplace.

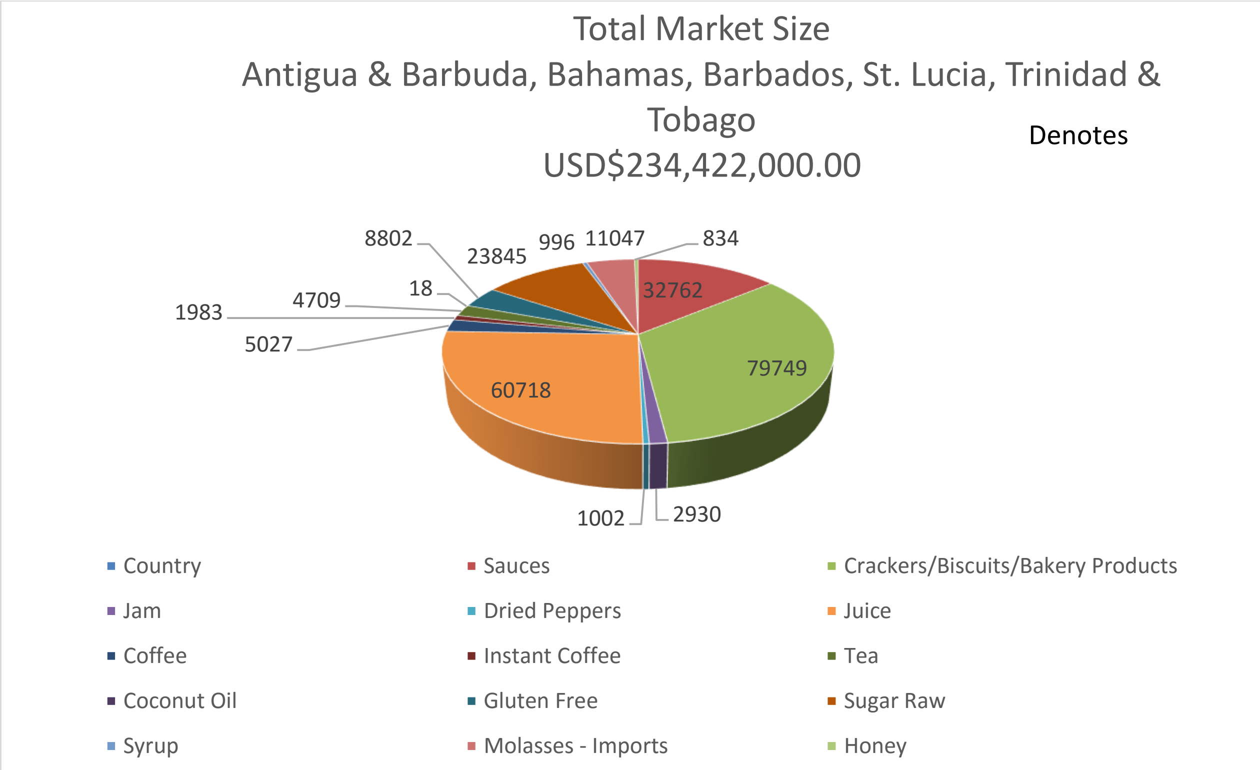
GMP procedures training and implementation is recommended for small producers beginning exports to the region.

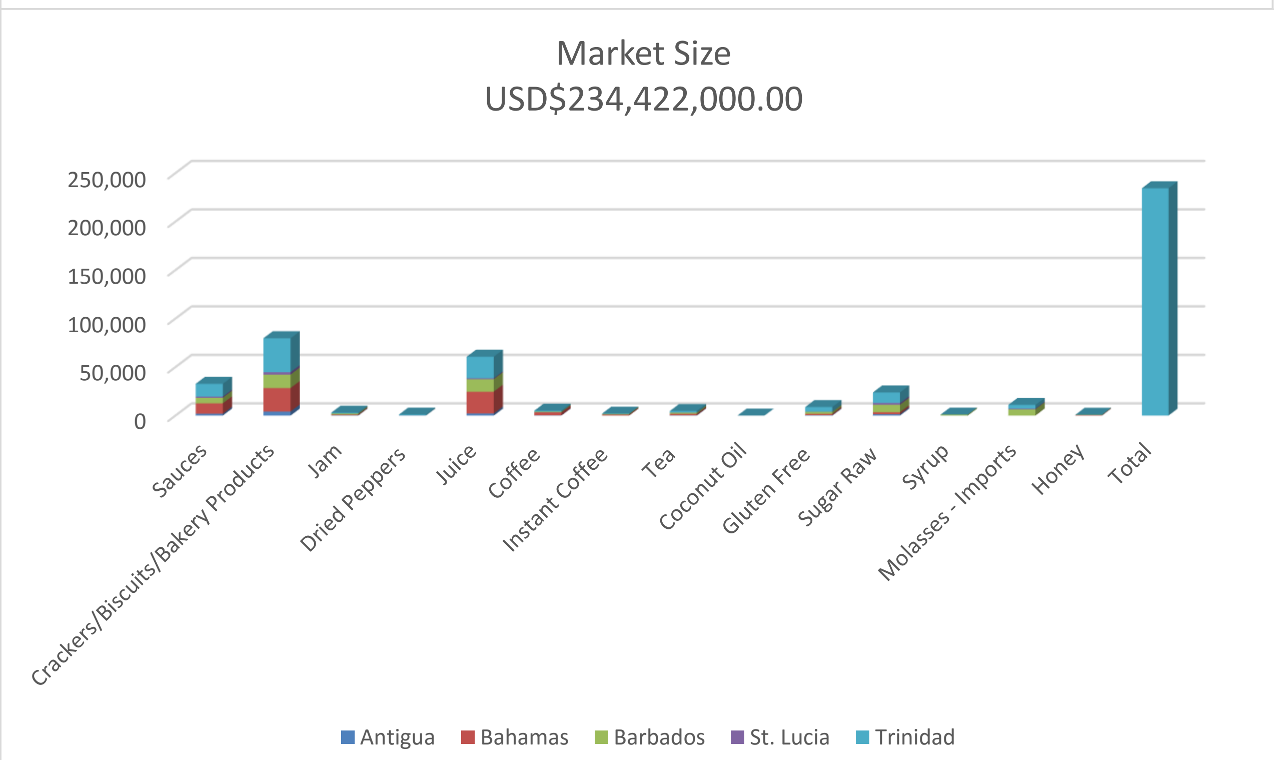
3. Regional Overview

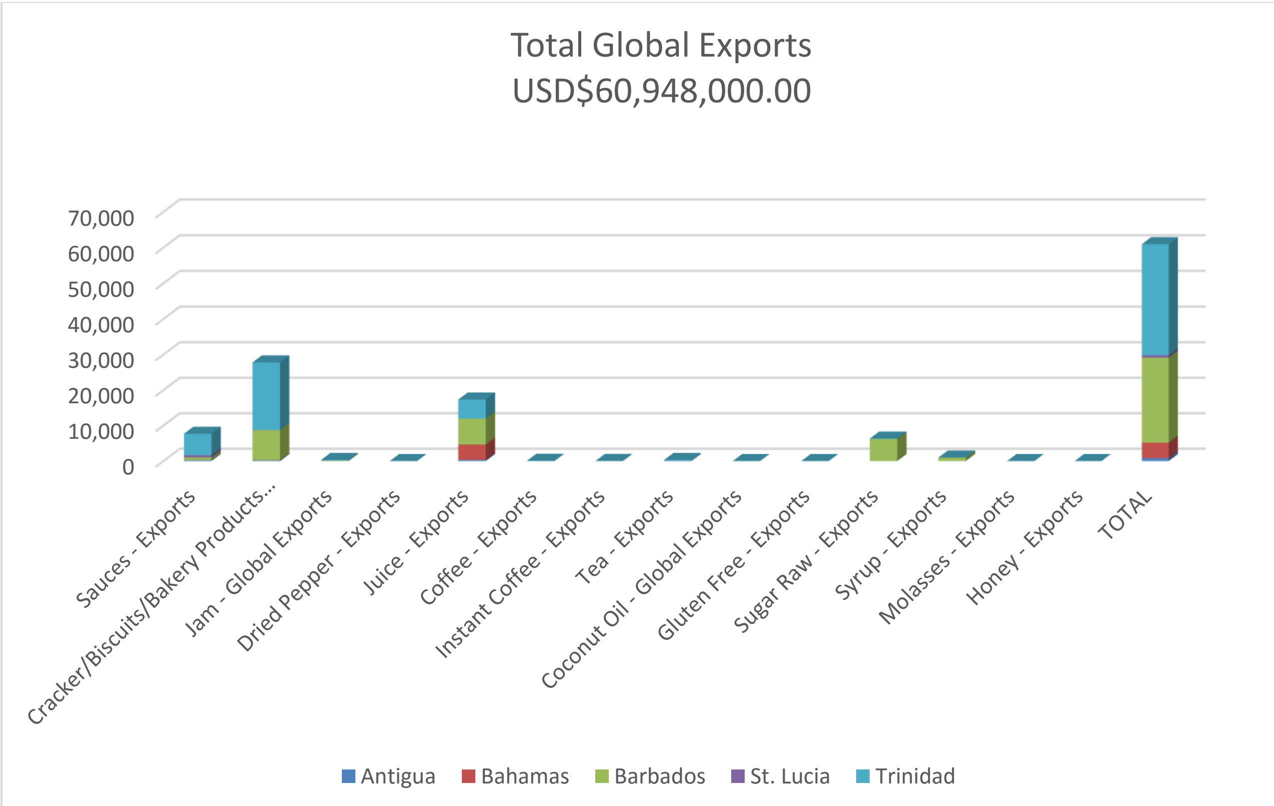
3.1. Summary

Total Market Size – USD $234,422M
Total Global Exports from Antigua & Barbuda, Bahamas, Barbados, St. Lucia, Trinidad & Tobago – USD$79,138M
Total Exports from Study Group to Study Group – USD$11,790M
Total Imports – USD$185,264M

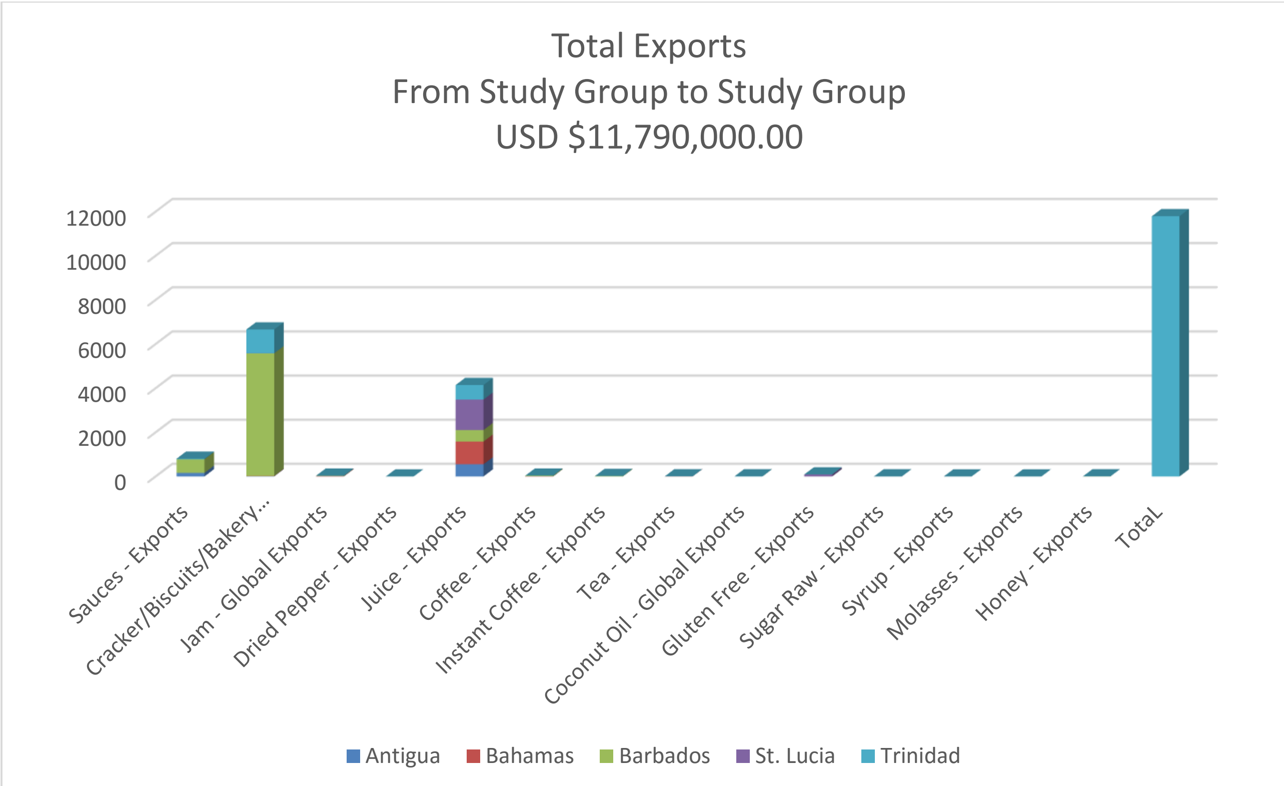
3.2. Market Share

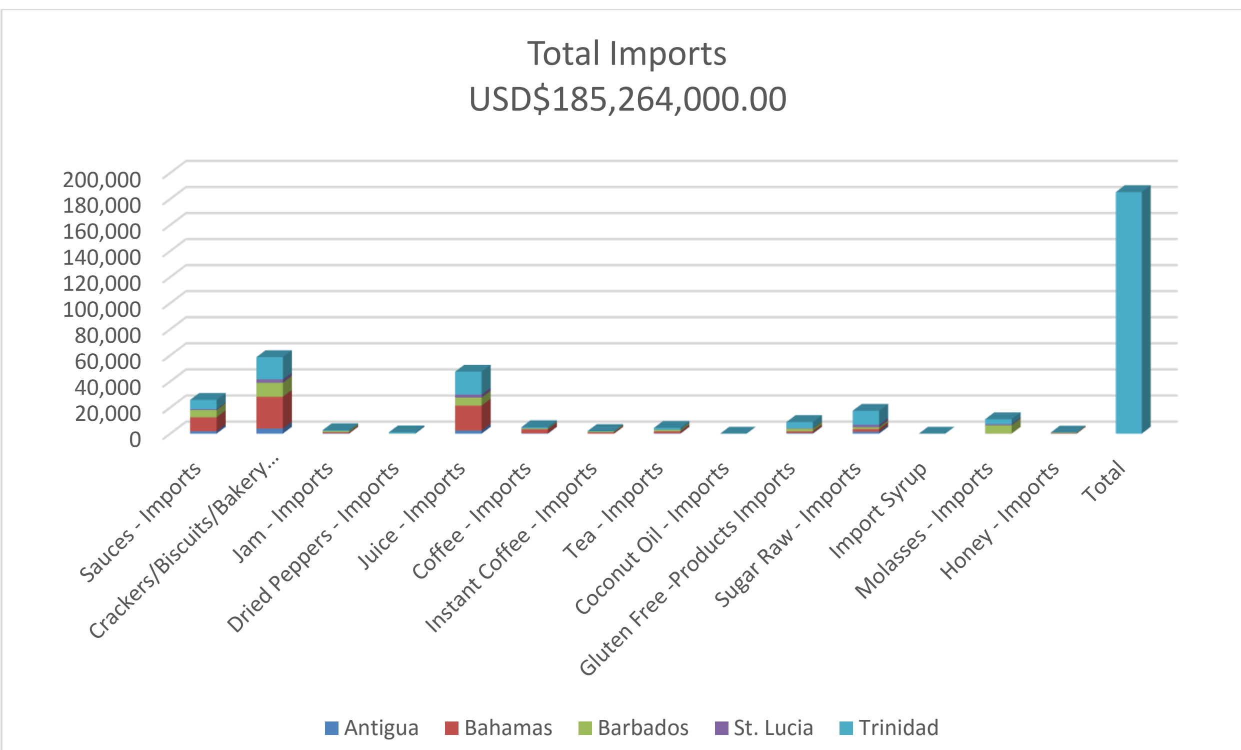






Total Global Exports
USD$60,948,000.00
70,000
60,000
50,000
40,000
30,000
20,000
10,000
0
Sauces - Exports
Cracker/Biscuits/Bakery Products...
Jam - Global Exports
Dried Pepper - Exports
Juice - Exports
Coffee - Exports
Instant Coffee - Exports
Tea - Exports
Coconut Oil - Global Exports
Gluten Free - Exports
Sugar Raw - Exports
Syrup - Exports
Molasses - Exports
Honey - Exports
TOTAL
Antigua
Bahamas
Barbados
St. Lucia
Trinidad


Total Exports
From Study Group to Study Group
USD $11,790,000.00
12000
10000
8000
6000
4000
2000
0
Sauces - Exports
Cracker/Biscuits/Bakery...
Jam - Global Exports
Dried Pepper - Exports
Juice - Exports
Coffee - Exports
Instant Coffee - Exports
Tea - Exports
Coconut Oil - Global Exports
Gluten Free - Exports
Sugar Raw - Exports
Syrup - Exports
Molasses - Exports
Honey - Exports
TotaL
Antigua
Bahamas
Barbados
St. Lucia
Trinidad


Total Imports
USD$185,264,000.00
200,000
180,000
160,000
140,000
120,000
100,000
80,000
60,000
40,000
20,000
0
Sauces - Imports
Crackers/Biscuits/Bakery...
Jam - Imports
Dried Peppers - Imports
Juice - Imports
Coffee - Imports
Instant Coffee - Imports
Tea - Imports
Coconut Oil - Imports
Gluten Free -Products Imports
Sugar Raw - Imports
Import Syrup
Molasses - Imports
Honey - Imports
Total
Antigua
Bahamas
Barbados
St. Lucia
Trinidad

3.3. Consumer Survey Summary

The consumer survey revealed some interesting results that support demand opportunities for local and Caribbean produced food products in the region. The respondents from each of the countries understand the importance of having local and Caribbean based food manufacturers. The respondents were somewhat satisfied with the range and variety of local and Caribbean food products available at the store where they were interviewed. The responses by country varied somewhat but the overall theme was that there is significant room for improvement with regard to availability of locally and Caribbean based food products.

The respondents, overall, indicated that they preferred the taste and flavor of local and Caribbean products over international brands. The respondents also believed that local and Caribbean products offer a better value than their competing international products. However, the local and Caribbean products lack in packaging and presentation when compared to international brands. This perception can be addressed with education and marketing support and make these local and Caribbean based products even more competitive with their international counterparts.

The respondents indicated that price is a consideration and range and variety of local and Caribbean products has some impact on where they shop. Given that the respondents consider these products to be a good value compared to international products it appears that pricing is not an issue as long as this perception continues. There is an opportunity for grocery stores to attract and retain new customers by including more local and Caribbean food products. This would provide one method of helping to differentiate themselves from competitors.

Local and Caribbean food manufacturers could benefit from some professional expertise in terms of packing, labeling and conveying food shelf life, where they were rated significantly lower than other product attributes like taste and flavor.

Generally, older consumers are seeking CARIFORUM goods. It appears that younger consumers are seeking international brands. In surveys taken with the students who were assisting in the project (25 students), they tend to gravitate towards international brands. This is so because they conceded that they are not tuned-in to local advertising and television. In fact, 99% said they do not watch any local television and are using more social media.

To remain competitive and to succeed with brand loyalty over generations, producers and manufacturers need to consider employing media strategies that will reach this population as they transition to major purchasers. Failure to do so could result in a loss of market share long term.

3.4. Importer/Distributor

3.4.1. Survey Results

The distributors are generally supportive of local and regional producers of specialty food products and are always seeking new lines of CARIFORUM produced goods. Their largest clients, retail stores, make up of 60%to 70% of their sales. The other 30% to 40% is concentrate depending on the distributor to smaller stores, restaurants or resorts/hotels.

Below is a summary of their purchasing patterns with respect to the study group: Price, Packaging and Quality are important components dictating purchasing preferences.

Study Products	Will purchase Locally	Will purchase Regionally	Will purchase Internationally	Notes
Pepper sauces, pepper jellies, chutneys, jerk sauces & marinades	80%	10%	10%	Pepper sauce market is saturated. Need new exotic infused flavors
Rum Cakes, baked goods such as bread, pastries	80%	10%	10%	Mostly local bakeries dominate this segment. Packaged rum cakes perform well in tourist boutiques.
Jams, jellies, fruit butters and cheeses, indigenous confectionery pepper wines, dried pepper	30%	30%	40%	Most local products although preferred by locals are poorly packaged and not priced competitively. There is stiff competition coming from the international marketplace. Packaging adaptation recommended.
Fruit juices and concentrates, bottled coconut water	5% 85%	70% 10%	25% 5%	Coconut water is a hard sell regionally. Consumers want fresh coconut water
Coffee & Herbal Teas	5%	10%	85%	Nescafe instant coffee dominating the market. Buyers are seeking new sources of coffee and hot chocolate. Herbal Teas with good packaging.
Coconut Oil (incl virgin)	30%	65%	5%	Increasing demand buyers are seeking new sources of Coconut Oil
Crackers and biscuits, cookies	45%	45%	10%	Basic crackers and biscuits are well represented by regional brands. Other items within the category is bought to compliment the range and provide for more variety.
Gluten Free breads/pancake/waffle mixes		1%	99%	Soft convenience market, low volumes. Not a real market opportunity.
Sugar, Honey, Syrup	50%	40%	10%	Honey imports are restricted in most countries. Honey producers are disorganized and not reliable. Would sell more local honey if available and if it meets standards.

The largest obstacles consistently facing small local and regional food manufactures is having a consistent supply, of the highest quality of those products. In addition distributors and buyers believe there are grave disparities in pricing between local and regional goods compared to international goods. Due to CARICOM tariff arrangements, goods produced locally or regionally are imported duty free. International products are subject to import tariffs based on the item. Too often these concessions do not translate to lower prices on the shelf. The price disparity is more pronounced when the grocery stores go direct to the international manufactures and are able to undercut the local distributor prices and local manufacturing prices.

While there have been great strides in branding and packaging, as recently seen with CRIX, other producers need to match or exceed the competition both regionally and internationally. This was supported by the consumer survey as well, that the taste and appearance were good, but the packaging infers a lower quality product and at times without a price differential to support it.

Furthermore, the distributors mentioned the difficulties in securing a marketing budget for local and regional producers to launch and maintain a presence for a product in retail sector. With a large regional brand and small/large international brand this is accepted at face value and understood to be a normal operating procedure. Typically, buyers expect a minimum budget of 10% of sales for marketing costs. This includes, product launch, tastings and samples, slotting fees, gondola end rentals etc. Buyers believe that often, smaller producers do not consider these additional expenses and therefore the products fail in the marketplace. Most will not undertake distribution arrangements without a budget allocation for these necessary expenses.

One of the largest issues for distributors across all countries, but especially Antigua & Barbuda and St. Lucia, is shipping products from the time it takes to assemble an order, have it delivered to the port, placing the container on the ship, the number of days on the water, more time waiting for container to logistically move through the port and/or clear customs. These issues increase the burden of moving local goods through CARIFORM and at times can make shipping products from Miami a much easier proposition. Because of this, most distributors need to keep on hand two months' supply of inventory. Lead time for order is six to eight weeks.

A new issue that is confronting distributors is bulk packaging for buying clubs. Manufacturers have yet to modify their packaging to address this type of buying. Distributors are shrink-wrapping products, placing their own UPC labels on the product to gain access to these buying clubs. This needs to fall back to the manufacturer and they need to add value to these larger sizes with quality packaging to meet this emerging demand.

There was consensus that there is little demand in CARIFORUM currently for organic, fair trade and gluten free products and are viewed as niche markets.

Some distributors such as Massey and others, have quite elaborate private label branding arrangements. Private label could present a significant market opportunity for Regional producers which will reduce operational costs for packaging and marketing dollars.

Most importers require exclusivity arrangements. This means that they will be the sole importer of the item and will handle all internal distribution upon arrivals. Because of the smallness of the various island states, it is highly unlikely that there will be multiple distributors of the same brand. This occurs only when there are separate brands manufactured by the same producer. This allows a distributor to invest and build the brand jointly with a vested interest in its success.

Visiting sales staff of regional producers solicit buyer to secure orders and distribution arrangements. There are no trade shows that feature regionally produced goods. Buyers are enticed to attend International Trade shows such as AG Grocers, or the Food and Beverage Show in Miami or sector shows in Argentina, US, Peru, Columbia. Inward buying missions to these shows are sometimes arranged by the show organizers and often buyers are incentivized with airline tickets and other perks to attend and agree to matching meetings.

In some cases, countries are setting up trade offices in target markets. For example, Costa Rica has set up a trade office in Trinidad. The person is arranging meetings with buyers, assisting with government regulations and transit of goods.

Typically duties for European and US goods are 40%. While there is an expectation that local goods are priced 15% below the international price. In reality and in most cases there is no significant pricing differential between duty vs non duty products. The duty exemption that is supposed to create a price advantage is often not realized on the supermarket shelves at the consumer level. As a result, local products are not necessarily less expensive and look inferior to the international brands.

Distributor/Importer warehouses are subject to audits and compliance visits by the national organizations responsible for monitoring compliance in packaging, labelling, and traceability of products. Some standards bureaus visit warehouses to inspect for package and label compliance for new products that are entering the country. They will review the product and if it meets the standards the products will be allowed to be sold. Some items may be missing an item on the label that is not deemed unsafe to the population. In that case the company will be told to correct it on the next shipment or temporary labels will be affixed to the products.

Massy has purchased several entities in all study countries. In most cases there is a Massy Distribution arm, a wholesaling arm and a supermarket/retailing arm. Because of this, the collective purchasing power of Massy is vast. In Barbados the Massy stores have a monthly meeting to review products to purchase directly from manufactures. Local manufacturers are responsible for delivering the product to either the store or distribution center.

3.4.2. Distributor Expectations

A number of expectations for an import and distributor with each firm they represent is a guaranteed supply of products. The distributor needs a clear understanding of the production schedule and length of time it takes to fill an order for it to be fulfilled. Once the fulfillment schedule is determined these agreed schedules needs to be met. Not only the producer's reputation but the distributor reputation to properly serve its clients is on the line. Furthermore if customers are unable to find a company's product on the shelf they may switch to a competitor and stop by buying it all together.

Distributors typically maintain a 30 to 60 day inventory of product and payment terms depend on the distributor from as little as 30 days to as high as 60 days.

Packaged products in appropriate packaging and sizes for the market is an important factor. This may require a company on size for retail, a bulk pack for the shopping club stores, and a larger size for the food service industry.

Typical fees for the marketing channel are as follows:

Organization	Mark-Up Percentage
Broker	5%-15%
Distributor	22%-30%
Wholesaler	10%-20%

A distributor likes to work with a manufacturer on developing a marketing plan for the market using their wealth of knowledge about their customer and past experiences. Additionally a firm attempting to determine a marketing budget should use as a rule of thumb assess 10% of expected gross revenue**.** The marketing budget can comprise of free cases of product to the distributor and/or cash. It typically will be a mix of product and cash.

3.4.3. Food Service Industry

Producers need to have a detailed understanding of a distributor's client and those customers. Specifically in targeting the food service side of the business the producer has to understand how to create a product that meets the food sector's needs. The producer will have to determine how their products can fit into the food sectors business by:

- Having high quality products
- Having a target value proposition
- Differentiated brand imagery
- New, innovative products
- Identify and stay on top of the industry trends
- Training on how to use their product with in the industry

Specifically a producer will have:

- Producer must have knowledge of their customer's operations and how products will fit in to their offerings.
- How their products contribute to the quality and authenticity of the operators offering?
- How does their product fit into the new health conscious awareness found in the industry?

3.4.4. Trading Terms

Typically the standard is FOB thirty to sixty days

3.5. CARIFORUM Manufacturers Benchmarking

3.5.1. Coconut

3.5.1.1. Coconut Oil

Coconut Oil is seen is all shapes and sizes not necessarily consistent with standard cooking oil packaging. Mags appears to be the market leader in this category. There is an opportunity for this product category to grow in the traditional oil category within the niche and mass market category. Coconut oil demands a higher margin than traditional oil. The continued demand for this product indicates that consumers are willing to pay extra for the perceived health benefits of this product.
Imagine a Ginger Coconut Oil product.

Coconut Oil in the 500 mil size ranges from $2.20 to $3.65.

3.5.1.2. Coconut Milk

Coconut Milk is seen liquid and powder form. The preferred pack is featured in cans. The regional products are on par with international products on price and packaging.

Coconut Milk in the 50 ml size ranges in cost from $0.43 to $0.63 with a median cost of $0.55. In the 400 ml size it ranges from $1.40 to $2.02 with the median price of $1.49.

3.5.1.3. Coconut Water

Coconut water is an item that supermarkets carry for convenience purposes. They are slow sellers in most markets as traditionally consumers prefer fresh. Packaging and pricing are uniform and consistent in both regional and international brands.

Coconut Water while there was little on the shelf ranged from $1.82 to $2.36 for 500ml.

3.6. Chutney

Fruit based Chutney's are trending. Consumers are seeking unique flavors with fruit combinations. Regional producers are on par with the competition. Packaging and pricing will be critical to continue to grow this market share.

3.6.1. **Hot Beverages**

3.6.1.1. **Tea**

The tea market is flooded by international brands. Few regional producers are seen on the shelves in the herbal tea segment on the supermarket shelves. Regional artisanal teas made by small producers presented in gourmet packages are seen in tourist trap locations and gift shops.

Tea is sold is a variety of sizes with different price points. The price per gram can range from a low $0.01 for a ginger tea from Jamaica to $0.17 per gram for a tea from the United States

3.6.1.2. **Coffee**

The coffee market is dominated by instant coffee. Few regional products are present in the instant market category. Further artisanal, medium to high priced grounded coffee is available from the region. International products are the market leaders in this category. Currently regional producers do not have the competitve edge.

3.7. Gluten Free

Interesting gluten free products are seen coming from the Region. It would appear that these producers have not seen a market opportunity in this category and as such the packaging and labelling does not promote Gluten Free. While this is a low volume category, the inclusion of the wording Gluten Free on the packs could position the products in several areas within the supermarket. This would certainly result in increased sales.

3.7.1. Pancakes

Only international products were seen in this category. Supermarket shelves were filled with pancakes indicating that there is certainly a market opportunity. Regional producers can capitalize on this market share with the introduction of mixes using indigenous raw materials. Imagine a gluten free pancake made with breadfruit or coconut flour.

3.8. **Beverages**

3.8.1. Juice

The juice market is flooded with brands featuring standard flavors as well as traditional Caribbean exotic fruit flavors. Regional producers dominate the market with similar combinations. They are well packaged and well-priced positioned for all consumer segments.

Juice in the 250 ml size the median price is $0.47 while in the 16 oz. (473 ml) size is $1.99 to $2.45 depending on the brand. The price range for one liter of juice has a ranges from a low of $1.38 produced in Trinidad and a high of $5.70 from the United Kingdom. The average price is $2.34 for one liter.

3.8.2. **Other beverages**

Seamoss drinks are highly sought after by distributors and importers. Demand is high, supply is low. Market opportunities are prevalent. There are no international products in this category.

3.9. Sauces

3.9.1. Pepper Sauce

The pepper sauce market is highly saturated with products made locally, regionally and internationally. It is an extremely price sensitive category. The products from larger regional producers are on par with their international competitors. The products of smaller local producers lack appeal but attract the local consumers. Fruit infused pepper sauces were seen mostly from international brands.

The price range for pepper sauce for a 5 oz. bottle is from .86 per oz. in Trinidad to 3.99 per oz. in Antigua. The median price is $2.36 for a 5 oz. bottle. For a 150 ml the price range is $1.50 to $3.99.

3.9.2. **Jerk Sauces**

Jerk sauces enjoy full share of the market. There were no international products seen in this category. Products were packaged in standard bottles or in plastic buckets. The bottled product "look alike" each other. Diversification with package shape will differentiate brands to grow market share.

3.9.3. Sauces Other

The sauce market is quite extensive. There are a range of products available from local, regional and international brands. Larger regional producers produce a range of ketchups, green seasonings, browning, creole, onion, garlic, coconut and lemon grass. Banana ketchups were seen mostly in St. Lucia. Few have ventured into fruit flavored marinades. It was evident that regional producers have not ventured into sauces such as salsa, BBQ, chili and exotic curry sauces.

3.10. Biscuits & Crackers

This category is dominated equally by regional and international brands. The international brands offer more variety and wider ranges. In niche areas, Crix crackers is the brand leader. The gourmet cracker and biscuit category is dominated by the international brands. Regional brands are on par with international brands. International brands are offered to provide for a wider depth in product offerings.

3.11. Fruit Butters

For the most part, this product category is chaotic and disjointed. Small cottage producers are selling products that look and feel home made with poor branding and packaging. The store displays of these items are often scattered and unattractive. There are a few producers with well package, high quality items. The international competition is seen in the dried fruit segment.

3.12. Sweeteners

3.12.1. Syrups

The international products in this category are not consistent with international products in this category. International products are positioned for the pancake/sweetener category while regional products are positioned for the drink mix category. Both categories are vast. Regional producers of syrups should consider diversification into the other syrup categories. Those regional products are poorly packaged in standard bottles with poor labelling. Many “look alike” exist with poor brand differentiation.

Syrup comes in a variety of sizes from 350 ml to 710 ml with a variety of prices. The pricing of syrup on a per milliliter basis show a high of $0.0142 per ml for 250 ml to a low of $0.0037 ml for 500 ml.

3.12.2. Honey

Some countries prohibit the importation of honey. In these markets, consumers must purchase only locally produced honey. These products are of good quality but are limited in quantities and poorly packaged. This creates a supply and demand problem and often there is limited honey available for sale.

In other countries, international produced honey is prevalent with great disparities between local and international in packaging, price, quality and presentation. Often locally produced honey is featured in recycled packs. Honey producers will need to be organized to fully take advantage of this growing promising market.

Honey comes in a variety of sizes from 250 ml to 750 ml with a variety of prices. Pricing honey on a per milliliter basis shows a high of $0.0203 ml to a low of $0.0162 ml. There seems to be very little price advantage on size. Looking at the 250 ml size pricing ranges $11.04 for honey from Grenada to $4.58 from the United States.

3.12.3. **Sugar**

The sugar market in the region is dominated by brands from Barbados and Guyana and are on par with international products in this category with excellent packaging, price, quality and product. Although there are few international brands in the marketplace, regional products enjoy the lion's share of the market.

New interesting sugars such as coconut sugar is in limited supply in the Bahamas and presents a market opportunity for regional producers.

3.13. Jams & Jellies

There is a saturation of products in this category from local, regional and international brands. International brands are featuring unique packages in glass and squeeze bottle shapes. In some cases, international brands are less expensive than local and regional brands. Many regional brands “look alike” because of the standard bottle shape used by most. Some regional artisanal products which are well packaged are positioned for the gourmet and tourist boutiques. These products tend to attract higher price points.

The price range for this category was $2.20 to $2.35 for the 12 oz. (355 ml) and from $1.72 to $4.26 for the 428 ml to 454 ml sizes. Also there were two clusters of prices at $1.80 and $3.56 with only a few products in between.


CROSSE & BLACKWELL
ORANGE MARMALADE
Conchita
Welch's
CHIVERS
BLACK CHERRY
Orange & Mango
essential Waitrose
SMUCKER'S
SUGAR FREE
Orange Marmalade


Frootsy
Banana Jam
Guayaba
HOMEMADE GINGER MARMALADE
Matouk's
Pineapple Jam
Mermelada de Piña
St. Lucia
Irie Jam
Lucian Apricot Jam
Net Weight: 454g
Best by: 30 Dec 2016

3.13.1. **Pepper Jelly**

Regional products in this category offer wider ranges and better varieties with fruit infused pepper jellies. Regional products in this category are well packaged and enjoy the competitive edge. International products are basic and offer less variety. Products are well positioned for supermarkets, gourmet retailers and tourist boutiques.

3.14. Baked Goods

This product category is dominated by local bakeries that deliver fresh product daily. Few international products are seen in the fresh section of the supermarket. Some internationally produced bagels and other unique products were featured in the refrigerated section. Local producers clearly dominate this product category. The products are fresh, well packaged and well-priced.

Unique other traditional breads such as the Jamaican hard dough bread is available in niche markets. Local bakeries make these “Jamaican” breads.

3.14.1. **Rum Cake**

Rum cakes are traditional Caribbean products. Tortuga headquartered in the Cayman Islands has production and private label arrangements with producers in Barbados, Jamaica, The Bahamas and St. Lucia. Collectively they control the lion's share of this market. The products are uniquely packaged, are of high quality, great taste and priced appropriately. There is no real international completion in this market segment.

3.15. Import Duties

Products	Code	Antigua & Barbuda			St. Lucia			Barbados			Trinidad			Bahamas		
		CARIFORUM	GLOBAL		CARIFORUM	WORLD		CARIFORUM	WORLD		CARIFORUM	WORLD		CARIFORUM	WORLD	
	Code	Import Duty	Import Duty	VAT	Import Duty	Import Duty	VAT	Import Duty	Import Duty from the World	VAT	Import Duty	Import Duty	VAT	Import Duty	Import Duty	VAT
Sauces																
Pepper Sauce	21039010	0%	20%	15%	0%	20%	15%	0%	20%	17.5%	0%	20%	15%	20%	20%	15%
Pepper Jelly	20079990	0%	20%	15%	0%	20%	15%	0%	20%	17.5%	0%	20%	15%	20%	20%	15%
Chutney	21039090	0%	20%	15%	0%	20%	15%	0%	20%	17.5%	0%	20%	15%	20%	20%	15%
Jerk Sauce	21039090	0%	20%	15%	0%	20%	15%	0%	20%	17.5%	0%	20%	15%	20%	20%	15%
Marinades	21039090	0%	20%	15%	0%	20%	15%	0%	20%	17.5%	0%	20%	15%	20%	20%	15%
Bakery Products	1905	0%	20%	15%	0%	20%	15%	0%	20%	17.5%	0%	20%	15%	40%	40%	15%
Rum Cakes	19059010	0%	20%	15%	0%	40%	15%	0%	20%	17.5%	0%	20%	15%	0%	0%	15%
Other baked goods	1905909090	0%	20%	15%	0%	20%	15%	0%	20%	17.5%	0%	20%	15%	40%	40%	15%
Condiments																
Jams & Jellies	20079990	0%	20%	15%	0%	20%	15%	0%	20%	17.5%	0%	20%	15%	10%	10%	15%
Fruit Butters & Cheeses	20079940	0%	20%	15%	0%	20%	15%	0%	20%		0%	20%	15%	10%	10%	15%
Confectionery pepper wines	21039090	0%	20%	15%	0%	20%	15%	0%	20%	17.5%	0%	20%	15%	10%	10%	15%
Dried Pepper	9041100	0%	40%	15%	0%	40%	15%	0%	40%	17.5%	0%	40%	15%	10%	10%	15%
Beverages																
Fruit Juices & Concentrates	2009	0%	40%	15%	0%	40%	15%	0%	40%	17.5%	0%	40%	15%	10%	10%	15%
Bottled Coconut Water	2009.8999	0%	20%	15%	0%	20%	15%	0%	20%	17.5%	0%	20%	15%	10%	10%	15%
Hot Beverages																
Coffee	901															
Coffee, roastedNot decaffeinated	09012100	0%	40%	15%	0%	40%	15%	0%	40%	17.5%	0%	40%	15%	0%	0%	15%
Coffee, roasted Decaffeinated	09012200	0%	40%	15%	0%	40%	15%	0%	40%	17.5%	0%	40%	15%	0%	0%	15%
Green tea (not fermented) in immediate packings of a content not exceeding 3 kg	09021000	0%	5%	15%	0%	5%	15%	0%	5%	17.5%	0%	5%	15%	0%	0%	15%
Other green tea (not fermented)	09022000	0%	5%	15%	0%	5%	15%	0%	5%	17.5%	0%	5%	15%	0%	0%	15%
Black tea (fermented) and partly fermented tea, in immediate packings of a conte	09023000	0%	5%	15%	0%	5%	15%	0%	5%	17.5%	0%	5%	15%	0%	0%	15%
Other black tea (fermented) and other partly fermented tea	09024000	0%	5%	15%	0%	5%	15%	0%	5%	17.5%	0%	5%	15%	0%	0%	15%
Herbal Teas	09024000	0%	20%	15%	0%	20%	15%	0%	20%	17.5%	0%	20%	15%	30%	30%	15%
instant coffee	210112	0%	20%	15%	0%	20%	15%	0%	20%	17.5%	0%	20%	15%	20%	20%	15%
Coconut Oil																
Coconut oil and its fractions, whether or not refined, but not chemically modified (excl. crude)	151319000	0%	40%	15%	0%	40%	15%	0%	40%	17.5%	0%	40%	15%	40%	40%	15%
Crackers and Biscuits																
Biscuits, Unsweetened	19059010	0%	20%	15%	0%	20%	15%	0%	20%	17.5%	0%	20%	15%	0%	0%	15%
Bread, pastry, cakes, biscuits and other bakers wares, whether or not containing cocoa; communion wafers, empty cachets of a kind suitable for pharmaceutical use, sealing wafers, rice paper and similar products (excl. crispbread, gingerbread and the like, sweet biscuits, waffles and wafers with water content of <= 10%, rusks, toasted bread and similar toasted products) : Other	1905090	0%	20%	15%	0%	20%	15%	0%	20%	17.5%	0%	20%	15%	40%	40%	15%
																15%
Gluten Free	190120	0%	15%	15%	0%	15%	15%	0%	15%	17.5%	0%	15%	15%	40%	40%	15%
Breads/pancake/waffle mixes	190120	0%	15%	15%	0%	15%	15%	0%	15%	17.5%	0%	15%	15%	40%	40%	15%
Pancakes	190120	0%	15%	15%	0%	15%	15%	0%	15%	17.5%	0%	15%	15%	40%	40%	15%
Waffle Mixes	190120	0%	15%	15%	0%	15%	15%	0%	15%	17.5%	0%	15%	15%	40%	40%	15%
Sweeteners																
Sugar	17011490	0%	40%	15%	0%	40%	15%	0%	40%	17.5%	0%	40%	15%	0%	0%	15%
Raw cane sugar (excl. added flavouring or colouring) : Cane sugar for retail sale in packages of not more than 10kg	17011110	0%	40%	15%	0%	40%	15%	0%	40%	17.5%	0%	40%	15%	0%	0%	15%
Cane molasses resulting from the extraction or refining of sugar : Edible	17031020	0%	15%	15%	0%	15%	15%	0%	15%	17.5%	0%	15%	15%	30%	30%	15%
Syrups	170230	0%	5%	15%	0%	5%	15%	0%	50%	17.5%	0%	5%	15%	30%	30%	15%
Honey	04090000	0%	0%	15%	40%	40%	15%	40%	40%	17.5%	40%	40%	15%	35%	35%	15%

**Import Duties Sourced for Antigua & Barbuda, Barbados, St. Lucia & Trinidad & Tobago for the year 2013 from WTO at http://tariffdata.wto.org/default.aspx*
***Import Duties Sourced for the Bahamas for 2013 from Market Access Map at http://www.macmap.org*
*** Bahamas has not implemented the CARICOM Duty Schedule as of yet as told by a Custom's Officer in the Bahamas.*

3.16. Country Reports

3.16.1. Antigua & Barbuda

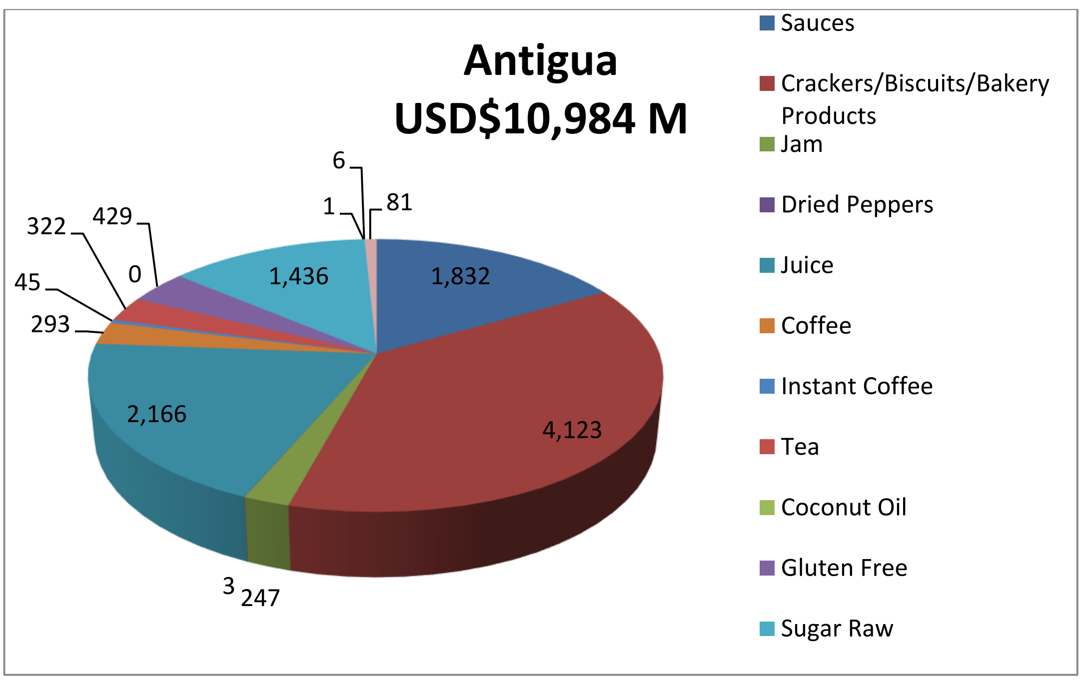
3.16.1.1. Country Overview

Antigua is a member of CARIFORUM and The OECS. The capital city is St. John's, the currency is the Eastern Caribbean dollar (E.C. $), and it is home to approximately seventy thousand, seven hundred and thirty-seven (70,737) people. Tourism is the main source of income for Antigua.

"The emphasis in Antigua and Barbuda Trade policy, has evolved over time, changing from an inward looking import substitution regime to a more outward orientation. The cornerstone of Antigua and Barbuda's current development policy is the encouragement of local and foreign direct investment."

There is a national standards bureau in Antigua, however, it would appear that monitoring of the manufacturing sector to include production facilities, standards and labeling regulations are limited or non-existent. Many perceived larger manufacturers are still operating from their homes, unmonitored. Some are exporting to other countries including the US. Recalls and traceability are non-existent for many of the local products within the study area on the shelf.

3.16.1.2. Market Size



3.16.1.3. Other Market Considerations

The margin charged by distributors was in-line with industry standards of 22% to 28% depending on the agreement. Additionally distributors need a marketing budget to start a new brand and maintain it in the market. Both the distributor and manufacturer come to an agreement on a marketing plan and the cost involved to launch the product. This typically is 3% of sales that distributor matches.

Shipping into the market can take 60 days from most CARICOM countries and distributors like to maintain a 30 to 60 day inventory. Thus manufacturers need to ensure their products have a long enough shelf-life to include the time it sits on the store shelf (90 to 120 days) and the time a consumer actually uses the product.

While competition from international markets outside of CARICOM are able to sell their product in a number of cases less than the local produced products even though they have a 40% tariff and shipping cost. Some of this is due to the local market such as a high cost of electricity, lack of materials, and scales of efficiencies the other is due to the lack of knowledge on pricing strategy that supports a brand. For example Smucker's Jam is priced as a high end product demanding a premium price in the market. If one purchases Smucker's Strawberry Jam or Smucker's Grape Jam the price is the same. Now if a local competing brand for jam is in the market and they offer a grape and strawberry, the strawberry will cost more. This confuses the consumer and the brand strategy of the product. Now one has to make another decision on flavor and price instead of just selecting the jam of choice. Simply by cost averaging you can unify the price and more strongly position the brand.

3.16.1.4. Consumers Survey Summary

These respondents shop about three times per week, visit two stores and typically spend $360 per shopping trip. The majority, 91 percent, of the respondents were residents of the Island and 9 percent were visitors.

Antiqua and Barbuda respondents were less intent on purchasing Caribbean produced products over international brands and less likely to choose to shop at a store based on its selection of Caribbean products. However, they did believe it is important that food is made in the Caribbean and that food is locally produced.

The respondents somewhat satisfied with their store's selection of local products, but more so with its selection of Caribbean and significantly more satisfied with the selection of international products. This suggests that there is opportunity in Antiqua and Barbuda to increase both local and Caribbean based product offerings as the level of satisfaction with these categories is significantly less than satisfaction with international products.

These respondents were very satisfied with the range and variety of products being offered in the nine product categories being studied. The level of satisfaction was significantly higher than found in the Bahama's and noticeable higher than that in the other countries.

These respondents were the least satisfied with the Caribbean produced products in their store for coffee, coconut oil and gluten free product categories. Overall, they were less satisfied with these product category offerings than were other respondents. This suggests opportunities for including more Caribbean products to increase their satisfaction.

These respondents preferred local pepper sauce, jams, rum cakes, and sugar category products over Caribbean and International brands. These differences across all nine product categories were significant. Interestingly, international brands were preferred over Caribbean brands in a couple of categories like fruit juices, coffee, crackers, gluten free, and sugar. These categories offer opportunities to increase quality Caribbean based products.

Organic products are moderately appealing as are fair trade products to these respondents. They are not familiar with fair trade nor are they willing to pay for that attribute, on average. They would be willing to recommend any of the Caribbean products described in the nine categories to friends and families.

Respondents somewhat agree that Caribbean food products taste and flavor beat their international competitors. This agreement with this attribute was rated among the highest, only second to healthy products. Texture, packaging appearance, price and shelf life attributes has significantly less level of agreement in that Caribbean products beat their international competitors. Looks like there are opportunities for Caribbean products to address a number of these product attributes to even better position themselves against their international competitors.

Overall, the respondents rated local products as being a better value than Caribbean or international products. The perceived value between both Caribbean and international products were rated very similarly. Again, this provides opportunities for local products as they are perceived to be a better value.

Price was rated as being very is important in choosing Caribbean produced products as is the product coming from a trust worthy manufacturer. However, price was less important here than in the other countries excluding Antiqua and Barbuda.

3.16.1.5. Key Supermarkets

CARIFORUM products were well represented in all major supermarkets surveyed. The Epicurean which is the largest and most upscale supermarket carried a larger variety of international produced goods.

Ranking	Store
L	Bargain Center Supermarket
H	The Epicurean
H-M	Island Provision Ltd/Gourmet Basket
M	1st Choice Foods
L-M	Chase Distributors
H=High End Price Point, M=Medium Price Point, L=Low Price Point	

3.16.1.6. Manufacturers

Dominant producers in Antigua are Susie's Hot Sauce and Caribbean Bean Coffee Co. There is much scope for additional market share in the Coffee category as currently the market is dominated by Nescafe Instant Coffee.

Coconut oil is trending upwards. A tremendous market opportunity presents itself for Raw Island Products as in general the presence of Coconut Oil from outside sources was virtually non-existent.

Consumers seem to have a preference for fresh coconut water as opposed to store bought. Their presence of this item was nonexistent and there does not appear to be a market opportunity.

Manufacturer	Product Type	Ranking on island
Raw Island Products	Coconut Oil	1
Java Roast 2go	Coffee	2
Caribbean Been Coffee Co.	Coffee	1
Carib Bean Roaster	Coffee	3
Raw Island Products	Fruit Cheeses	1
Grandma Aki	Herbal Teas	2
Wadadli Bush Tea	Herbal Teas	1
MHN Hillside Herbals	Herbal Teas	3
CCR Ltd. Antigua	Honey	2
Paige	Honey	1
Nan's	Honey	3
Nicole's Table	Jams/Jellies	1
Denis	Pepper Sauce	2
Susie's Hot Sauce	Pepper Sauce	1
Melee Tings	Rum Cake	2
Dolcie's	Rum Cake	1
Caribbean Seamoss Farms Antigua	Seamoss Concentrate	1
Vangee's Flavors & Delights	Spices and Seasonings	2
Grandma Aki	Spices and Seasonings	1
Ranking: 1 = Most Dominant		

3.16.1.7. Importers/Distributors

Distributors expressed concerns with getting products cleared at the port. There is also a perception of excessive fees associated with importing. There are price controls in Antigua which are set by the Government's consumer affair department. There were no significant issues raised with sourcing products from other Caribbean countries.

Importers are keen to source new niche products that are well priced, well positioned and not competitors of existing brands already in the market. Most distributors indicated that they seldom get regular requests for new product indicating that the marketing efforts of CARIFORUM suppliers are weak at best.

- There was a large Gluten Free section at one store with very little movement of product. This category is a niche market and does not pose an opportunity for CARIFORM suppliers due to limited demand.
-
- Buyers are seeking: Coconut Oil, local honey, and more broad ranges of exotic sauces and marinades.

The main importers/distributors in Antigua are:

Anjo Wholesalers	
A.S. Bryden & Sons (Antigua) Ltd	*
Inter-Island Sales & Supply	
Caribbean Distribution Co.	
Brisbane O D. & Co (Antigua) Ltd.	
Hutchinson Antigua Ltd	*
Chase Distributors	*
Island Provision Ltd & Importer	
Epicurean Fine Foods and Pharmacy & Importer	*
* **Dominant Players**	

3.16.2. Regulatory Conditions

Free Circulation of Goods within the OECS. OECS is working on a regime for free circulation of goods within the OECS. This is consistent withArticle10 of the Protocol to the Revised Treaty of Basseterre Establishing The Organization of Eastern Caribbean States Economic Union. The Project will support the Economic Union's goal to establish a regime whereby goods will move within the Economic Union faster and at lower cost, due to the removal of technical administrative and fiscal barriers. This is expected to result in increased intra-regional trade within the OECS and improved regional management of revenue from trade transactions. This program will result in a Common Customs Tariff for OECS.
Source: http://www.oecs.org/tpu-newsletter/archive/view/listid-2-trade-policy-unit/mailid-66-trade-update-month-year

3.16.3. Price Controls

There are price controls for distributors and retailers. While the distributors mark-up is restricted to 10% it has been largely ignored and not enforced as it is unrealistically low. The mark-up at the retail end is 15% and is strictly enforced. Measures are also in place to protect local producers through tariffs. A list of those products can be found earlier in the report under Section 2.3 -Article 164 and provide a market opportunity for companies

3.16.4. Duties and Taxes

Products	Code	Antigua & Barbuda CARIFORUM Import Duty	Antigua & Barbuda GLOBAL Import Duty	Antigua & Barbuda VAT
Sauces				
Pepper Sauce	21039010	0%	20%	15%
Pepper Jelly	20079990	0%	20%	15%
Chutney	21039090	0%	20%	15%
Jerk Sauce	21039090	0%	20%	15%
Marinades	21039090	0%	20%	15%
Bakery Products	1905	0%	20%	15%
Rum Cakes	19059010	0%	20%	15%
Other baked goods	1905909090	0%	20%	15%
Condiments				
Jams & Jellies	20079990	0%	20%	15%
Fruit Butters & Cheeses	20079940	0%	20%	15%
Confectionery pepper wines	21039090	0%	20%	15%
Dried Pepper	9041100	0%	40%	15%
Beverages				
Fruit Juices & Concentrates	2009	0%	40%	15%
Bottled Coconut Water	2009.8999	0%	20%	15%
Hot Beverages				
Coffee	901			
Coffee, roastedNot decaffeinated	09012100	0%	40%	15%
Coffee, roasted Decaffeinated	09012200	0%	40%	15%
Green tea (not fermented) in immediate packings of a content not exceeding 3 kg	09021000	0%	5%	15%
Other green tea (not fermented)	09022000	0%	5%	15%
Black tea (fermented) and partly fermented tea, in immediate packings of a conte	09023000	0%	5%	15%
Other black tea (fermented) and other partly fermented tea	09024000	0%	5%	15%
Herbal Teas	09024000	0%	20%	15%
instant coffee	210112	0%	20%	15%
Coconut Oil				
Coconut oil and its fractions, whether or not refined, but not chemically modified (excl. crude)	151319000	0%	40%	15%
Crackers and Biscuits				
Biscuits, Unsweetened	19059010	0%	20%	15%
Bread, pastry, cakes, biscuits and other bakers wares, whether or not containing cocoa; communion wafers, empty cachets of a kind suitable for pharmaceutical use, sealing wafers, rice paper and similar products (excl. crispbread, gingerbread and the like, sweet biscuits, waffles and wafers with water content of <= 10%, rusks, toasted bread and similar toasted products) : Other	1905090	0%	20%	15%
Gluten Free	190120	0%	15%	15%
Breads/pancake/waffle mixes	190120	0%	15%	15%
Pancakes	190120	0%	15%	15%
Waffle Mixes	190120	0%	15%	15%
Sweeteners				
Sugar	17011490	0%	40%	15%
Raw cane sugar (excl. added flavouring or colouring) : Cane sugar for retail sale in packages of not more than 10kg	17011110	0%	40%	15%
Cane molasses resulting from the extraction or refining of sugar : Edible	17031020	0%	15%	15%
Syrups	170230	0%	5%	15%
Honey	04090000	0%	0%	15%

*Import Duties Sourced for Antigua & Barbuda, Barbados, St. Lucia & Trinidad & Tobago for the year 2013 from WTO at http://tariffdata.wto.org/default.aspx

3.16.5. Other conditions

Producers seem better equipped to export in countries with strong enforcement of labeling and other requirements. Phasing in enforcement over a two year period with a robust education campaign will assist the companies to meet international standards, and it will also assist in creating a higher quality product in country. While this involves a promotion effort to a countries producers, it needs to be eventually strictly enforced. Notifying a company of infraction and providing a reasonable timeframe to correct the label on new product would be part of a learning curve.

3.16.6. Market Opportunities

Buyers are seeking: Coconut Oil, Honey, Seamoss Drinks, and a more broad ranges of exotic sauces and marinades.

3.16.6.1. CARIFORM Suppliers

The following CARIFORUM suppliers were found on the shelves in Antigua. While there were limited products from a wide range of CARIFORUM manufacturers, Bermudez Biscuit Company, Nestle, SM Jaleel, Pine Hill Diary, Grace Kennedy, Caribbean Dreams and Chief commanded significant shelf space and were well distributed throughout the island.

There was no major opportunity for organic foods in the market. It is interesting to note that people taking the survey perceive local food to be the same as organic.

No pancake & gluten free products were found from CARIFORUM. International Gluten free products had a fairly large display of these products but according to the store manager they have not been moving. It sells but to the tourist and people stocking their yachts.

The manufactures in Antigua & Barbuda handle their distribution to the stores. Manufactures looking to enter the export market should allow a distributor to deal with their local base, while they concentrate on the export market and growing the company. There is a good deal of daily distraction in maintaining the distribution in-house that hinders these initiatives.

International packaging and labelling rules apply. Distributors will only consider products that meet regulatory requirements.

Buyers are seeking: Coconut Oil, Regional Honey, Seamoss Drinks, and a more broad ranges of exotic sauces and marinades.

Coconut Oil was non-existent, a market opportunity for CARIFORUM producers.

Fruit cheeses normally produced locally were non-existent. There is no market opportunity.

CARIFORUM honey suppliers are primarily local and not exporting to other member states. Consumers seem to have a preference to locally produced honey.

The coffee market is dominated by Nescafe and international brands. The two local coffee brands, Caribbean Bean Coffee and Java Roast Coffee have been given prime retail space to support their products at Epicurean and are very noticeable on the shelves at other stores. This is one of the few products that is not being carried in other countries and may have immediate potential for exports. There was no Jamaican coffee on the shelves in any of the countries, while there was some from Trinidad & Tobago. The whole bean and freshly ground coffee is a higher end product with the stores suppling the lower end of the market mostly carrying instant coffee.

Many products were seen on the shelves positioned as Caribbean products, but made elsewhere.

	Coffee & Herbal Teas	**Caribbean Coffee House**	**Trinidad**
*	Crackers & Biscuits	WIBISCO	Barbados
*	Crackers & Biscuits	Bermudez Biscuit Company	Trinidad
*	Drink	House of Angostura	Trinidad
	Energy Drink	Wisynco The Innovators	Jamaica
*	Herbal Teas	Caribbean Dreams	Jamaica
*	Juices	Nestle	Trinidad
*	Juices	S M Jaleel	Trinidad
	Juices	Brava International Ltd	Trinidad
	Juices	Rumbrella Club Ltd	Trinidad
*	Juices	Pine Hill Dairy	Barbados
*	Juices, Spices & Sauces	Grace Kennedy Manufacturing	Jamaica
	Rum Cake	Bakers Choice Barbados	Barbados
	Spices & Sauces	Spur Tree Jamaican	Jamaica
*	Spices, Sauces & Seasonings	Chief Brand Products	Trinidad
	Syrups	Bello	Dominica

* **Dominant players throughout five selected states**

3.16.6.2. International Competition Antigua

Products in the study group were seen from a diverse group of countries. Gluten Free products are dominated by international brands. Of the brands seen, the packaging and presentation was far superior to Regional brands.

Supply and demand of honey needs a balance. Based on the research, international brands of honey is purchased in the absence of the availability of locally produced goods.

Gluten Free does not pose a market opportunity as it is considered a niche category with very small volumes.

Country of Origin	Product Category/type	Manufactured by
Canada	**Cakes**	**Weston** Bakeries Ltd
Puerto Rico	**Coconut** Milk	**Coco Lopez** Inc
Columbia	**Crackers** & Biscuits	**Noel**
Malta	**Crackers** & Biscuits	**Consolidated** Biscuit Co. Ltd
Scotland	**Crackers** & Biscuits	**United Biscuits**
United Kingdom	**Crackers** & Biscuits	**Fox's Biscuit**
United Kingdom	**Crackers** & Biscuits	**United Biscuits**
United Kingdom	**Gluten** Free	**Mornflake Oats** Ltd
USA	**Gluten** Free	**1-2-3 Gluten** Free Inc
London	**Herbal** Teas	**Associated British** Foods
USA	**Herbal** Teas	**Hain Celestial** Group
USA	**Herbal** Teas	**Bigelow Tea**
Finland	**Honey**	**Polar Honey** Finland
USA	**Honey**	**Private** Label
USA	**Honey**	**Sioux** Honey Association
France	**Jams** & Jellies	**Bonne** Maman
United Kingdom	**Jams** & Jellies	**Premier Foods**
Canada	**Juices**	**Tri Mark** Food Brands Inc
USA	**Juices**	**Dr.** Pepper Snapple group
United Kingdom	**Pancakes**	**Yorkshire Puddings** & Pancakes mix
USA	**Pancakes**	**Bisquick**
USA	**Pancakes**	**Guaker** Oats Company
United Kingdom	**Sauces**	**H.**J Heinz Company
India	**Spices** & Seasonings	**ITC-** Imperial Tobacco Company
Italy	**Spices** & Seasonings	**SALPA (Stabilimento Astese** Lavorazione Prodotti Alimentari)
London	**Spices** & Seasonings	**The Legend of** Geeta
South Africa	**Spices** & Seasonings	**Nando's**
United Kingdom	**Spices** & Seasonings	**Premier Foods**
USA	**Spices** & Seasonings	**Badia Spices**
USA	**Spices** & Seasonings	**Pillsbury company**
Switzerland	**Spices,** Seasonings & Soups	**Nestle**

USA	**Syrups**	**Log** Cabin

3.17. St. Lucia

3.17.1.1. Country Overview

Tourism is the main source of income for St Lucia and the industry is its biggest employer. St. Lucia is a member of CARIFORUM and The OECS. The capital city is Castries, the currency is the Eastern Caribbean dollar (E.C. $), and it is home to approximately one hundred and seventy six thousand (176,000) people.

St. Lucia is a founding member of the Caribbean Common Market and Community (CARICOM). St. Lucia has participated in the GATT since April of 1993 and in the WTO since January 1995.

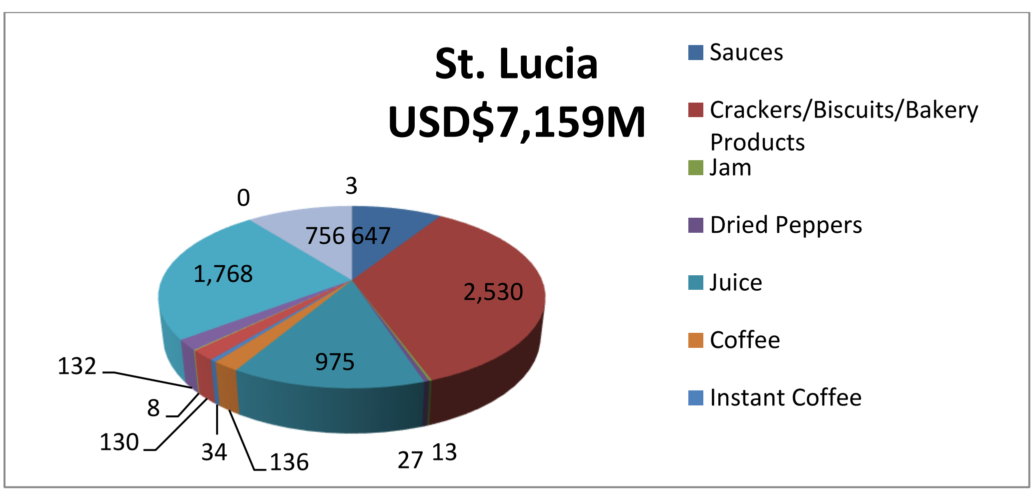
There are several thriving manufacturers in St. Lucia who dominate significant shelf space and are well reputed. Baron Foods, Viking Traders and Frootsy are the locally produced market leaders. Baron Foods is positioned as an international brand, well packaged and certainly is considered the dominate player in the Food & Beverage sector in St. Lucia who collectively command significant shelf space.

Overall, it was evident that supermarkets support local producers and will buy products that are well labelled and packaged.

Packaging, Labelling and Food Safety standards are strictly enforced and monitored by The St. Lucia Standards Bureau. All manufacturers must be certified before they are able to sell to the major supermarkets. Systems are in place for traceability and recalls. Batch number labelling is mandatory for all products being sold.

Importation of Honey is prohibited. Local honey producers are not organized. Supply and demand issues exist. There have been a few failed defragmented government initiatives to strengthen the honey producers.

3.17.1.2. Market Size



3.17.1.3. Other Market Considerations

St. Lucia is the most advanced tourism destination of the OECS countries. The Rodney Bay area has been developed with a wide array of shopping, restaurants, bars and hotels. This area attracts high end consumers seeking exciting island experiences. It is a great location for launching products and focused marketing efforts

3.17.1.4. Consumers

These respondents shop about three times per week, visit 2.5 stores and typically spend $369 per shopping trip. The respondents in St. Lucia were a little more diverse than those in the other countries. Three quarters of the respondents were residents while nearly a quarter were visitors. This is significantly different from the respondent sample found in the other countries.

St. Lucian's are significantly more likely to purchase Caribbean products over international products than their counter parts in other countries, excluding Trinidad and Tobago. They are significantly more likely to indicated that it is important food is produced in the Caribbean, let a store's Caribbean product selection impact their shopping decision than respondents in other countries, excluding Trinidad and Tobago.

St. Lucian's were somewhat satisfied with their store's selection of local and to a higher degree Caribbean products. However, they were significantly more satisfied with the selection on international products. Again, this suggests that there is room to include more local and Caribbean based products offerings.

These respondents were satisfied with the variety and range of products being offered in the nine product categories being studied. Seventy seven percent were satisfied indicating that there is some room for improvement that may be filled by local and Caribbean based products.

These respondents were significantly more satisfied with their store's offering of Caribbean products in the coffee, coconut oil, and gluten free products than were other respondents. Overall, they were more satisfied with Caribbean product selection in the nine categories than were the other respondents. However, there is significant room to increase satisfaction by increasing Caribbean products in all of these categories.

These respondents were less local loyal than residents in other countries. Gluten free, Crackers, and the coffee categories had approximately 50 percent or less preference for local products. Overall, they rated local product categories lower than their counterparts in other categories.
Organic products are very appealing. They are not familiar with fair trade nor are they willing to pay for that attribute, on average. They would be willing to recommend any of the Caribbean products described in the nine categories to friends and families.

Respondents strongly agree that Caribbean food products taste and flavor beat their international competitors. This agreement with this attribute was rated among the highest, only second to healthy products. Packaging appearance, price and shelf life attributes has significantly less level of agreement in that Caribbean products beat their international competitors. It appears there are opportunities for Caribbean products to address a number of these product attributes to even better position themselves against their international competitors.

Overall, the respondents rated local products as being a better value than Caribbean or international products. However, the difference between local and Caribbean and international products was not as large as seen in other countries. The perceived value between both Caribbean and international products were rated very similarly and suggest strict competition with local products. Again, this provides a marketing opportunity for local products to convey that they are a better value.

Price was rated as being very is important in choosing Caribbean produced products as is the product coming from a trust worthy manufacturer.

3.17.1.5. Supermarkets St. Lucia

The majority of the CARIFORUM products seen on the shelves are produced in Trinidad and Jamaica. Five top ranked Caribbean Producers are: Baron Foods and Viking Traders from St. Lucia, Bermudez, Chief, Matoux and Sunshine Snacks from Trinidad and Grace Kennedy from Jamaica.

Ma St. Rose, Baron Foods, Frootsy and Viking Traders products were well represented throughout the market. There is a strong buyer loyalty to support these national brands.

Ranking	Store
H	**Super J (9 locations)**
H	**GL Foods**
M	**Glace Supermarket (4 locations)**
L	**Dilly's Supermarket**
H-M	**Consolidated Foods Ltd**
H=High End Price Point, M=Medium Price Point, L=Low Price Point	

3.17.1.6. Manufacturers St. Lucia

Consumers prefer fresh coconut water and as such, there is little to no product on the shelfs. In one store, fresh bottled coconut water was available in limited quantities. St. Lucia presents no opportunity for the sale of bottled Coconut Water. Coconut Oil is trending upwards and most buyers are seeking to acquire competitive brands. There are three (3) coconut oil micro producers in St. Lucia. Frootsy is producing a Virgin Coconut Oil which fetches a premium price. These producers are encouraged to seek export markets in Antigua and islands north of Antigua. The largest coconut oil producer, St. Lucia Coconut Growers Association seems to be defunct.

The coffee market is dominated by Nescafe and international brands. An opportunity to grow coffee sales exists both nationally and regionally.

Jerk Sauces are slow sellers in St. Lucia.

No major opportunities are presented for Organic Foods.

Gluten Free is a niche category with limited market opportunities.

The manufactures on St. Lucia handle their distribution to the stores. Smaller less organized manufacturers should consider appointing on-island distributors so that they can focus on manufacturing/producing.

Ranking	Manufactured by	Product Category/type
	Anjays Cocoa	Hot Beverages, Cocoa
*	Baron Foods Ltd	Juice Concentrates, Syrups, Pepper Sauce, Sauces & Seasonings, Spices
	Dark Seamoss	Gluten free Seamoss concentrate
	Debbie's	Chips
*	Frootsy Foods Ltd	Extra Virgin Coconut Oil, Honey, Jams & Jellies, Pepper Sauce, Sauces & Seasonings
	Ire Jam	Jams & Jellies
	J&R Enterprises	Syrups, Molasses
	M&T	Extra Virgin Coconut Oil, Fruit Cheeses, Spices, Jams & Jellies, Spices
*	Ma St Rose Creole Delight	Jams & Jellies
	Morvin's Farm	Honey
	Nicholson Lucian	Honey
	Prosperity Foods	Sauces & Seasonings
*	St. Lucia Distillers Ltd	Rum Cake
	Sweet Hen Products	Seamoss Drink
	Taste of St. Lucia	Coconut Oil
	The Fudge Cottage	Fruit Cheeses
*	Viking Traders Ltd	Rum Cake, Coconut Milk, Coffee, Juices & Juice Concentrates, Sauces & Seasonings, Pepper Sauce
	Winfresh Limited	Sauces & Seasonings, Pepper Jellies
*** = Dominant Manufacturers**		

3.17.1.7. Importers/Distributors

The Massey conglomerate includes Massy Stores, Super J Supermarkets and Massey Distribution. As a result, Massy has immense purchasing power. Massy stores also owns Mega Stores, a large wholesale shopping center.

Massey's main competitor is Bryden & Partners/Peter & Company. Massy distributes its store brand under the name Valrico which mirrors the Grace Kennedy brand. Importers seem to have a preference to purchase products from Jamaica & Trinidad.

Purchasing trends in the selected study products indicate that importers/distributors will tend to source local or regional products.

Importers indicated that not all exporters are prepared for exports. Often there are no marketing budgets and no allocation of resources for product launch, marketing and promotions. Typically these costs are shared between manufacturers and distributors.

Minimum order quantities such as 20ft or 40ft containers are often too high to test products in the marketplace. This is due to limitations with transportation. Often, the CARIFORUM producers make no provision for test marketing investments.

Gluten Free is a niche category sought by high end users and poses no real opportunities evident that would create the economies of scale to begin local or regional production.

Buyers believe there are grave disparities in pricing between local and regional goods compared to international goods. Due to CARICOM tariff arrangements, goods produced locally or regionally are imported duty free. International products are subject to import tariffs based on the item. Too often these concessions do not translate to lower prices on the shelf.

Coconut water moves slowly as the market primarily prefers fresh. Jerk sauces and chutneys are not popular.

Regional Products Sourced
80% Pepper sauce
40% Marinades,
60% Jams & Jellies
100% Fresh coconut water
5% Chutneys
5% Coffee
60% Juices
95% Fresh Coconut Water

Distributors/Importers in St. Lucia are seeking new lines of Seamoss Drinks, Teas, Biscuits and Coconut Oil. Local and regional supply is inconsistent and irregular. There is more demand than adequate supply. There are private label opportunities with Massy and Renwick.

Armstrong Frank B St. Lucia	
Brydens & Partners Ltd/Peter & Company	*
Cox Distributors	
Marcellin & Co. Ltd	
Massy Distributors	*
Renwick	*
V & A Trading Co. Ltd	
*** = Dominant Importers/Distributors**	

3.17.1.8. Regulatory Conditions

OECS is working on a regime for free circulation of goods within the OECS. This is consistent with Article 10 of the Protocol to the Revised Treaty of Basseterre Establishing The Organization of Eastern Caribbean States Economic Union. The Project will support the Economic Union's goal to establish a regime whereby goods will move within the Economic Union faster and at lower cost, due to the removal of technical administrative and fiscal barriers. This is expected to result in increased intra-regional trade within the OECS and improved regional management of revenue from trade transactions. This program will result in a Common Customs Tariff for OECS.
Source: http://www.oecs.org/tpu-newsletter/archive/view/listid-2-trade-policy-unit/mailid-66-trade-update-month-year

3.17.1.9. Duties and Taxes

Products	Code	St. Lucia CARIFORUM Import Duty	WORLD Import Duty	VAT
Sauces				
Pepper Sauce	21039010	0%	20%	15%
Pepper Jelly	20079990	0%	20%	15%
Chutney	21039090	0%	20%	15%
Jerk Sauce	21039090	0%	20%	15%
Marinades	21039090	0%	20%	15%
Bakery Products	1905	0%	20%	15%
Rum Cakes	19059010	0%	40%	15%
Other baked goods	1905909090	0%	20%	15%
Condiments				
Jams & Jellies	20079990	0%	20%	15%
Fruit Butters & Cheeses	20079940	0%	20%	15%
Confectionery pepper wines	21039090	0%	20%	15%
Dried Pepper	9041100	0%	40%	15%
Beverages				
Fruit Juices & Concentrates	2009	0%	40%	15%
Bottled Coconut Water	2009.8999	0%	20%	15%
Hot Beverages				
Coffee	901			
Coffee, roastedNot decaffeinated	09012100	0%	40%	15%
Coffee, roasted Decaffeinated	09012200	0%	40%	15%
Green tea (not fermented) in immediate packings of a content not exceeding 3 kg	09021000	0%	5%	15%
Other green tea (not fermented)	09022000	0%	5%	15%
Black tea (fermented) and partly fermented tea, in immediate packings of a conte	09023000	0%	5%	15%
Other black tea (fermented) and other partly fermented tea	09024000	0%	5%	15%
Herbal Teas	09024000	0%	20%	15%
instant coffee	210112	0%	20%	15%
Coconut Oil				
Coconut oil and its fractions, whether or not refined, but not chemically modified (excl. crude)	151319000	0%	40%	15%
Crackers and Biscuits				
Biscuits, Unsweetened	19059010	0%	20%	15%
Bread, pastry, cakes, biscuits and other bakers wares, whether or not containing cocoa; communion wafers, empty cachets of a kind suitable for pharmaceutical use, sealing wafers, rice paper and similar products (excl. crispbread, gingerbread and the like, sweet biscuits, waffles and wafers with water content of <= 10%, rusks, toasted bread and similar toasted products) : Other	1905090	0%	20%	15%
Gluten Free	190120	0%	15%	15%
Breads/pancake/waffle mixes	190120	0%	15%	15%
Pancakes	190120	0%	15%	15%
Waffle Mixes	190120	0%	15%	15%
Sweeteners				
Sugar	17011490	0%	40%	15%
Raw cane sugar (excl. added flavouring or colouring) : Cane sugar for retail sale in packages of not more than 10kg	17011110	0%	40%	15%
Cane molasses resulting from the extraction or refining of sugar : Edible	17031020	0%	15%	15%
Syrups	170230	0%	5%	15%
Honey	04090000	40%	40%	15%

**Import Duties Sourced for Antigua & Barbuda, Barbados, St. Lucia & Trinidad & Tobago for the year 2013 from WTO at http://tariffdata.wto.org/default.aspx*

3.17.1.10. Price Control

Consumer Protection has been institutionalized in St. Lucia from as far back as 1970 with the commissioning of the Price Control and Supply Department, by the Ministry Trade and Industry. This department was mandated to control and monitor the prices and distribution of controlled goods as described within the Price Control Order. The order was comprised primarily of basic food items, school text books, cement and propane gas among others. Additionally, the department was responsible for the procurement of bulk rice, flour and sugar, a function it continues to perform.

Measures are also in place to protect local producers. As such, when there is a significant local producer operating in the marketplace, i.e.: Pasta, importers are required to purchase minimum quantities from local suppliers before the specified products can be imported.

3.17.2. Competitor & Trending Analysis

3.17.2.1. CARIFORUM

*	Baked Goods	Holiday Snacks Limited	Trinidad
*	Chocolate milk	Grace Kennedy	Jamaica
	Coconut Oil	CGA Limited	Trinidad
	Coconut Oil	TA's Trading	Trinidad
*	Crackers & Biscuit	WIBISCO	Barbados
*	Crackers & Biscuit	BGL Bermudez Group Ltd	Trinidad
	Crackers & Biscuit	BGL Bermudez Group Ltd	Trinidad
	Crackers & Biscuit, Sauces & Seasonings, Tea, Coffee	Caribbean Coffee House	Trinidad
*	Drinks	House of Angostura	Trinidad
*	Drinks, Sauces & Seasonings, Pepper Sauce, Coconut Milk	Grace Kennedy	Jamaica
*	Fruit Cheese	Associated Brands Industries Limited (ABIL)	Trinidad
	Fruit Cheese	Rumbrella Club Ltd	Trinidad
*	Herbal Teas	Caribbean Dream	Jamaica
*	Jam	National Canners Ltd	Trinidad
	James & Jellies, Rum Cakes	Andy Candy	Trinidad
	Juice	Bare Nutrition	Jamaica

	juices	VMC -Valley Manufacturing Co.	Belize
*	Juices	Grace Kennedy manufacturing	Jamaica
*	Juices	Nestle	Trinidad
*	Juices	S.M Jaleel & Co Ltd	Trinidad
*	Juices	Pine Hill Dairy	Barbados
*	Rum Cakes	Tortuga Rum Company	Cayman Islands
	Rum Cakes	Ma Etienne	Trinidad
*	Sauces & Chutney	Chief Brand Products	Trinidad
	Sauces & Seasonings	Native Treasures Inc	Barbados
*	Sauces & Seasonings	Eve	Jamaica
	Sauces & Seasonings	Armstrong Agencies Ltd	Trinidad
	Sauces & Seasonings	National Canners Ltd	Trinidad
	Seamoss Drink	Benjo's Food Products	Trinidad
	Syrups, Jams , Jellies, Sauces & Seasonings	National Canners Ltd	Trinidad

3.17.2.2. International

Country of Origin	Product Category	Manufactured by
Canada	Baked goods	Dare Foods
USA	Baked goods	Betty Crocker - General Mills
USA	Baked goods	IGA
USA	Baked goods	Toufayan Bakeries
USA	Chocolate jelly	ConAgra Foods
USA	Coffee	Wellsley Farms
Canada	Crackers & Biscuits	Dare Foods
Canada	Crackers & Biscuits	Dare Foods
Columbia	Crackers & Biscuits	Noel
USA	Crackers & Biscuits	Nabisco
USA	Drinks	SPI West Port
Canada	Herbal Teas	Red Rose Tea
London	Herbal Teas	Associated British Foods
Sri Lanka	Herbal Teas	Hanschell Inniss
USA	Herbal Teas	Bigelow Tea
USA	Herbal Teas, Coffee	The Tata Group

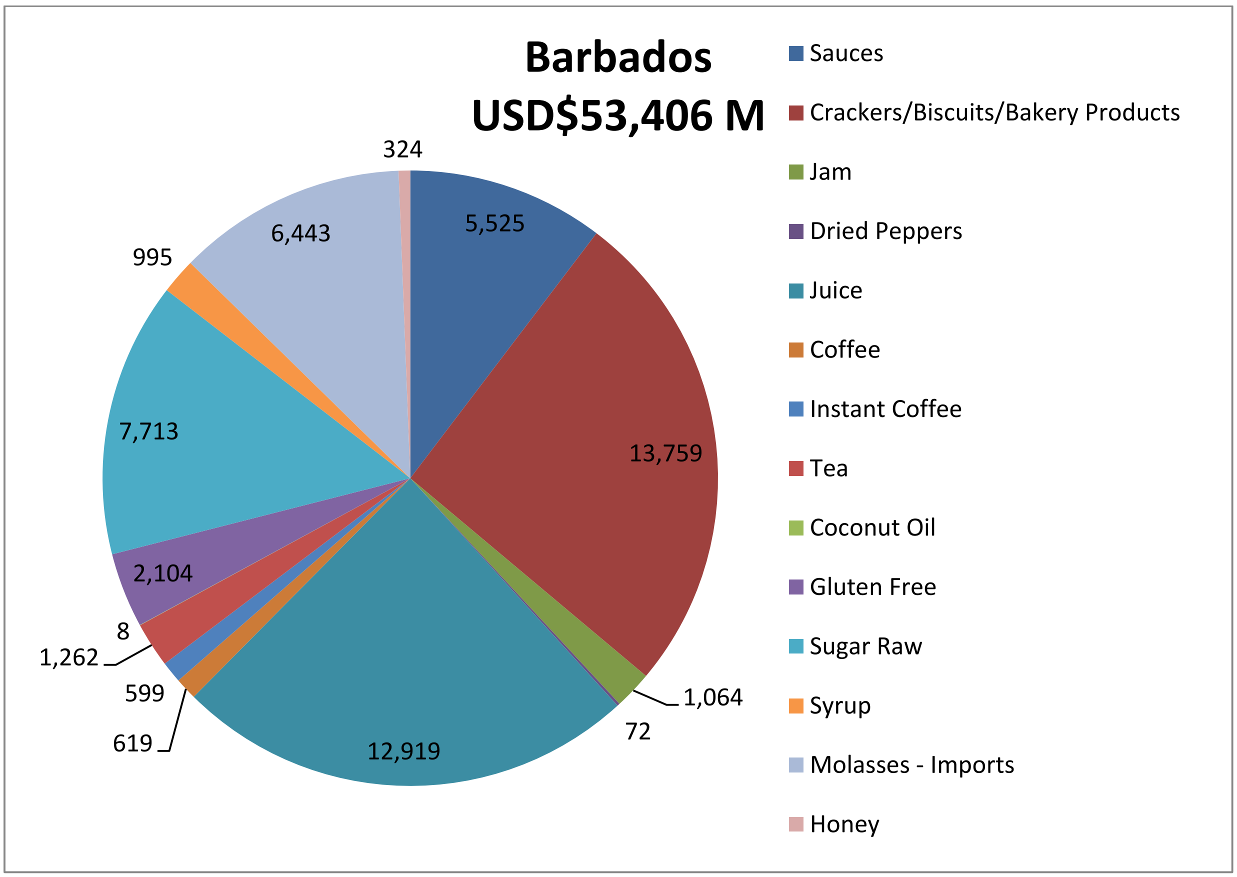
USA	Herbal/Fruit Teas	Unilever United States
United Kingdom	Jams & Jellies	J.M. Smucker Company
USA	Jams & Jellies, Juices, Sauces & Seasonings	Shurfine
United Kingdom	Jams & Jellies, Juices, Teas	John Lewis Partnership
Thailand	Jams & Jellies, Sauces & Seasonings	Sarach
USA	Jams & Jellies, Sauces & Seasonings	The Kraft Heinz Company
USA	Juice Concentrate	American Roland Food Corp
Canada	Juices	Tri Mark Food Brands Inc
Korea	Juices	OKF Corp.
Mexico	Juices	Kern's beverages
United Kingdom	Juices	Suntory Holdings Limited
USA	Juices	Apple & Eve L.L.C
USA	Juices	Apple & Eve L.L.C
USA	Juices	Del Monte Foods Inc
USA	Juices	Dr. Pepper Snapple Group
USA	Juices	Dr. Pepper Snapple Group
USA	Juices	Florida's Natural Growers
USA	Juices	Honest Tea
USA	Juices	KirkLand Signature
USA	Juices	Ocean Spray Cranberries Inc
USA	Juices	The Coca Cola Company
Thailand	Sauces and Seasonings	Sarach
United Kingdom	Sauces and Seasonings	H.J Heinz Company
United Kingdom	Sauces and Seasonings	Henderson William Brand
United Kingdom	Sauces and Seasonings	Mizkan Euro Ltd
USA	Sauces and Seasonings	ConAgra Foods
USA	Sauces and Seasonings	McCormick & Co. Inc
USA	Sauces and Seasonings	Rib Rack
USA	Syrups	Quaker Oats Company

3.17.3. Barbados

3.17.3.1. Country Overview

Historically, the Barbadian economy was dependent on sugarcane cultivation and related activities. However, in recent years the economy has diversified into light industry and tourism with about three-quarters of GDP and 80% of exports being attributed to services. The country enjoys of the highest per capita incomes in the region. Offshore finance and data services are significant foreign exchange earners and thrive from having the same time zone as eastern US financial centers and a relatively highly educated workforce. Barbados has a population of about 281,968.

3.17.3.2. Market Size



3.17.3.3. Other Market Considerations

There are a number of large manufactures in Barbados in the specialty food sector that are regional market leaders including Pine Hill Juices and Bermudez Biscuits. These companies had wide penetration through distributors in each of the four countries. Neither product had a market presence in the Bahamas.

3.17.3.4. Consumers Survey Results

These respondents shop about three times per week, visit approximately two stores and typically spend $220 per shopping trip. Nearly all, 97 percent, of the respondents were residents, the highest percentage of all countries.

Barbados respondents indicated they are somewhat more likely to purchase Caribbean products over international products, but not to the extent of respondents in St. Lucia and Trinidad and Tobago. They also think that it is somewhat important that products are produced in the Caribbean, do not really let a store's selection of Caribbean products impact where they shop and believe it is somewhat important that food products are produce locally.

Barbados's respondents were somewhat satisfied with their store's offerings of local and significantly more satisfied with the Caribbean product offerings. However, they were significantly more satisfied with international product offerings that either local or Caribbean offerings. This provides an opportunity for local and Caribbean food manufactures to enter the market due to less that satisfied product offerings.

These respondents were satisfied with the variety and range of products being offered in the nine product categories being studied. Seventy eight percent were satisfied indicating that there is some room for improvement that may be filled by local and Caribbean based products.
Barbados' respondents were significantly more satisfied with the selection of Caribbean products in the crackers, pepper sauce, and rum cake categories. They were similarly satisfied as their counterparts in other countries in the other product categories. Again, there is still significant room to increase satisfaction by increasing Caribbean product offering across all categories. They were the lease satisfied in the coffee, coconut oil, and gluten free categories.

These respondents appear to be more loyal to local products overall than other respondents. Roughly eighty percent or more of the respondents prefer local products in the studied categories. Only coffee, coconut oil and gluten free product categories received local preferences of 60 percent or less. Again, there is an opportunity to increase local and Caribbean sales in all categories, especially those just referenced.

Organic products are somewhat appealing as are fair trade products to these respondents. They are somewhat familiar with fair trade and somewhat likely to pay for that attribute, on average. They would be willing to recommend any of the Caribbean products described in the nine categories to friends and families.

Respondents strongly agree that Caribbean food products taste and flavor beat their international competitors. This agreement with this attribute was rated among the highest, only second to healthy products. Texture, packaging appearance, price and shelf life attributes has significantly less level of agreement in that Caribbean products beat their international competitors. It appears there are opportunities for Caribbean products to address a number of these product attributes to even better position themselves against their international competitors.

Overall, the respondents rated local products as being a better value than Caribbean or international products. The perceived value between both Caribbean and international products were rated very similarly. Again, this provides opportunities for local products as they are perceived to be a better value.

Price was rated as being very is important in choosing Caribbean produced products as is the product coming from a trust worthy manufacturer. However, price was less important here than in the other countries excluding Antiqua and Barbuda.

3.17.3.5. Supermarkets

Ranking	Store
M	CARLTON A1
L	CHANNELS
L	COST U LESS
M-L	EMERALD CITY
M-L	JORDAN SUPERMARKET
H-M	MASSEY STORES
M	PRICE MART
M	SHOPSMART INC.
L	THE PEOPLE'S MARKET
H=High End Price Point, M=Medium Price Point, L=Low Price Point	

3.17.3.6. Manufacturers Barbados

Product Type	Manufactured by	Dominant Brands
Baked Goods, Rum Cake	Bakers Choice Barbados	*
Baked Goods, Rum Cake	Benjerac Healthy Bake Inc	
Baked Goods, Rum Cake	Calypso Island Bakery	
Baked Goods, Rum Cake	Fosters Bakery	
Baked Goods, Rum Cake	Griffith C Arlette	
Baked Goods, Rum Cake	Lucy's Attic	
Baked Goods, Rum Cake, Other	Purity Bakeries Ltd	*
Baked Goods, Other	Eulinda Phillips	
Baked Goods, Other	Innocent Kookies	*
Bread	Caribbean Bakery	*
Chutney	Simmons Gourmet Products	
Chutney, Jams & Jellies, Sauces & Marinades, Syrups	Caribbean Treats Inc	*
Coconut Oil	Products By O	
Coconut Oil - Virgin	ACE Agro Matrix	
Coconut Water	Banks Barbados	*
Coffee	West Indian Coffee Co	

Coffee	Wyndhams CTL Inc	
Coffee, Sauces & Marinades	Ecaf Products Co Ltd	*
Crackers & Biscuits	O'Swell Inc	
Crackers & Biscuits	WIBISCO	*
Fruit Cheese	The Display Group Inc	
Fruit Cheese - Rum Balls, Sauces & Marinades	Native Treasures Inc	*
Gluten Free - Breadfruit Flour	Barbados Agricultural Development and Marketing Corporation	*
Gluten Free - Potato Flour, Coconut Flour	Products By O	*
Jams & Jellies	C&G Star trading	*
Jams & Jellies	Cornucopia Ltd	
Jams & Jellies	Kelly's Natural	
Jams & Jellies, Sauces & Marinades	Clejo's Enterprises Ltd	
Jams & Jellies, Sauces & Marinades	Massy Private Label	*
Juices	A.T Nichols Farm	
Juices	Barbados Dairy Industries Ltd	*
Juices	Big Face Productions & Associates	
Juices	Pine Hill Dairy	*
Juices	Sandie's Bottling Co	
Juices	Taste of Nature	
Juices - Seamoss	Lovemore Juices Inc	
Juices - Seamoss Concentrate	Country Side Enterprises	
Other baked goods	Zephrins Bakeries Inc	
Pepper Jelly, Sauces & Marinades, Syrups	Aunt May's Food Products	*
Sauces & Marinades	Bird's Nest Foods	
Sauces & Marinades	Beauty & General Supplies Inc	
Sauces & Marinades	Lionel's Sauces& Dressings	
Sauces & Marinades	MIS Products Ltd	
Sauces & Marinades	Neville A Edwards	
Sauces & Marinades	S. Forde	
Sauces & Marinades	Sitar Foods	
Sauces & Marinades	Sundale Foods Inc	
Sauces & Marinades, Syrups	Country Boy Foods Inc	
Sweeteners, Sugar	Hill Milling Co Ltd	
Sweeteners, Sugar	The West Indies Sugar & Trading company Ltd	*
Syrup	Mingues Enterprises	
Syrup	Shirltone Enterprises	

Syrup, Jams & Jellies	Rose & La Flamme Ltd	
Syrup, Jams & Jellies, Sauces & Marinades, Syrup	C&G Star trading	
Syrup, Sauces & Marinades	Delish Products Limited	*
Syrup, Sauces & Marinades	Jays Enterprises	
Syrup, Sauces & Marinades	Windmill Industries Ltd	

3.17.3.7. Importers/Distributors

ALAMAC MANUFACTURING CO. LTD

ARMSTRONG AGENCIES LTD	*
B&B DISTRIBUTION LTD	
BRYDENS & STOKES	*
GOODING ENTERPRISES LTD	
Hanschell Inniss	*
Massy Distribution	*
R. L. SEALE & CO.	
SBI DISTRIBUTION INC	
SPRING GARDEN FOODS INC.	
SUNDALE FOOD INC.	
TRIPLE D ENTERPRISES	

*** Dominant Players**

3.17.3.8. Regulatory Conditions

Packaging, Labelling and Food Safety standards are widely enforced and monitored by the Barbados Bureau of Standards (BSI). All manufactures must have their products accepted by the Bureau of Standards before they are sold. This can occur two ways, first the product is sent to BSI prior to shipment to ensure the labeling and packaging meet the country requirements. If this hasn't occurred inspectors will go to the warehouse where the product is being held in country and inspect it. There is typically a little forgiveness with this process, but it is best to certify the product before entering the country.

3.17.3.8.1. Duties and Taxes

Products	Code	Barbados		
		CARIFORUM Import Duty	WORLD Import Duty from the World	VAT
Sauces				
Pepper Sauce	21039010	0%	20%	17.5%
Pepper Jelly	20079990	0%	20%	17.5%
Chutney	21039090	0%	20%	17.5%
Jerk Sauce	21039090	0%	20%	17.5%
Marinades	21039090	0%	20%	17.5%
Bakery Products	1905	0%	20%	17.5%
Rum Cakes	19059010	0%	20%	17.5%
Other baked goods	1.906E+09	0%	20%	17.5%
Condiments				
Jams & Jellies	20079990	0%	20%	17.5%
Fruit Butters & Cheeses	20079940	0%	20%	
Confectionery pepper wines	21039090	0%	20%	17.5%
Dried Pepper	9041100	0%	40%	17.5%
Beverages				
Fruit Juices & Concentrates	2009	0%	40%	17.5%
Bottled Coconut Water	2009.8999	0%	20%	17.5%
Hot Beverages				
Coffee	901			
Coffee, roastedNot decaffeinated	09012100	0%	40%	17.5%
Coffee, roasted Decaffeinated	09012200	0%	40%	17.5%
Green tea (not fermented) in immediate packings of a content not exceeding 3 kg	09021000	0%	5%	17.5%
Other green tea (not fermented)	09022000	0%	5%	17.5%
Black tea (fermented) and partly fermented tea, in immediate packings of a conte	09023000	0%	5%	17.5%
Other black tea (fermented) and other partly fermented tea	09024000	0%	5%	17.5%
Herbal Teas	09024000	0%	20%	17.5%
instant coffee	210112	0%	20%	17.5%
Coconut Oil				
Coconut oil and its fractions, whether or not refined, but not chemically modified (excl. crude)	151319000	0%	40%	17.5%
Crackers and Biscuits				
Biscuits, Unsweetened	19059010	0%	20%	17.5%
Bread, pastry, cakes, biscuits and other bakers wares, whether or not containing cocoa; communion wafers, empty cachets of a kind suitable for pharmaceutical use, sealing wafers, rice paper and similar products (excl. crispbread, gingerbread and the like, sweet biscuits, waffles and wafers with water content of <= 10%, rusks, toasted bread and similar toasted products) : Other	1905090	0%	20%	17.5%
Gluten Free	190120	0%	15%	17.5%
Breads/pancake/waffle mixes	190120	0%	15%	17.5%
Pancakes	190120	0%	15%	17.5%
Waffle Mixes	190120	0%	15%	17.5%
Sweeteners				
Sugar	17011490	0%	40%	17.5%
Raw cane sugar (excl. added flavouring or colouring) : Cane sugar for retail sale in packages of not more than 10kg	17011110	0%	40%	17.5%
Cane molasses resulting from the extraction or refining of sugar : Edible	17031020	0%	15%	17.5%
Syrups	170230	0%	50%	17.5%
Honey	04090000	40%	40%	17.5%

*Import ***Duties Sourced for Antigua & Barbuda, Barbados, St. Lucia & Trinidad & Tobago for the year 2013 from WTO at http://tariffdata.wto.org/default.aspx***
*****VAT - http://www.tradingeconomics.com/barbados/sales-tax-rate***

3.17.4. Competitor and Trending Analysis

3.17.4.1. CARIFORUM

Product Category/type	Manufactured by	Country of Origin
Baked Good, Rum Cake	Tortuga Rum Company	Cayman Islands
Baked Goods, Bread	Caribbean Bakery	Jamaica
Chutney, Jams & Jellies	King Pepper Products Ltd	Jamaica
Chutney, Jams & Jellies, Sauces & Marinades	National Canners Ltd	Trinidad
Chutney, Sauces & Marinades	Chief Brand Products	Trinidad
Coconut Milk	Blue Mountain Coffee Jamaica	Jamaica
Coconut Oil	Bedessee Imports	Guyana
Coconut Oil - Pure	CGA	Trinidad
Coconut Oil, Sauces & Marinades	Prestige Manufacturing and Bottling Enterprise	Guyana
Coffee	Caribbean Coffee House	Trinidad
Crackers & Biscuits	BGL Bermudez Group Ltd	Trinidad
Crackers & Biscuits	Seprod Limited	Jamaica
Fruit Cheeses	Caribbean Treats Inc	Trinidad
Juices	Trade Winds Citrus Ltd	Jamaica
Juices - Seamoss, Sauces & Marinades	RHS Marketing Ltd	Trinidad
Juices, Coffee	Nestle	Trinidad
Juices, Drinks, Sauces & Marinades	Grace Kennedy manufacturing	Jamaica
Juices, Ice Tea	S M Jaleel	Trinidad
Sauces & Marinades	Aml/Walkerswood Ltd	Jamaica
Sauces & Marinades	F.A.M marketing	Guyana
Sauces & Marinades	Guyanese Pride	Guyana
Sauces & Marinades	Kavo	Guyana
Sauces & Marinades	King Pepper Products Ltd	Jamaica
Sweeteners - Sugar	The Guyana Sugar Corporation Inc	Guyana

3.17.4.2. International

Product Category	Country of Origin	Manufactured by
Chutney	United Kingdom	Premier Foods
Chutney, Coffee, Jams & Jellies, Juices, Sauces & Marinades, Sweeteners/Sugar, Honey	United Kingdom	John Lewis Partnership
Coconut - Butter	USA	The Hain Celestial Group

Coconut Cream	Puerto Rico	Coco Lopez Inc
Coconut milk	USA	American Roland Food corporation
Coconut milk	USA	Valrico Foods Inc/Massey Private Label
Coconut Milk, Sauces & Marinades	Thailand	Kodanmal Group Co Ltd
Coconut Oil	Malaysia	Bedessee Imports
Coconut Oil - Virgin	USA	BetterBody Foods
Coconut Oil - Virgin	USA	Nature's Way Products
Coconut Water	Thailand	Try It Coconut
Coconut Water, Milk, Honey	USA	Goya foods
Coffee	Columbia	Colcafe S.A.S
Coffee	Singapore	Food Empire Holdings Ltd
Coffee, Coconut Milk, Juices	Switzerland	Nestle
Crackers & Biscuits	USA	Mondelēz International and/or its affiliate(s)
Crackers & Biscuits	China	Asian Gourmet
Crackers & Biscuits	Switzerland	Associated British Foods
Crackers & Biscuits	United Kingdom	Burtons Biscuit Co
Crackers & Biscuits	USA	Nabisco
Crackers & Biscuits	United Kingdom	United Biscuits UK Limited
Crackers & Biscuits	Canada	Voortman Cookies Ltd
Gluten Free - Cakes & Cookies	USA	Betty Crocker - General Mills
Gluten Free - Pancakes & Baked Goods	Costa Rica	Nutrisol Vite Sa
Gluten Free, Spelt Flour, Pancakes, Sauces & Marinades	USA	The Hain Celestial Group Inc
Honey	USA	Sioux Honey Association
Honey	Canada	BeeMaid Honey
Honey	Canada	BillyBee Canada
Honey	USA	IGA Inc
Honey	USA	Private Label
Jams & Jellies	Scotland	Baxters Food Group
Jams & Jellies	USA	Island Snacks Inc
Jams & Jellies	USA	Mariani Packing Co Inc
Jams & Jellies	Canada	Thai United Food Trading Ltd

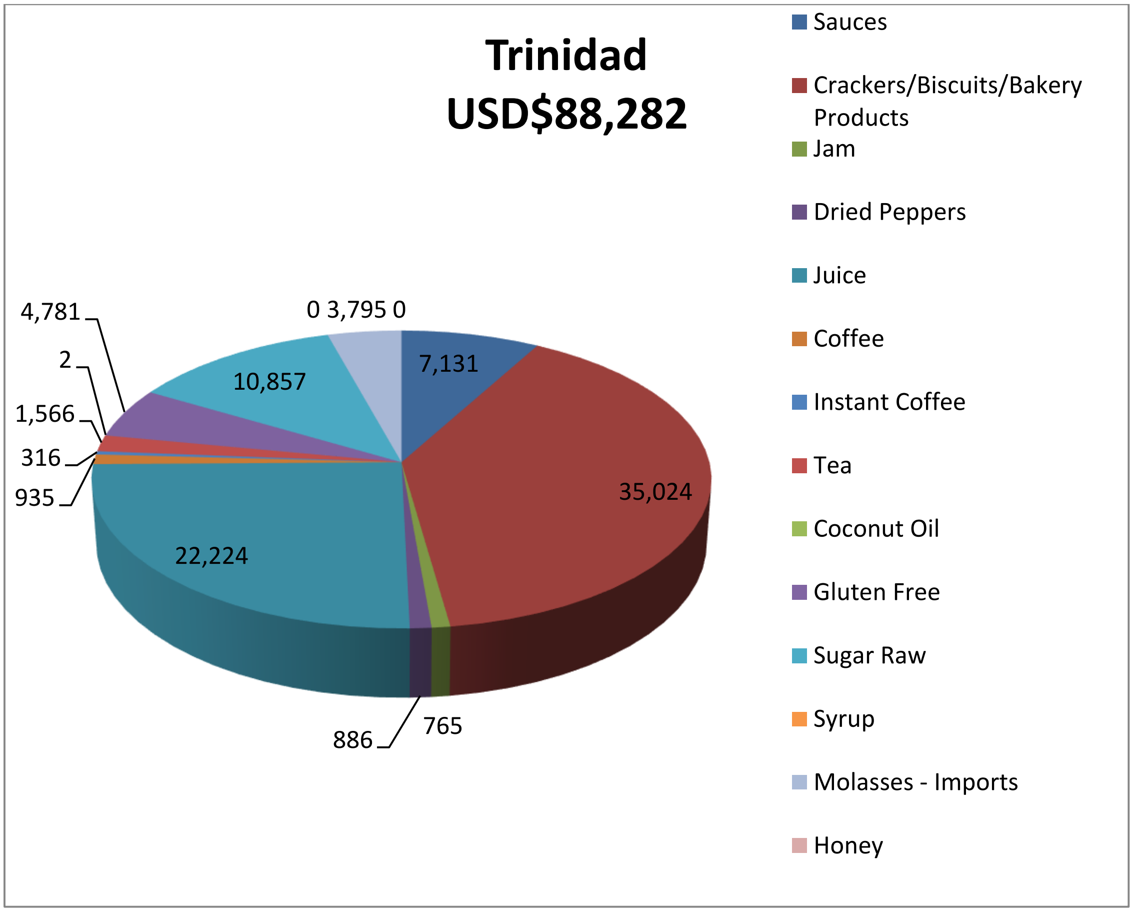
Jams & Jellies	USA	Welch's Food Inc
Jams & Jellies, Sauces & Marinades, Syrups	Canada	Loblaw Companies Ltd
Juice concentrate	United Kingdom	Sun Mark Limited
Juices	South Africa	Ceres Fruit Juices Pty Ltd
Juices	Turkey	Dimes
Juices	Turkey	Flavour Tech
Juices	Switzerland	Libby's Brand Holding
Juices	New Zealand	Nekta
Juices	USA	Ocean Spray Cranberries Inc
Juices	USA	Sunsweet Growers Inc
Juices	USA	Tampico Beverages Inc
Juices - Concentrate	USA	Staff
Juices, Drink	Korea	OKF Corp.
Sauces & Marinades	USA	Badia Spices
Sauces & Marinades	USA	Haddon House Food Products
Sauces & Marinades	USA	Mc Ilhenny Company
Sweetener	United Kingdom	Abram Lyle & Sons
Sweetener	USA	Domino Foods Inc
Sweetener	USA	Machala Natural Sweeteners
Sweetener	United Kingdom	Tate & Lyle Plc
Syrup - Pancake	USA	ACH Food Companies Inc
Syrup - Pancake	USA	Bay Valley Foods
Syrup - Pancake	Canada	Citadelle Maple syrup producers cooperative
Syrup - Pancake	USA	Guaker Oats Company
Tea	United Kingdom	Bovril Company
Teas - Herbal	Sri Lanka	Hanschell Inniss

3.17.5. Trinidad & Tobago

3.17.5.1. Country Overview

Trinidad and Tobago is one of the largest economies in the Caribbean, with a GDP of US$26, 8 billion. There are 1.34 million people as of 2013. The oil and gas sector contributes to almost half of the GDP and represents than two thirds of its merchandise exports. The economy continues to be severely affected by the continuing drop in energy prices with negative consequences for the government's budget. While this sector is suffering the specialty food sector seems to be flourishing. Exports where data is available shows a positive trend line to the region and internationally. That have dominate brands across the CARICOM region.

3.17.5.2. Market Size



3.17.5.3. Other Market Considerations

There are a number of large manufactures established manufactures that are regional market leaders in the specialty food sector in Trinidad and Tobago including Matouk's and BGL Bermudez Group Ltd**.** These companies had wide penetration through distributors in each of the four countries. Neither product had a market presence in the Bahamas.

3.17.5.4. Consumers Survey Summary

These respondents shop about three times per week, visit approximately two stores and typically spend $875 per shopping trip. Ninety five percent of the respondents were residents with the remaining five percent being visitors.

Trinidad and Tobago residents are significantly more likely than those in the other countries to purchase Caribbean products over international products, excluding St. Lucians. They also think it is very important that food is produced in the Caribbean, significantly more than other respondents excluding those from St. Lucia.

They do not really decide where to shop based on a store's selection of Caribbean products but think it is very important that food is produced locally. This suggests that there is a loyalty to Caribbean and local food products but it may not be significant enough to impact where they shop.

The respondents were somewhat satisfied with local product offerings and significantly more satisfied with Caribbean product offering from their store, but the level of satisfaction for these two categories was significantly less than observed in the international product offerings. This provides an opportunity for both local and Caribbean based food manufactures to expand their markets and provide products to this country.

These respondents were satisfied with the variety and range of products being offered in the nine product categories being studied. Seventy seven percent were satisfied indicating that there is some room for improvement that may be filled by local and Caribbean based products.
These respondents were significantly less satisfied than most of the respondents in the other countries with the selection of Caribbean products in the rum cakes and jams product categories. They were very satisfied with Caribbean selection of fruit juice, pepper sauces, and cracker product categories. There is significant room to increase satisfaction within all nine product categories by increasing the number of Caribbean products.

These respondents rated local number one higher overall in each of the nine product categories. The only category that had a local preference rating of less than 80 percent was in the cracker category. Again, these folks prefer local products followed by Caribbean products. Again, lots of opportunity to expand local and regional product offering.

Organic products are very appealing as are fair trade products to these respondents. They are somewhat familiar with fair trade but they are not willing to pay for that attribute, on average. They would be willing to recommend any of the Caribbean products described in the nine categories to friends and families.

Respondents to some degree agree that Caribbean food products have better taste, flavor and product appearance beat their international competitors. This agreement with this attribute was rated among the highest, only second to healthy products. Texture, price and shelf life attributes has significantly less level of agreement in that Caribbean products beat their international competitors. It appears there are opportunities for Caribbean products to address a number of these product attributes to even better position themselves against their international competitors.

Overall, the respondents rated local products as being a better value than Caribbean or international products. The perceived value between both Caribbean and international products were rated very similarly. Again, this provides opportunities for local products as they are perceived to be a better value.

Price was rated as being very is important in choosing Caribbean produced products as is the product coming from a trust worthy manufacturer. Interestingly, these respondents rated products being from trusted manufacturers significantly higher than respondents in other countries.

3.17.5.5. Supermarkets

Ranking	Store
L - M	Penny Savers Supermarket
H-M	Massy Stores
L-N	Price Mart
H-M	J.T.A. Supermarkets Limited
L-M	Price Club
M	Tru Value
M	Super Value

3.17.5.6. Manufacturers

Product Category	Manufactured by	Brand Leaders
Baked Goods	Holiday Snacks Limited	*
Baked Goods, Cakes	Kiss Baking Company Limited	*
Chutney, Jams & Jellies, Sauces & Marinades, Coconut Milk	National Canners Ltd	*
Chutney, Sauces & Marinades, Juices - Seamoss	RHS Marketing Ltd	*
Coconut Oil - Pure	CGA Limited	*
Coconut Water	World Coconut	*
Coffee	Hong Wing & Sons Limited	*
Coffee & Herbal Teas, Crackers & Biscuits, Sauces & Marinades, Fruit Cheeses, Jams & Jellies, Baked Goods, Other	Caribbean Coffee House	*
Coffee, Sauces - Chutney, Sauces & Marinades	Chief Brand Products	*

Crackers & Biscuits	Bermudez Biscuit Company	*
Crackers & Biscuits, Baked Goods - Other	BGL Bermudez Group Ltd	*
Drinks	House of Angostura	*
Fruit Cheese	Associated Brands Industries Limited (ABIL)	*
Jams & Jellies, Fruit Cheeses	Caribbean Treats (2010) Ltd	*
Juices, Coffee	Nestle	*
Juices, Ice Tea	S M Jaleel	*
Pepper Sauce, Sauces & Marinades	Perfect Peppers	*
Sauces - Chutney, Sauces & Marinades	Chatak Food Products	*
Sauces & Marinades	Habanero Pepper Sauce Co Ltd	*
Sweeteners	J.M.H Enterprise Limited	*
Sweeteners - Sugar	G.C.L	*
Baked Goods, Bread	Mamasan Home Products Ltd	
Baked Goods, Cakes	E&F Health Foods	
Baked Goods, Cakes	Kairos	
Baked Goods, Other	Nutrimix Flour Mills	
Baked Goods, Other	Trinidad Old Fashioned Cocoa Products	
Baked Goods, Rum Cake	L&S	
Baked Goods/Cake	Chef Bianca Bianco	
Chutney, Sauces & Marinades	Trini Flava	
Coconut Oil	TA's Trading	
Coconut Oil - Pure	GoPaul+Co Ltd	
Coconut Water	Jus Nuts	
Fruit Cheese, Juices	Rumbrella Club Ltd	
Fruit Cheeses	M.King	
Fruit Cheeses - Coconut Cream	Exquisite	
Fruit Cheeses - Coconut Cream	Tobago Town	
Honey	E. D'Andrade	
Honey	Tropical Forest Raw Honey	
Honey	Vibert & Ermine Enterprise Ltd	
James & Jellies, Rum Cakes	Andy Candy	

Juices	Brava International Ltd
Juices - Concentrate, Sauces & Marinades, Syrups	Dynamic Trinidad Tobago Ltd
Pepper Jellies, Sauces & Marinades	Ambrosia by Christine
Pepper Jellies, Sauces & Marinades	King & Queens
Pepper Jelly, Sauces - Chutney	Lilli Belle
Rum Cakes	Ma Etienne
Sauces & Marinades	Co Ltd Caribbean Specialty Foods
Sauces & Marinades	Agro Processing Ltd
Sauces & Marinades	Bertie's
Sauces & Marinades	CEADA Products Ltd
Sauces & Marinades	D'Farmer's Co Ltd
Sauces & Marinades	Flavour Me Rite
Sauces & Marinades	Granny
Sauces & Marinades	Hilda's Homemade
Sauces & Marinades	Jill's
Sauces & Marinades	JSAK Marketing
Sauces & Marinades	Mudda n' Law Foods
Sauces & Marinades	Opus ME Ltd
Sauces & Marinades	Roopa Contractors Ltd
Sauces & Marinades	Seego Fine Foods
Sauces & Marinades	Tamarind Amchar
Sauces & Marinades	The House of Authentic Hot Sauces
Sauces & Marinades	Tobago Sauce Company
Sauces & Seasonings	Armstrong Agencies Ltd
Seamoss Drink	Benjo's Food Products
Seamoss Concentrate	Cavalier
Sweeteners	Blanchefield & Co
Sweeteners	Happi Products Ltd
Sweeteners	Nizams
Sweeteners - Sugar	ADM Distributors

3.17.5.7. Importers/Distributors

Dominant Players	Importers & Distributors
*	A.S. Bryden & Sons (T'dad) Ltd.
*	Bryden PI Limited
*	C.Yip Choy Baillie Ltd.
*	Food Basket Int'l
*	Hadco Limited
*	Massy Distributors
*	Peppercorns
	Adam's Bagels
	ADM - Arima Discount Mart
	ADM Import Export
	Alrogo Enterprises Ltd.
	Alstons Marketing Company Limited (AMCO)
	Bloom's Imports
	Delta Trading Co. Ltd
	Malabar Farms
	NAISA
	The Gourmet Genie
	The Happy Gourmet
	Vanilla Bean Gourmet Store

3.17.5.8. Regulatory Conditions

There is zero acceptance of honey in the market. It is advisable to send a sample of a new imported product to the governing regulator prior to selling into the market. This process can take 3 to 6 months depending on the back log and complexity of the product.

3.17.5.8.1. Duties and Taxes

Products	Code	Trinidad CARIFORUM Import Duty	Trinidad WORLD Import Duty
Sauces			
Pepper Sauce	21039010	0%	20%
Pepper Jelly	20079990	0%	20%
Chutney	21039090	0%	20%
Jerk Sauce	21039090	0%	20%
Marinades	21039090	0%	20%
Bakery Products	1905	0%	20%
Rum Cakes	19059010	0%	20%
Other baked goods	1905909090	0%	20%
Condiments			
Jams & Jellies	20079990	0%	20%
Fruit Butters & Cheeses	20079940	0%	20%
Confectionery pepper wines	21039090	0%	20%
Dried Pepper	9041100	0%	40%
Beverages			
Fruit Juices & Concentrates	2009	0%	40%
Bottled Coconut Water	2009.8999	0%	20%
Hot Beverages			
Coffee	901		
Coffee, roastedNot decaffeinated	09012100	0%	40%
Coffee, roasted Decaffeinated	09012200	0%	40%
Green tea (not fermented) in immediate packings of a content not exceeding 3 kg	09021000	0%	5%
Other green tea (not fermented)	09022000	0%	5%
Black tea (fermented) and partly fermented tea, in immediate packings of a conte	09023000	0%	5%
Other black tea (fermented) and other partly fermented tea	09024000	0%	5%
Herbal Teas	09024000	0%	20%
instant coffee	210112	0%	20%
Coconut Oil			
Coconut oil and its fractions, whether or not refined, but not chemically modified (excl. crude)	151319000	0%	40%
Crackers and Biscuits			
Biscuits, Unsweetened	19059010	0%	20%
Bread, pastry, cakes, biscuits and other bakers wares, whether or not containing cocoa; communion wafers, empty cachets of a kind suitable for pharmaceutical use, sealing wafers, rice paper and similar products (excl. crispbread, gingerbread and the like, sweet biscuits, waffles and wafers with water content of <= 10%, rusks, toasted bread and similar toasted products) : Other	1905090	0%	20%
Gluten Free	190120	0%	15%
Breads/pancake/waffle mixes	190120	0%	15%
Pancakes	190120	0%	15%
Waffle Mixes	190120	0%	15%
Sweeteners			
Sugar	17011490	0%	40%
Raw cane sugar (excl. added flavouring or colouring) : Cane sugar for retail sale in packages of not more than 10kg	17011110	0%	40%
Cane molasses resulting from the extraction or refining of sugar : Edible	17031020	0%	15%
Syrups	170230	0%	5%
Honey	04090000	40%	40%

*Import ***Duties Sourced for Antigua & Barbuda, Barbados, St. Lucia & Trinidad & Tobago for the year 2013 from WTO at http://tariffdata.wto.org/default.aspx***
*****VAT - http://www.tradingeconomics.com/barbados/sales-tax-rate***

3.17.5.9. Market Opportunities

3.17.5.10. Competitor and Trending Analysis

3.17.5.11. CARIFORUM

Country of Origin	Product Category/type	Manufactured by
Barbados	Crackers & Biscuits	WIBISCO
Barbados	Crackers & Biscuits	WIBISCO
Jamaica	Fruit Cheeses - Coconut Cream	Wray & Nephew Ltd
Grenada	Jams & Jellies, Syrups	De La Grenada Industries Ltd
Barbados	Juices	Pine Hill Dairy
Barbados	Juices	Pine Hill Dairy
St Lucia	Sauces & Marinades	Caribbean Brands
Jamaica	Sauces & Marinades, Coconut Milk, Coconut Oil - Virgin, Coconut Water, Juices, Sauces & Marinades	Grace Kennedy
Jamaica	Spices & seasonings	Caribbean Coffee House
Guyana	Sweeteners - Sugar	The Guyana Sugar Corporation Inc

3.17.5.12. International

Country of Origin	Product Category	Manufactured by
USA	Baked Goods, Cakes	Betty Crocker - General Mills
USA	Baked Goods, Other	Pillsbury Company
USA	Baked Goods, Other	Pinnacle Foods Corp LLC
USA	Coconut Gel	Phil Am Merchandising Inc
Thailand	Coconut Milk	Asiatic Agro Industry Co Ltd
Thailand	Coconut Milk	Jamaica Bahamas Imports
United Kingdom	Coconut Milk	Grace Foods UK Ltd
USA	Coconut milk	American Roland Food corporation
Brazil	Coconut Water	Ducoco Alimentos e Bebidas
USA	Coconut Water	Conchita Foods Inc

Switzerland	Coffee	Nestle
United Kingdom	Coffee	Red Mountain Coffee
USA	Coffee	The Folger Coffee Company
USA	Concentrate	B&G Foods Inc
Cyprus	Concentrate juices	L. Zotiades Trading & Consulting Ltd
Mexico	Concentrate juices	Grupo Jumex, S.A. de C.V.
USA	Crackers	Keebler Company
Malaysia	Crackers & Biscuits	Lee Biscuits PTV Ltd
United Kingdom	Crackers & Biscuits	United Biscuits
USA	Crackers & Biscuits	Mondelez International
USA	Crackers & Biscuits	NABISCO
Thailand	Drinks	Vara Food & Drink Co Ltd
USA	Drinks	Atlantis Paradise Island
London	Herbal Teas	Associated British Foods
	Herbal Teas	iHerb
Canada	Honey	BillyBee Canada
USA	Honey	Sioux Honey Association
USA	Honey	John Paton Inc
Philippines	Jams & Jellies	Coles Pinoy Sweet Treats
Scotland	Jams & Jellies	Baxters Food Group
United Kingdom	Jams & Jellies	Chiver's & Sons
United Kingdom	Jams & Jellies	Robertson's
USA	Jams & Jellies	Borden Dairy Company
USA	Jams & Jellies	The J.M Smucker Co.
Thailand	Jams & Jellies, Sauces & Marinades, Coconut Water	Jamaica Bahamas Imports
USA	Jams & Jellies, Sweeteners - Sugar	Shurfine
Switzerland	Juices	Libby's Brand Holding
USA	Juices	Bluebird
USA	Juices	Bolthouse Farm Juices
USA	Juices	Campbell Soup Company
USA	Juices	Delight Beverages Co
USA	Juices	Hornell BrewingCo Inc
USA	Juices	Indian Summer Inc
USA	Juices	Johanna Foods Inc
USA	Juices	Ocean Spray Cranberries LLC
USA	Juices	PepsiCo
	Juices	TD Brands
USA	Juices, Jams & Jellies	Dr Pepper Snapple Group
USA	Pepper Jelly	Robert Rothschild farm

Philippines	Sauces & Marinades	Jufran
Philippines	Sauces & Marinades	Mang Tomas
Thailand	Sauces & Marinades	Thep Padung Porn Coconut Co Ltd.
United Kingdom	Sauces & Marinades	Premier Foods
USA	Sauces & Marinades	Southeastern Mills Inc
USA	Sauces & Marinades	Trappey's Fine Foods Inc
USA	Sauces & Marinades, Coffee	Kraft Food Groups Inc
USA	Sauces & Marinades, Syrups - Pancake, Honey, Coffee	Fed Group
Canada	Sweeteners - Sugar	Lantic Sugar Ltd & Rogers Sugar Ltd
USA	Sweeteners - Sugar	Cumberland Packing Corp
USA	Sweeteners - Sugar	First Choice
Canada	Sweeteners - Syrups	L.B Maple Treat Corp
USA	Syrups - Pancake, Baked Goods - Other	Quaker Oats Company
USA	Teas	Unliver
USA	Teas, Green & Herbal	Bigelow Tea

3.17.6. The Bahamas

3.17.7. Country Overview

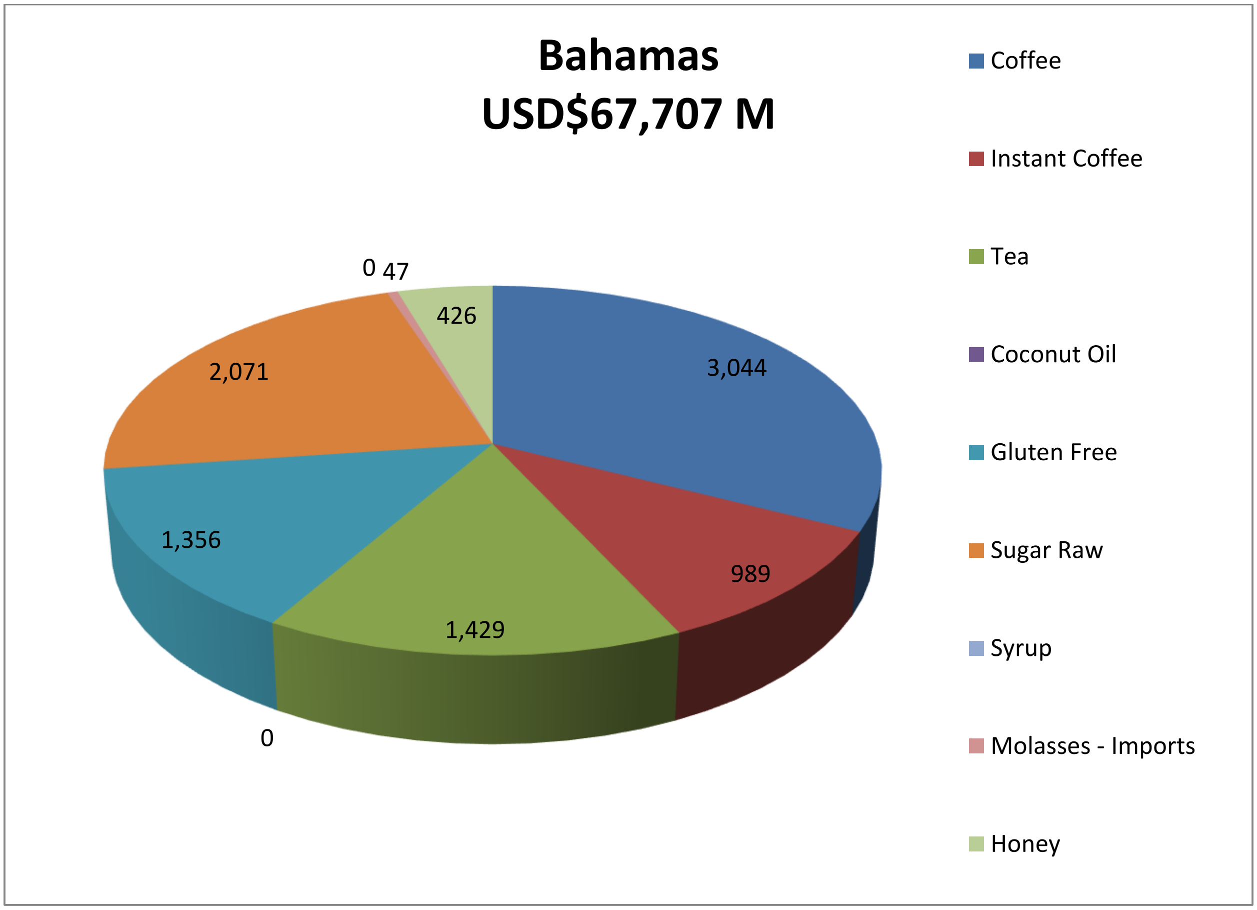
Bahamas has the third largest GDP per head in the Americas, US$ 30,900, following the United States and Canada as cited by the International Trade Centre. The economy is strongly tied to the tourist industry, and as such was severely impacted during the recession. The economy now is much improved and jobs related to tourism have increased, such as construction of new facilities and financial services to support tourism and development. Furthermore the country has implemented a VAT tax to stabilize its budget. To diversify its economy the country has supported and developed an export oriented plastics and organic chemicals industry. They currently represent the majority of Bahamian exports, along with fish products.

The Bahamas is a member of CARIFORUM and is currently in the process of fulfilling all of the obligations within the treaty. With the latest agreement for CARIFORUM EPA EU Agreement the local legislation has past and an office was established to work on the transition. This is moving forward at an acceptable pace according to the European Union.

There are few specialty food manufacturers in the Bahamas which include Tortuga's bakery and two local pepper sauces. One firm acting as a private label has a considerable breath of Caribbean product under their brand. There is an opportunity to invest in the specialty food sector to increase local production and capture market share both at the retail level and at the gift shops targeting tourist. There were no products from The Bahamas seen on any shelves in the study area.

The packaging and labeling for the smaller producers is lacking. There are very few requirements enforced as evidenced from the products on the shelves in the grocery stores or tourist centers. The products carried at the resorts are of a higher level of packaging, but are missing key components such as nutritional facts as are other producers.

3.17.8. Market Size



3.17.9. Consumers

These respondents shop about three times per week, visit approximately two stores and typically spend $155 per shopping trip. Eighty five percent of the respondents were residents while 15 percent were visitors. This is the second highest level of visitors in the respondent sample following St. Lucia.

The Bahamian respondent's sentiments regarding local and Caribbean produced products mimicked the finding found in both Barbados and Antiqua and Barbuda. They sometimes purchase Caribbean products over international products but think Caribbean production of foods is important as is locally produced food. These respondents do not really shop according to a store's selection of Caribbean food products.

The Bahama respondents were the most satisfied of all the respondents with local food product offerings. Their level of satisfaction with local and Caribbean based products were very similar to each other and this was the only country where this occurred. They were satisfied with international product offering at their store. There is opportunity here for both local and Caribbean based products.

These respondents were satisfied with the variety and range of products being offered in the nine product categories being studied. Sixty eight percent were satisfied indicating that there significant room for improvement that may be filled by local and Caribbean based products.
These respondents were significantly less satisfied than most of their counterparts with the sugar and coffee categories. Their level of satisfaction across all categories suggests that there is room to increase satisfaction by including more Caribbean based products in all nine product categories. This is especially true in the coconut oil and gluten free categories.

Bahama respondents were varied in their responses. They prefer local for rum cakes, fruit juices, coconut oil, sugar, and pepper sauce categories. They preferred international brands over Caribbean in Jams, coffee, crackers and gluten free product categories. There is room to introduce new local and Caribbean products in the various categories, especially those mentioned where international products are preferred.

Organic products are very appealing as are fair trade products to these respondents. They are familiar with fair trade and would be willing to pay for that attribute, on average. They would be very willing to recommend any of the Caribbean products described in the nine categories to friends and families.

Respondents strongly agree that Caribbean food products taste and flavor beat their international competitors. This agreement with this attribute was rated among the highest, only second to healthy products. Packaging appearance, price and shelf life attributes has significantly less level of agreement in that Caribbean products beat their international competitors. It appears there are opportunities for Caribbean products to address a number of these product attributes to even better position themselves against their international competitors.

Overall, the respondents rated local products as being a better value than Caribbean or international products. The perceived value between both Caribbean and international products were rated very similarly. Again, this provides opportunities for local products as they are perceived to be a better value. This is especially true in the cracker, gluten free, and coffee product segments.

Price was rated as being very is important in choosing Caribbean produced products as is the product coming from a trustworthy manufacturer.

3.17.10. Supermarkets

Supermarket	Ranking
Solomon's Super Center - Nassau	H-M
Super Value Food Stores Limited,	M - L
Butlers Food World	M - L
Solomon's Freeport	H-M
Abaco Markets Ltd.	M - L
Solomon's Fresh Market	H
Thompson Wholesale	M - L
John Chen	L
Budget Mart	L
Xtra Value	M - L
Cost Right	L
Chea Meat Mart	L

3.17.11. Manufacturers

Product Category	Manufactured by
Baked Goods - Rum Cakes	Tortuga
Coconut Water	Bahama Food Services
Jams & Jellies	Bahamas Gourmet
Jams & Jellies, Sauces & Marinades	D'Vanya's
Sauces & Marinades	Atlantis Paradise Island
Sauces & Marinades	Branded Sauces
Sauces & Marinades	Sawyers Food Products Ltd
Sauces & Marinades	V&V's

3.17.12. Importers/Distributors

Importers & Distributors	Dominant Players
Bahamas Food Services	*
D'Albena's Agency Ltd.	*
Island Wholesale	*
Jamaica Bahamas Imports	*
Thompson Trading Co. Ltd	*
Asa H Pritchard Ltd.	
Butler Milo & Son Wholesale Warehouse	
Island Seafood Ltd.	

3.17.13. Regulatory Conditions

Currently the Bahamas is in the process of fully implementing the EPA accord for CARIFORUM. Currently tariffs comprise over 10% of the national budget in the Bahamas. As the Bahamas has changed their tax code and implemented a VAT this percentage is anticipated to diminish providing an easier implementation path for tariff reduction specified in the CARIFROM-EPA Agreement with the EU. Specifically for the Bahamas the prime trading area is for Haiti and the Dominican Republic.

Source: Monitoring the Implementation o& Results of the CARIFORUM-EU EPA Agreement. September 2014 at http://trade.ec.europa.eu/doclib/docs/2014/october/tradoc_152824.pdf

3.17.13.1. Duties and Taxes

Products	Code	Bahamas CARIFORUM Import Duty	Bahamas WORLD Import Duty	VAT
Sauces				
Pepper Sauce	21039010	20%	20%	15%
Pepper Jelly	20079990	20%	20%	15%
Chutney	21039090	20%	20%	15%
Jerk Sauce	21039090	20%	20%	15%
Marinades	21039090	20%	20%	15%
Bakery Products	1905	40%	40%	15%
Rum Cakes	19059010	0%	0%	15%
Other baked goods	1905909090	40%	40%	15%
Condiments				
Jams & Jellies	20079990	10%	10%	15%
Fruit Butters & Cheeses	20079940	10%	10%	15%
Confectionery pepper wines	21039090	10%	10%	15%
Dried Pepper	9041100	10%	10%	15%
Beverages				
Fruit Juices & Concentrates	2009	10%	10%	15%
Bottled Coconut Water	2009.8999	10%	10%	15%
Hot Beverages				
Coffee	901			
Coffee, roastedNot decaffeinated	09012100	0%	0%	15%
Coffee, roasted Decaffeinated	09012200	0%	0%	15%
Green tea (not fermented) in immediate packings of a content not exceeding 3 kg	09021000	0%	0%	15%
Other green tea (not fermented)	09022000	0%	0%	15%
Black tea (fermented) and partly fermented tea, in immediate packings of a conte	09023000	0%	0%	15%
Other black tea (fermented) and other partly fermented tea	09024000	0%	0%	15%
Herbal Teas	09024000	30%	30%	15%
instant coffee	210112	20%	20%	15%
Coconut Oil				
Coconut oil and its fractions, whether or not refined, but not chemically modified (excl. crude)	151319000	40%	40%	15%
Crackers and Biscuits				
Biscuits, Unsweetened	19059010	0%	0%	15%
Bread, pastry, cakes, biscuits and other bakers wares, whether or not containing cocoa; communion wafers, empty cachets of a kind suitable for pharmaceutical use, sealing wafers, rice paper and similar products (excl. crispbread, gingerbread and the like, sweet biscuits, waffles and wafers with water content of <= 10%, rusks, toasted bread and similar toasted products) : Other	1905090	40%	40%	15%
				15%
Gluten Free	190120	40%	40%	15%
Breads/pancake/waffle mixes	190120	40%	40%	15%
Pancakes	190120	40%	40%	15%
Waffle Mixes	190120	40%	40%	15%
Sweeteners				
Sugar	17011490	0%	0%	15%
Raw cane sugar (excl. added flavouring or colouring) : Cane sugar for retail sale in packages of not more than 10kg	17011110	0%	0%	15%
Cane molasses resulting from the extraction or refining of sugar : Edible	17031020	30%	30%	15%
Syrups	170230	30%	30%	15%
Honey	04090000	35%	35%	15%

Import Duties Sourced for Antigua & Barbuda, Barbados, St. Lucia & Trinidad & Tobago for the year 2013 from WTO at http://tariffdata.wto.org/default.aspx and from speaking with a customs officer regarding not implementing the CARICOM harmonized tariffs.

*****Import Duties Sourced for the Bahamas for 2013 from Market Access Map at http://www.macmap.org***

3.17.14. Market Opportunities

There currently is a demand for Caribbean flavors in the Bahamas from the tourist trade and the local population. One local brand that has success as private label is Bahamas Jamaica Brand products. They procure a large variety of products under private label to sell in the local market. The main issue for the Bahamas is to overcome the logistics of sending product affordably to the market.

For firms located in the Bahamas there is a greater opportunity to sell to the local market and meet local demand in a variety of categories including jams, sauces, honey, herbal teas, and roasted coffee. At the International Airport and at Atlantis there were only a few specialty food products that are produced locally in the sauce category and in the bakery category there was just Tortuga Rum Cakes. In the other categories there seems to be a local and tourist demand for high quality jams, roasted whole coffee beans, and herbal teas. Targeting the tourist areas and the higher end grocery stores such as Solomon’s should provide local produces market opportunities.

The full implementation of CARIFORUM EPA EU agreement provides a single tariff for CARIFORUM members. As was quoted Minister of Financial Services Ryan Pinder said March 19, 2013 “There is considerable potential for growth in trade with the CARIFORUM region, as currently only approximately three per cent of our imports and exports originate and are destined for the region,” In addition he said “The successful implementation of the EPA throughout our public service, and ultimately private sector, will cause for growth opportunities in trade for Bahamians and Bahamian businesses, charting a new path of economic empowerment.”

3.17.15. Competitor and Trending Analysis

3.17.15.1. CARIFORUM

Country of Origin	Product Category	Manufactured by
Trinidad	Juice Concentrate	House of Angostura
Trinidad	Juices	S.M Jaleel & Co Ltd
Trinidad	Pepper Sauce, Sauces & Marinades, Jams & Jellies	National Canners Ltd
Jamaica	sauces	Taste of the Caribbean
Jamaica	Sauces & Marinades	Grace Kennedy
Jamaica	Sauces & Marinades	Taste of the Caribbean
Jamaica	Teas	Blue Mountain Coffee Jamaica

3.17.15.2. International

Country of Origin	Product Category	Manufactured by

USA	Baked Goods, Cakes	Betty Crocker - General Mills
USA	Baked Goods, Other	Pillsbury Company
USA	Baked Goods, Other	Pinnacle Foods Corp LLC
USA	Coconut Gel	Phil Am Merchandising Inc
Thailand	Coconut Milk	Asiatic Agro Industry Co Ltd
Thailand	Coconut Milk	Jamaica Bahamas Imports
United Kingdom	Coconut Milk	Grace Foods UK Ltd
USA	Coconut milk	American Roland Food corporation
Brazil	Coconut Water	Ducoco Alimentos e Bebidas
USA	Coconut Water	Conchita Foods Inc
Switzerland	Coffee	Nestle
United Kingdom	Coffee	Red Mountain Coffee
USA	Coffee	The Folger Coffee Company
USA	Concentrate	B&G Foods Inc
Cyprus	Concentrate juices	L. Zotiades Trading & Consulting Ltd
Mexico	Concentrate juices	Grupo Jumex, S.A. de C.V.
USA	Crackers	Keebler Company
Malaysia	Crackers & Biscuits	Lee Biscuits PTV Ltd
United Kingdom	Crackers & Biscuits	United Biscuits
USA	Crackers & Biscuits	Mondelez International
USA	Crackers & Biscuits	NABISCO
Thailand	Drinks	Vara Food & Drink Co Ltd
USA	Drinks	Atlantis Paradise Island
London	Herbal Teas	Associated British Foods
	Herbal Teas	iHerb
Canada	Honey	BillyBee Canada
USA	Honey	Sioux Honey Association
USA	Honey	John Paton Inc
Philippines	Jams & Jellies	Coles Pinoy Sweet Treats
Scotland	Jams & Jellies	Baxters Food Group
United Kingdom	Jams & Jellies	Chiver's & Sons
United Kingdom	Jams & Jellies	Robertson's
USA	Jams & Jellies	Borden Dairy Company
USA	Jams & Jellies	The J.M Smucker Co.
Thailand	Jams & Jellies, Sauces & Marinades, Coconut Water	Jamaica Bahamas Imports
USA	Jams & Jellies, Sweeteners - Sugar	Shurfine
Switzerland	Juices	Libby's Brand Holding
USA	Juices	Bluebird
USA	Juices	Bolthouse Farm Juices

USA	Juices	Campbell Soup Company
USA	Juices	Delight Beverages Co
USA	Juices	Hornell Brewing Co Inc
USA	Juices	Indian Summer Inc
USA	Juices	Johanna Foods Inc
USA	Juices	Ocean Spray Cranberries LLC
USA	Juices	PepsiCo
	Juices	TD Brands
USA	Juices, Jams & Jellies	Dr Pepper Snapple Group
USA	Pepper Jelly	Robert Rothschild farm
Philippines	Sauces & Marinades	Jufran
Philippines	Sauces & Marinades	Mang Tomas
Thailand	Sauces & Marinades	Thep Padung Porn Coconut Co Ltd.
United Kingdom	Sauces & Marinades	Premier Foods
USA	Sauces & Marinades	Southeastern Mills Inc
USA	Sauces & Marinades	Trappey's Fine Foods Inc
USA	Sauces & Marinades, Coffee	Kraft Food Groups Inc
USA	Sauces & Marinades, Syrups - Pancake, Honey, Coffee	Fed Group
Canada	Sweeteners - Sugar	Lantic Sugar Ltd & Rogers Sugar Ltd
USA	Sweeteners - Sugar	Cumberland Packing Corp
USA	Sweeteners - Sugar	First Choice
Canada	Sweeteners - Syrups	L.B Maple Treat Corp
USA	Syrups - Pancake, Baked Goods - Other	Quaker Oats Company
USA	Teas	Unliver
USA	Teas, Green & Herbal	Bigelow Tea

4. Product Overview

4.1. Sauces

4.1.1. Marinades, Sauces and Seasonings

Research found 330 products in the region that belong to this category. Trinidad had the most products in this category accounting for 46 percent of the identified products. Barbados's products accounted for 15 percent of the identified products in the region.

Chief and Matouk's both out of Trinidad each had 19 identifiable products accounting for 12% of the entire product category.

Sauces always provide an opportunity across the region, but the flavors need to be unique but familiar to the local population. In addition branding and pricing strategy will need to be extremely focused to gain and maintain market share. One area in the sauce market that has not had a Caribbean producer is in the salad dressing sector. This is a prime opportunity to provide an alternative local product to the current offerings. It is a unique market opportunity that will require food scientist to assist with appropriate recipes.

Marinades and Sauces are seen across price points and across flavors. The Barbeque market is dominated by international brands. There is a market for CARIFORUM producers to move into this product segment utilizing exotic fruit flavors. Barbados and Trinidad are dominating shelf space in this category. Utilizing the recipes of the fruit flavored syrups, these concepts can be transitioned to create new products in the BBQ sauce category.

Many regional producers are manufacturing concentrate drinks for the traditional "add water" market. Given the high sugar content of these drinks, it is highly suggested that these products are converted for use in BBQ sauces.

4.1.2. CARIFORUM Producers

Manufacturer	Country of Origin	Product Type
Amanda's	Barbados	Sauces & Marinades
Aunt May's	Barbados	Sauces & Marinades
Bali Kitchen	Barbados	Sauces & Marinades
Caribbean Treats	Barbados	Sauces & Marinades
Chatak	Barbados	Sauces & Marinades
Country Boy	Barbados	Sauces & Marinades
Delish	Barbados	Sauces & Marinades
Ecaf	Barbados	Sauces & Marinades
G Star Foods	Barbados	Sauces & Marinades
HOME	Barbados	Sauces & Marinades
Sitar's	Barbados	Sauces & Marinades
Super blend	Barbados	Sauces & Marinades
Superb Blend	Barbados	Sauces & Marinades
Windmill	Barbados	Sauces & Marinades
Cooks Delite	Guyana	Sauces & Marinades
Guyanese Pride	Guyana	Sauces & Marinades
VKM Brand	Guyana	Sauces & Marinades
Grace Kennedy	Jamaica	Sauces & Marinades
Walkerswood	Jamaica	Sauces & Marinades
Caribbean Brands	St Lucia	Sauces & Marinades
Baron	St. Lucia	Sauces & Marinades
Ambrosia	Trinidad	Sauces & Marinades
Bertie's	Trinidad	Sauces & Marinades

Caribbean Specialty Foods	Trinidad	Sauces & Marinades
Caribbean Spices	Trinidad	Sauces & Marinades
Chief	Trinidad	Sauces & Marinades
Chief	Trinidad	Sauces & Marinades
D'Farmer's	Trinidad	Sauces & Marinades
FMR	Trinidad	Sauces & Marinades
Golden Delight	Trinidad	Sauces & Marinades
Karibbean Flavours	Trinidad	Sauces & Marinades
Kennedy's	Trinidad	Sauces & Marinades
King & Queens	Trinidad	Sauces & Marinades
Matouks's	Trinidad	Sauces & Marinades
Roopas	Trinidad	Sauces & Marinades
Seigo	Trinidad	Sauces & Marinades
Trini Flava	Trinidad	Sauces & Marinades
Turban	Trinidad	Sauces & Marinades
West Indian	Trinidad	Sauces & Marinades
MM	Jamaica	Sauces & Marinades, Brown
Grandma Aki	Antigua & Barbuda	Sauces & Marinades, Fruit Flavored
Baron Foods	St. Luca	Sauces & Marinades, Green
Frootsy	St. Lucia	Sauces & Marinades, Green
Viking	St. Lucia	Sauces & Marinades, Green
Jus Rite	Trinidad	Sauces & Marinades, Green
JSAK	Trinidad	Sauces & Marinades, Green
Lionel's	Barbados	Sauces, BBQ Sauce
Mabel	Trinidad	Sauces, BBQ Sauce
MP	Trinidad	Sauces, BBQ Sauce
Swiss	Trinidad	Sauces, BBQ Sauce

4.1.2.1. Leading International Brands

Manufacturer	Country of Origin	Product Type
Presidents Choice	Canada	Sauces & Marinades
Kitchens of India	India	Sauces & Marinades
Salca Italia	Italy	Sauces & Marinades
Geeta	London	Sauces & Marinades

National Foods	Pakistan	Sauces & Marinades
Mang Tomas	Philippines	Sauces & Marinades
Nando's	South Africa	Sauces & Marinades
Regal Thai	Thailand	Sauces & Marinades
Super Soup	Thailand	Sauces & Marinades
Carib Herb	Trinidad	Sauces & Marinades
A1 Marinade	United Kingdom	Sauces & Marinades
Blue Dragon	United Kingdom	Sauces & Marinades
Heinz	United Kingdom	Sauces & Marinades
HP	United Kingdom	Sauces & Marinades
Patak's	United Kingdom	Sauces & Marinades
Sarsons	United Kingdom	Sauces & Marinades
Sharwoods	United Kingdom	Sauces & Marinades
Waitrose	United Kingdom	Sauces & Marinades
Badia	USA	Sauces & Marinades
Hunts	USA	Sauces & Marinades
Roland	USA	Sauces & Marinades
Shurfine	USA	Sauces & Marinades
Spice World	USA	Sauces & Marinades
Stubb's	USA	Sauces & Marinades
Gold Sun	China	Sauces & Marinades
Mae Ploy	Thailand	Sauces & Marinades
Kraft	USA	Sauces & Marinades, BBQ
Rib Rack	USA	Sauces & Marinades, BBQ

4.1.2.2. Other Sauces & Marinades

Preparations for sauces and prepared sauces; mixed condiments and seasonings (excl. soya sauce, tomato ketchup and other tomato sauces, mustard, and mustard flour and meal): Pepper sauce HS210390

	2009	2010	2011	2013
Antigua & Barbuda	2084		2062	1932
Bahamas		9702	10743	12404
Barbados	4986		5525	6318
St. Lucia		306	647	
Trinidad & Tobago		3823	7131	20654
Total	7070	13831	26108	41308

Denoted in thousands USD

4.1.2.2.1. CARIFORUM Producers

Manufacturer	Country of Origin	Product Type
Eve	Jamaica	Sauces, Ketchup
Matouks's	Trinidad	Sauces, Ketchup
MP	Trinidad	Sauces, Ketchup
Mabel	Trinidad	Sauces, Ketchup
Mabel	Trinidad	Sauces, Ketchup
Mabel	Trinidad	Sauces, Ketchup
Matouks's	Trinidad	Sauces, Ketchup
Swiss	Trinidad	Sauces, Ketchup
Mabel	Trinidad	Sauces, Ketchup
Mabel	Trinidad	Sauces, Mayonnaise

4.1.2.2.2. Leading International Brands

Manufacturer	Country of Origin	Product Type
TACO Bell	USA	Sauces, Salsa
Old El Paso	USA	Sauces, Salsa
Heinz	USA	Sauces, Ketchup
Hellman's	USA	Sauces, Mayonnaise
National Foods	Pakistan	Sauces, Ketchup

4.1.2.3. Pepper Sauces

The basic pepper sauce market is saturated with local, regional and international brands. The packaging ranges anywhere from basic and poor labelling to very sophisticated packages and labels. Exotic fruit to include coconut flavored pepper sauces are an emerging trend and would create new opportunities for local and regional producers. There were major pepper sauce producers in each of the study countries. There does not appear to be any great opportunity for exporting pepper sauce regionally unless the products are unique and present new niche opportunities. Locals tend to favor local brands. Few international players were seen in this category. Many international brands are producing pepper sauces, copy cats of Caribbean Brands. In most cases, the packaging is on par with regional producers and often better.

4.1.2.3.1. CARIFORUM Producers

Brand	Country of Origin	Product Type
Denis	Antigua & Barbuda	Sauces, Pepper Sauce
Vangee's Flavours & Delights	Antigua & Barbuda	Sauces, Pepper Sauce
D'Vanya	Bahamas	Sauces, Pepper Sauce
Pepper Sauce	Bahamas	Sauces, Pepper Sauce
Amanda's	Barbados	Sauces, Pepper Sauce
Aunt May's	Barbados	Sauces, Pepper Sauce
Barbados Pepper Sauce	Barbados	Sauces, Pepper Sauce
Country Boy	Barbados	Sauces, Pepper Sauce
Delish	Barbados	Sauces, Pepper Sauce
Ecaf	Barbados	Sauces, Pepper Sauce
Forde's	Barbados	Sauces, Pepper Sauce
G Star Foods	Barbados	Sauces, Pepper Sauce
Grandma's Traditional	Barbados	Sauces, Pepper Sauce
HOME	Barbados	Sauces, Pepper Sauce
Hurricane Pepper Sauce	Barbados	Sauces, Pepper Sauce
Lionel's	Barbados	Sauces, Pepper Sauce
Native Treasures	Barbados	Sauces, Pepper Sauce
The Bird's Nest	Barbados	Sauces, Pepper Sauce
Windmill	Barbados	Sauces, Pepper Sauce
Kavo's	Guyana	Sauces, Pepper Sauce

Eaton’s	Jamaica	Sauces, Pepper Sauce
Grace Kennedy	Jamaica	Sauces, Pepper Sauce
MM	Jamaica	Sauces, Pepper Sauce
Walkerswood	Jamaica	Sauces, Pepper Sauce
Baron	St. Lucia	Sauces, Pepper Sauce
Frootsy	St. Lucia	Sauces, Pepper Sauce
M&T	St. Lucia	Sauces, Pepper Sauce
Prosperity Foods	St. Lucia	Sauces, Pepper Sauce
St. Lucian	St. Lucia	Sauces, Pepper Sauce, Fruit
Viking Trader	St. Lucia	Sauces, Pepper Sauce
Tobago	Tobago	Sauces, Pepper Sauce
Chief	Trinidad	Sauces, Pepper Sauce
Chief	Trinidad	Sauces, Pepper Sauce
Circle Branches	Trinidad	Sauces, Pepper Sauce
Habanero	Trinidad	Sauces, Pepper Sauce
Hall's	Trinidad	Sauces, Pepper Sauce
Hilda's Homemade	Trinidad	Sauces, Pepper Sauce
Jill's	Trinidad	Sauces, Pepper Sauce
JSAK	Trinidad	Sauces, Pepper Sauce
Karibbean Flavours	Trinidad	Sauces, Pepper Sauce
King & Queens	Trinidad	Sauces, Pepper Sauce
Margery	Trinidad	Sauces, Pepper Sauce
Matouk's	Trinidad	Sauces, Pepper Sauce
MP	Trinidad	Sauces, Pepper Sauce
Mudda n' Law	Trinidad	Sauces, Pepper Sauce
Perfect Peppers	Trinidad	Sauces, Pepper Sauce
Roopa's	Trinidad	Sauces, Pepper Sauce
Turban	Trinidad	Sauces, Pepper Sauce

4.1.2.3.2. Leading International Brands

Manufacturer	Country of Origin	Product Type
JBL	Thailand	Sauces, Pepper Sauce
Mc Ilhenny Tobasco	USA	Sauces, Pepper Sauce
Hy-Top	USA	Sauces, Pepper Sauce
Louisiana	USA	Sauces, Pepper Sauce
Trappey's	USA	Sauces, Pepper Sauce
Tropical Pepper Co	USA	Sauces, Pepper Sauce

4.1.2.4. Pepper Jellies

Pepper Jellies are in limited supplies from a few dominate local and regional producers on the shelves. New exotic fruit flavors to include coconut could present new opportunities for CARIFORUM producers. Pepper Jellies are in limited supply and growing in market share.

4.1.2.4.1. CARIFORUM Producers

Manufacturer	Country of Origin	Product Type
Rasta Bahama	Bahamas	Sauces, Pepper Jelly
Aunt May's	Barbados	Sauces, Pepper Jelly
Kelly's natural	Barbados	Sauces, Pepper Jelly
Winfresh	St. Lucia	Sauces, Pepper Jelly
Ambrosia	Trinidad	Sauces, Pepper Jelly
Lilli Belle	Trinidad	Sauces, Pepper Jelly
Matouks's	Trinidad	Sauces, Pepper Jelly

4.1.2.4.2. Leading International Brands

Manufacturer	Country of Origin	Product Type
Robert Rothschild	USA	Sauces, Pepper Jelly

4.1.2.5. Chutneys

Chutneys seem to have the largest market share in Trinidad and Tobago. Few Chutney products were found on the shelves in the other study markets. This product is largely used by Indians where there are vast arrays of curry dishes. The market opportunities for this product is Trinidad & Tobago, Guyana, Barbados and where there are large Indian populations.

There are only four countries that were identified as having Chutney products in the Caribbean and there were a total of 27 products found. Trinidad had the most with 18 products, significantly more than either Barbados (5) or the United Kingdom with (1). There was only one Jamaican chutney product found during this project.

One quarter of the Chutney products are mango flavored.

4.1.2.5.1. CARIFORUM Producers

Manufacturer	Country of Origin	Product Type
Caribbean Treats	Barbados	Sauces, Chutney
Simmons	Barbados	Sauces, Chutney
Sitar's	Barbados	Sauces, Chutney
Eaton's	Jamaica	Sauces, Chutney
Chatak	Trinidad	Sauces, Chutney
Chief	Trinidad	Sauces, Chutney
Flavours World	Trinidad	Sauces, Chutney
Karibbean Flavours	Trinidad	Sauces, Chutney
Lilli Belle	Trinidad	Sauces, Chutney
Matouks's	Trinidad	Sauces, Chutney
Trini Flava	Trinidad	Sauces, Chutney

4.1.2.5.2. Leading International Brands

Brand	Country of Origin	Product Type
Sharwoods	United Kingdom	Sauces, Chutney
Waitrose	United Kingdom	Sauces, Chutney

4.1.2.6. Jerk Sauces

Jerk Sauces are produced mainly in Jamaica, Barbados and Trinidad. Grace Kennedy is the market leader in this category. The market is saturated in this category and consumers tend to favor products from Jamaica in this category, primarily because Jerk is a well-known Jamaican dish.

4.1.2.6.1. CARIFORUM Producers

Manufacturer	Country of Origin	Product Type
Amanda's	Barbados	Sauces, Jerk
Aunt May's	Barbados	Sauces, Jerk
Country Boy	Barbados	Sauces, Jerk
Delish	Barbados	Sauces, Jerk
G Star Foods	Barbados	Sauces, Jerk
Eaton's	Jamaica	Sauces, Jerk
Grace Kennedy	Jamaica	Sauces, Jerk
Maison Creole	Jamaica	Sauces, Jerk
Spur Tree	Jamaica	Sauces, Jerk
Karibbean Flavours	Trinidad	Sauces, Jerk
Matouks's	Trinidad	Sauces, Jerk

4.1.2.6.2. International Producers

No International products were seen in this category indicating buyer's loyalty to CARIFORUM brands.

4.2. Bakery Products

4.2.1. Summary

Further examination by product reveals that there are a number of companies operating in the various categories. There were 60 different baked products identified in the region. Trinidad and Tobago had 30 baked products in the region, by far the largest number. Barbados had 16 companies that supplied baked goods to the region. Combined, the products hailing from these two countries accounted for 76 percent of all the identified regional baked products. Most of the products were freshly baked with limited shelf life.

Interestingly, even in Trinidad and Barbados, no one manufacturer emerged as the industry leader. For example, when examining baked goods, there are 31 different manufacturers in this product category and only three that control a significant amount of the market with regard to product placement. Kiss out of Trinidad and Tobago has a line of six dessert baked good products. Barbados has 2 products that were identified in the region, Purity bagels and rock cake. The United

States has five products in the region from Toufayan. These include products such as bagels and wraps. Interestingly, there does not appear to be a dominant baked goods manufacturer in the region as it appears each country has a variety of baked product manufacturers.

Baked goods is a competitive market with each country having its own local bakery producing cakes, breads and other national foods. There are also some large regional players in the market. On the positive there seems to be a growing demand for these products and a niche for new firms. A company will need to have a highly finished product that can compete in this price sensitive market in order to different itself on shelf.

Unless shelf life can be managed to facilitate exports, regional exports will be limited at best.

Global Imports of Bread, pastry, cakes, biscuits and other bakers' wares, whether or not containing cocoa; communion wafers, empty cachets of a kind suitable for pharmaceutical use, sealing wafers, rice paper and similar products				
	2009	**2010**	**2011**	**2013**
Antigua and Barbuda	4498		3925	4047
Bahamas		21007	24308	31454
Barbados	8841		10787	11587
Saint Lucia		2528	2521	
Trinidad and Tobago		16187	17057	
Total	13339	39722	58598	47088

***Denoted in thousands USD**

4.2.2. Rum Cakes

Rum cakes are produced by three leading CARIFORUM producers. All others appear to be cottage/artisanal producers. Rum cakes are on supermarket shelves and in tourist trap outlets. This is often a great gift for visitors to bring home to friends and family. Producers are urged to ensure that the products are well distributed in tourist shopping locations. Packaging and product positioning are essentials for success. No international products were seen in this category hence the region has the competitive edge.

4.2.2.1. CARIFORUM Producers

Manufacturer	Country of Origin	Product Type
Calypso	Barbados	Baked Goods, Rum Cake
Bounty Rum Cake	St. Lucia	Baked Goods, Rum Cake
Andy Candy	Trinidad	Baked Goods, Rum Cake
Trinite	Trinidad	Baked Goods, Rum Cake, Truffles

Caribbean Rum Cake	Trinidad	Baked Goods, Rum Cake
Antigua & Barbuda Rum Cake	Antigua & Barbuda	Baked Goods, Rum Cake
Ma Etienne	Trinidad	Baked Goods, Rum Cake
L & S	Tobago	Baked Goods, Rum Cake

4.2.3. Other similar baked goods

A number of cottage/artisanal producers were seen on the shelves in limited supply at best. Packaging was basic with limited shelf life. This product category is mostly dominated by local producers. Some frozen baked goods items are coming from international sources. There is an opportunity for local producers to consider hard dough bread because of its unique characteristics and limited suppliers in each country. Frozen bagels and cake mixes were dominated by international brands.

Pastries – With large multinationals and a large local producer it will be hard to gain a foothold in this market. The larger firms will have a price advantage and economies of scale strongly in their favor

4.2.3.1. CARIFORUM Producers

Manufacturer		Product Type
Zephrins	Barbados	Baked Goods, Bread
Nutrimix	Trinidad	Baked Goods, Bread
Boulangerie Grisol	Canada	Baked Goods, Bread
Wonder	Barbados	Baked Goods, Bread
Toufayan	USA	Baked Goods, Bread
Purity	Barbados	Baked Goods, Bread, Bagels
Kingston 10	Barbados	Baked Goods, Bread, Hard Dough
Jamaican	Jamaica	Baked Goods, Bread, Hard Dough
Dolcie's	Antigua & Barbuda	Baked Goods, Cakes
Bakers Choice	Barbados	Baked Goods, Cakes
Barbados Rum Cake	Barbados	Baked Goods, Cakes
Benjerac	Barbados	Baked Goods, Cakes
CG	Barbados	Baked Goods, Cakes

Fosters Bakery	Barbados	Baked Goods, Cakes
Great Cake	Barbados	Baked Goods, Cakes
Rosies Sweet & Treats	Barbados	Baked Goods, Cakes
E&F	Tobago	Baked Goods, Cakes
Kairos	Tobago	Baked Goods, Cakes
Kiss	Trinidad	Baked Goods, Cakes
Kiss	Trinidad	Baked Goods, Cakes
Kiss Cakes	Trinidad	Baked Goods, Cakes
Bianca Bianco	Trinidad	Baked Goods, Cakes
Eulinda's	Barbados	Baked Goods, Cookies
Kooki'es Kookie	Barbados	Baked Goods, Cookies
Trinidad old fashioned	Trinidad	Baked Goods, Other
Mamasan	Trinidad	Baked Goods, Rolls

4.2.3.2. Leading Other Brands

Tortuga	Cayman Islands	Baked Goods, Rum Cake
GFS	USA	Frozen Baked Goods

4.3. Condiments:

4.3.1. Summary

There were 101 products identified in this category in the region. The majority of these products are manufactured in Trinidad (36%), followed by Barbados (17%) and the United States (14%). Together they account for nearly two-thirds of the jams and jelly products identified in the study.

St. Lucia and the United Kingdom both had eight products in the region but there were different companies producing them.

Jams – there is a high consumption of jam in the local market as it was prevalent on the shelves not only locally, but high end international brands. A local or regional product with a high level of fruit content may find an opening in this market.

In the Bahamas and Barbados, both of these populations had a variety of jams on the shelves at different price levels. It will take a keen branding and pricing strategy to position the product in each of these countries to gain and maintain market share. This includes a guava jam that is only regionally produced in the market.

There is stiff competition coming from International brands that are often priced and packaged better than local goods. It would appear that Caribbean consumers seem to have a pallet for local and international brands equally but expect the Caribbean products to have the same taste and quality. Often the local and regional products in this category look rudimentary on the supermarket shelves and are in dire need of repackaging.

4.3.2. Jams & Jellies

Imports of Jams, fruit jellies, marmalades, fruit or nut purée and fruit or nut pastes, obtained by cooking, whether or not containing added sugar or other sweetening matter HS 2007				
	2009	**2010**	**2011**	**2013**
Antigua & Barbuda	244		238	265
Bahamas		966	852	1051
Barbados	1021		962	979
St. Lucia		31	24	
Trinidad & Tobago		819	563	
TOTAL	1265	1816	2639	2295

***Denoted in thousands USD**

4.3.2.1. CARIFORUM Producers

Manufacturer	Country of Origin	Product Type
Nicole's Table	Antigua & Barbuda	Jams & Jellies
D'Vanya	Bahamas	Jams & Jellies
Guava Gourmet	Bahamas	Jams & Jellies
HOME	Barbados	Jams & Jellies
Caribbean Treats	Barbados	Jams & Jellies
R&L	Barbados	Jams & Jellies
G Star Foods	Barbados	Jams & Jellies
Amanda's	Barbados	Jams & Jellies
Morne Delice	Grenada	Jams & Jellies
Irie Jam	St. Lucia	Jams & Jellies

Ma St Rose Creole Delight	St. Lucia	Jams & Jellies
Frootsy	St. Lucia	Jams & Jellies
M&T	St. Lucia	Jams & Jellies
Matouks's	Trinidad	Jams & Jellies
Andy Candy	Trinidad	Jams & Jellies
Elle's	Trinidad	Jams & Jellies
Kelly's Natural	Barbados	Jams & Jellies, Marmalade
Mabel	Trinidad	Jams & Jellies, Marmalade

4.3.2.2. **Leading International Brands**

Manufacturer	Country of Origin	Product Type
Baxters	Scotland	Jams & Jellies
JBL	Thailand	Jams & Jellies
Toffee	Thailand	Jams & Jellies
Quezon's	Philippines	Jams & Jellies
Swiss Miss	USA	Jams & Jellies
Goya	USA	Jams & Jellies
IGA	USA	Jams & Jellies
Shurfine	USA	Jams & Jellies
Borden	USA	Jams & Jellies
Welchs	USA	Jams & Jellies
Smuckers	USA	Jams & Jellies
Jell-o	USA	Jams & Jellies
Smucker's	USA	Jams & Jellies
Waitrose	United Kingdom	Jams & Jellies
Hartley's	United Kingdom	Jams & Jellies
Crosse and Blackwell	United Kingdom	Jams & Jellies
Essential Waitrose	United Kingdom	Jams & Jellies
Chiver's	United Kingdom	Jams & Jellies

Robertson's	United Kingdom	Jams & Jellies
Bonne Maman	France	Jams & Jellies
Presidents Choice	Canada	Jams & Jellies, Marmalade
Eaton's	Jamaica	Jams & Jellies, Marmalade

4.4. Fruit Butters and Cheeses

There were eight of these products using indigenous confections identified in the region. Trinidad manufacturers produced five of the nine products with Barbados producing three. Trinite from Trinidad produced three of that country's rum candies while Native Treasures produced two out of the three identified in Barbados. Two products were fudge products without rum, one was produced in Barbados and one in St. Lucia. These sweet products are primarily purchased by locals for visiting nationals. The products for the most part are poorly packaged and scattered in baskets and on hanging racks. There is significant potential for these products to move in larger volumes are strategically placed tourist locations. A market potential exists for this product category. Products were seen in all study countries. There are also market opportunities for dried fruit which blends well into the heathy snack category.

Interesting squeeze packs were seen on the shelves from International brands. These packaged products were positioned for the baking market as fruit toppings for cakes and desserts. CARIFORUM producers can convert some of these concepts using indigenous fruits such as guava and mango packed uniquely to cross over to this market segment.

4.4.1. CARIFORUM Producers

Brand	Country of Origin	Product Type
I&M	Trinidad	Fruit Butter & Cheeses, Dried Fruit
M&T	St. Lucia	Fruit Butter & Cheeses, Tamarind Balls
Andy Candy	Trinidad	Fruit Butters & Cheeses
Semaj	Barbados	Fruit Butters & Cheeses, Dried Fruit
Caribbean Treats	Trinidad	Fruit Butters & Cheeses, Dried Fruit
Paula's	Trinidad	Fruit Butters & Cheeses, Dried Fruit
Chop Sticks	Trinidad	Fruit Butters & Cheeses, Dried Fruit
Mawusi's	Trinidad	Fruit Butters & Cheeses, Dried Fruit
Sunshine Snacks	Trinidad	Fruit Butters & Cheeses, Dried Fruit
Traditional Island Fudge	St. Lucia	Fruit Butters & Cheeses, Fudge

Native Treasures	Barbados	Fruit Butters & Cheeses, Ginger Fudge
Old Fashioned Barbados Confectionary	Barbados	Fruit Butters & Cheeses, Guava Cheese
Native Treasures	Barbados	Fruit Butters & Cheeses, Guava Cheese
Native Treasures	Barbados	Fruit Butters & Cheeses, Rum Balls
Caribbean Rum Balls	Trinidad	Fruit Butters & Cheeses, Rum Balls
Trinite	Trinidad	Fruit Butters & Cheeses, Rum Balls
A Taste of the Islands	Barbados	Fruit Butters & Cheeses, Rum Fudge

4.4.2. Leading International Brands

Brand	Country of Origin	Product Type
Tortuga	**Cayman Islands**	**Fruit Butters & Cheeses, Rum Balls**
Tricopilia	**Costa Rica**	**Fruit Butters & Cheeses, Fruit Cheese**
Mariani	**USA**	**Fruit Butters & Cheeses, Dried Fruit**
Welch's	**USA**	**Fruit Butters & Cheeses, Dried Fruit**
Island Snacks	**USA**	**Fruit Butters & Cheeses, Dried Fruit**
Aroy-D	**Canada**	**Fruit Butters & Cheeses, Dried Fruit**

4.4.3. Pepper wines – no significant presence was noted.

4.4.4. Dried pepper – seen packed in bags, displayed on hanging racks. No significant presence was noted.

4.5. Beverages

4.5.1. Summary

Global Imports of Exports of Fruit juices (including grape must) and vegetable juices, unfermented and not containing added spirit, whether or not containing added sugar or other sweetening matter HC2009			
	2010	2011	2013
Antigua and Barbuda	0	2379	0
Bahamas	18829	19131	18135
Barbados	0	6114	5261

St. Lucia	1878	2356	0
Trinidad & Tobago	14536	17531	0
Total	35243	47511	23396

There appears to be three countries that account for the majority of non-hot drinks and juices sold in the region. Thirty-eight percent of the drinks originated from Trinidad and Tobago. In Trinidad and Tobago alone, there are 63 juice products found in the region. The regional products are well packaged and well presented, using a combination of Tetra Pack, PET bottles, easy dispensers, easy closures, wide size ranges, great taste and excellent quality. The United States was the next largest supplier of juice to the area with 44 juice products being identified. Barbados drink products accounted for approximately 12 percent of the products found in the area.

These companies had a variety of products that they supplied but there are a number of different companies supplying drink products to the region. These three countries supplied 159 out of 222 drink products identified in the region. This equates to approximately 72 percent of all drink non-hot drink products.

With large regional producers seen on the shelves in all study countries, there is little opportunity for a small producer to enter this product category successfully.

Seamoss drinks are in high demand in the Region. Few companies are producing a well packaged stable product. Supplies are low and demand is high. There is a market opportunity for beverage producers to enter this market segment.

There are few Ice Tea producers in the region. Shelves were filled with International products indicating that there is demand for these products. A market opportunity presents itself for producers able to convert "bush teas" into refreshing all natural beverages.

Many regional producers are manufacturing concentrate drinks for the traditional "add water" market. Given the high sugar content of these drinks, it is highly suggested that these products are converted for use as cocktails at bars or even converted to BBQ sauces.

4.5.2. CARIFORUM Products

Brand	Country of Origin	Product Type
Roma Cocoa	Jamaica	Beverages, Chocolate Milk
Nesquik	Trinidad	Beverages, Chocolate Milk
Supligen	Trinidad	Beverages, Chocolate Milk
Windmill	Barbados	Beverages, Concentrate
Angostura	Trinidad	Beverages, Concentrate
Fresh Start	Trinidad	Beverages, Concentrate
Mabel	Trinidad	Beverages, Concentrate, Mauby

Caribbean Cool	Trinidad	Beverages, Concentrate, Mauby
Seamoss	Barbados	Beverages, Concentrate, Seamoss
D-69	Barbados	Beverages, Concentrate, Seamoss
Karibbean Flavours	Trinidad	Beverages, Concentrate, Seamoss
Cavalier	Trinidad	Beverages, Concentrate, Seamoss
G Star Foods	Barbados	Beverages, Drink
Grace Kennedy	Jamaica	Beverages, Drink
Angostura	Trinidad	Beverages, Drink
Boom	Jamaica	Beverages, Energy Drink
Island Fusion	Trinidad	Beverages, Ice Tea
Pinehill	Barbados	Beverages, Juice
Sandie's	Barbados	Beverages, Juice
Taste of Nature	Barbados	Beverages, Juice
Suntwist	Barbados	Beverages, Juice
Jacob's Juice Fusions	Barbados	Beverages, Juice
Tru Juice	Jamaica	Beverages, Juice
Grace Kennedy	Jamaica	Beverages, Juice
Origin of Jamaica	Jamaica	Beverages, Juice
Viking	St. Lucia	Beverages, Juice
Twist	Trinidad	Beverages, Juice
Orchards	Trinidad	Beverages, Juice
Fruta	Trinidad	Beverages, Juice
Trinidad Fresh	Trinidad	Beverages, Juice
Trinidad Orange Juice	Trinidad	Beverages, Juice
Tampico	Trinidad	Beverages, Juice
Caribbean Cool	Trinidad	Beverages, Juice
Mabel	Trinidad	Beverages, Juice
Stretch	Trinidad	Beverages, Juice
Everlee	Trinidad	Beverages, Juice
Trinidad Fresh	Trinidad	Beverages, Juice
Fruta	Trinidad	Beverages, Juice
G Star Foods	Barbados	Beverages, Juice Concentrate
Baron	St. Lucia	Beverages, Juice Concentrate
Viking Traders	St. Lucia	Beverages, Juice Concentrate

Fresh Cane Juice	Barbados	Beverages, Juice, Cane
Golden Delight	Trinidad	Beverages, Juice, Concentrate
MP	Trinidad	Beverages, Mauby
Seamoss	Antigua & Barbuda	Beverages, Seamoss
Lovemore	Barbados	Beverages, Seamoss
Sweet Hen	St. Lucia	Beverages, Seamoss
Benjo's Seamoss	Dominica/Trinidad	Beverages, Seamoss
Lasco	Jamaica	Beverages, Soy Drink

4.5.3. Leading International Brands

Brand	Country of Origin	Product Type
Citrus Valley	Belize	Beverages, Juice
Caribbean Pride	Belize	Beverages, Juice
Tropical Delight	Canada	Beverages, Drink
Tropical Delight	Canada	Beverages, Juice
Choco Listo	Columbia	Beverages, Chocolate, Chocolate Milk
Fan	Cyprus	Beverages, Concentrate
OKF	Korea	Beverages, Drink
Jumex	Mexico	Beverages, Concentrate
Kern's Nectar	Mexico	Beverages, Juice
Dewlands	New Zealand	Beverages, Juice
Ceres	South Africa	Beverages, Juice
Libby's	Switzerland	Beverages, Juice
Juicy Juice	Switzerland	Beverages, Juice
T.A.S	Thailand	Beverages, Drink
Mak- C	Turkey	Beverages, Juice
Dimes	Turkey	Beverages, Juice
Waitrose	United Kingdom	Beverages, Juice
Essential Waitrose	United Kingdom	Beverages, Juice
Ribena	United Kingdom	Beverages, Juice
Pure Heaven	United Kingdom	Beverages, Juice Concentrate

Staff	**USA**	**Beverages, Concentrate**
Bahama Mama	**USA**	**Beverages, Drink**
Alo	**USA**	**Beverages, Drink**
Gatorade	**USA**	**Beverages, Drinks, Sports**
Mistic	**USA**	**Beverages, Juice**
Bolthouse	**USA**	**Beverages, Juice**
V8	**USA**	**Beverages, Juice**
Sunny D	**USA**	**Beverages, Juice**
Mott's	**USA**	**Beverages, Juice**
Welch’s	**USA**	**Beverages, Juice**
Arizona Iced Tea	**USA**	**Beverages, Juice**
Indian Summer	**USA**	**Beverages, Juice**
Ssips	**USA**	**Beverages, Juice**
OceanSpray	**USA**	**Beverages, Juice**
Naked	**USA**	**Beverages, Juice**
Bluebird	**USA**	**Beverages, Juice**
Tampico	**USA**	**Beverages, Juice**
Ocean Spray	**USA**	**Beverages, Juice**
Sunsweet	**USA**	**Beverages, Juice**
Minute Maid	**USA**	**Beverages, Juice**
Real Lemon	**USA**	**Beverages, Juice**
Del Monte	**USA**	**Beverages, Juice**
Shurfine	**USA**	**Beverages, Juice**
Blue Bird	**USA**	**Beverages, Juice**
Motts	**USA**	**Beverages, Juice**
Apple & Eve	**USA**	**Beverages, Juice**
Honest Kids	**USA**	**Beverages, Juice**
Kirkland Signature	**USA**	**Beverages, Juice**
Snapple	**USA**	**Beverages, Juice**

Lakewood	**USA**	**Beverages, Juice**
Tropicana	**USA**	**Beverages, Juice**
Calypso	**USA**	**Beverages, Juice**
Roland Grenadine	**USA**	**Beverages, Juice Concentrate**

4.6. Coconut Water

Two companies account for over half of the coconut water products identified in the region. Trinidad and the United States each had four products that were identified accounting for 53 percent of the products, each had four products. In Trinidad, there were two coconut water products manufactured by World Coconut Water and in the United States, there were two products from Vita Coco.

There were three other Caribbean companies that produced coconut water and supplied the region as well as one Brazilian company and one Thailand Company.

For the most part, the coconut water market is a fresh market. Locals and visitors alike enjoy stopping by roadside trucks where cut and bottled fresh coconut water is available for sale. Typically, islanders will purchase a fresh bottle of coconut water each day. As a result, sales of packaged coconut water is limited at best and are primarily made available for convenience. There does not appear to be a significant market opportunity in this category regionally.

4.6.1. CARIFORUM Producers

Brand	Country of Origin	Product Type
Island Queen	Bahamas	Coconut, Coconut Water
Coconut Cooler	Barbados	Coconut, Coconut Water
Grace Kennedy	Jamaica	Coconut, Coconut Water
Jus Nuts	Trinidad	Coconut, Coconut Water
World Coconut	Trinidad	Coconut, Coconut Water

4.6.2. Leading International Brands

Brand	Country of Origin	Product Type
Ducoco	Brazil	Coconut, Coconut Water
JBL	Thailand	Coconut, Coconut Water
Try It Coconut	Thailand	Coconut, Coconut Water
Conchita	USA	Coconut, Coconut Water
Goya	USA	Coconut, Coconut Water
Vita Coco	USA	Coconut, Coconut Water

4.7. Hot Beverages

4.7.1. Cocoa

4.7.1.1. Summary

There have been several regional programs aimed at developing the cocoa market. Very few CARIFORUM producers are producing cocoa for hot chocolates and other cold chocolate beverages. This product category is virtually untapped by CARIFORUM producers considering the tremendous efforts regionally to develop cocoa crops.

All major international brands were seen throughout the study countries.

Three regional producers were seen on the shelves:

4.7.1.1.1. CARIFORUM Producers

Manufacturer	Country of Origin	Product
Jouvay Chocolate	Grenada	Hot Beverages, Cocoa
Anjays's	St. Lucia	Hot Beverages, Cocoa
Trinite	Trinidad	Hot Beverages, Cocoa

4.7.2. Coffee

The coffee market is dominated by Nestle with the instant coffee brand Nescafe. For the most part, it would appear that there is a tradition and culture of instant coffee throughout the region. Converting coffee drinkers to fresh brewed coffee would require a well thought out marketing and conversion strategy. The introduction of coffee percolators and other coffee brewing apparatuses would be an important part of the campaign.

There is a market opportunity for CARIFORUM producers for whole bean, and freshly ground coffee. This is a higher end product within the coffee market compared to instant coffee that is saturate with multinationals. The opportunities seem the most promising in Barbados and Trinidad & Tobago where there was a dominance of whole bean or ground coffee.

A high quality, high volume locally or regionally produced coffee (instant and ground) would be able to build a strong following. Regional high volume roasters of coffee appear to be limited at best.

Imports of Coffee whether or not roasted or decaffeinated; coffee husks and skins; coffee substitutes containing coffee in any proportion HS0901				
	2009	2010	2011	2013
Antigua and Barbuda	209		294	356
Bahamas		2624	3052	356
Barbados	514		644	873
Saint Lucia		250	132	
Trinidad and Tobago		840	850	
TOTAL	**723**			

***Denoted in thousands USD**

Global Imports of Instant Coffee - Preparations with a basis of extracts, essences or concentrates of coffee or with a basis of coffee HS 210112				
	2009	**2010**	**2011**	**2013**
Antigua and Barbuda	218		45	49
Barbados	1152		989	1142
Bahamas		655	618	253
St. Lucia	19	19	34	
Trinidad & Tobago		130	289	
Total	1389	804	1975	1444

***Denoted in thousands USD**

4.7.2.1. CARIFORUM PRODUCERS

Manufacturer	Country of Origin	Product
Carib Bean Roaster	Antigua & Barbuda	Hot Beverages, Coffee
Caribbean Bean	Antigua & Barbuda	Hot Beverages, Coffee
Caribbean Dream	Jamaica	Hot Beverages, Coffee
Caribbean Select Coffee	Trinidad	Hot Beverages, Coffee
Chief	Trinidad	Hot Beverages, Coffee
Chief	Trinidad	Hot Beverages, Coffee

ColCafe	Columbia	Hot Beverages, Coffee
Ecaf	Barbados	Hot Beverages, Coffee
Green gold	St. Lucia	Hot Beverages, Coffee
Hong Wing	Trinidad	Hot Beverages, Coffee
Java Roast	Antigua & Barbuda	Hot Beverages, Coffee
Jose Perez	Trinidad	Hot Beverages, Coffee
Juan Valdez	Columbia	Hot Beverages, Coffee
Trinite	Trinidad	Hot Beverages, Coffee
West Indian Coffee	Barbados	Hot Beverages, Coffee
Wyndham's	Barbados	Hot Beverages, Coffee

4.7.2.2. Leading International Brands

Manufacturer	Country of Origin	Product
GeeBees	India	Hot Beverages, Coffee
MacCoffee	Singapore	Hot Beverages, Coffee
Nescafe	Switzerland	Hot Beverages, Coffee
Red Mountain	United Kingdom	Hot Beverages, Coffee
Waitrose	United Kingdom	Hot Beverages, Coffee
Melitta	USA	Hot Beverages, Coffee
Folgers	USA	Hot Beverages, Coffee
Maxwell House	USA	Hot Beverages, Coffee
Café Brasil	USA	Hot Beverages, Coffee
Starbucks	USA	Hot Beverages, Coffee
Red & White	USA	Hot Beverages, Coffee
Signature Blend	USA	Hot Beverages, Coffee

4.7.3. Tea

There were 138 different hot beverages identified from a number of countries. The United States had the most identified hot drink beverages with 43 products which represented 31 percent of the total products identified in the region. Trinidad had the second most products with 21 representing 15 percent of the identified products. Ten products originated from Jamaica representing 7 percent of the products while other non-Caribbean countries such as Sri Lanka Switzerland, and Columbia were represented with approximately 10 products.

There is a dominance of teas from around the world dominating significant self-space in the supermarkets. Only two regional manufacturers are present in this product category. They are Caribbean Dreams from Jamaica and Trinte from Trinidad. None produce a green tea and varieties of local herb teas that are indigenous to the region are limited at best.

Overall the tea market continues to grow and provide opportunity. Herbal Tea – provides a growth opportunity for well packaged and labelled "bush tea" and other regionally grown items to produce a variety of teas for the region. The target market is women 20 to 35 years old.

This is not an area where large concentrations of companies have focused recently. As one distributor told us herbal tea is growing at 10 % per year but the market is small as the users are women 20 to 35 years old. Additionally, trends are showing vast amounts of international ice-tea products. Beverage producers have an opportunity to target this market segment. Although a growing market, rebranding, re-packaging is recommended for local suppliers to be competitive with other international brands.

4.7.3.1. CARIFORUM Producers

Manufacturer	Country of Origin	Product
Caribbean Dream	Jamaica	Hot Beverages, Tea
Trinite	Trinidad	Hot Beverages, Tea

4.7.3.2. International Producers

Manufacturer	Country of Origin	Product
Red Rose	Canada	Hot Beverages, Tea
Basilur	Sri Lanka	Hot Beverages, Tea
Dilmah	Sri Lanka	Hot Beverages, Tea
Eve Red Label Tea	Sri Lanka	Hot Beverages, Tea
Good n' Natural	Thailand	Hot Beverages, Tea
Essential Waitrose	United Kingdom	Hot Beverages, Tea
H&H Slim-Mate	United Kingdom	Hot Beverages, Tea
Bigelow	USA	Hot Beverages, Tea
Lipton	USA	Hot Beverages, Tea
Tetley	USA	Hot Beverages, Tea

4.7.4. Herbal Teas

Global Total Imports of Tea, whether or not flavored HS 0902			
	2009	**2010**	**2011**
Antigua	423		301
Barbados	1250		1243
Bahamas	1423	1423	1432
St Lucia		100	116
Trinidad & Tobago		1335	1317
Total	3096	2858	4409

***Denoted in thousands USD**

4.7.4.1. CARIFORUM Producers

Manufacturer	Country of Origin	Product
Lemonbay	Antigua & Barbuda	Hot Beverages, Herbal Tea
MHN Hillside Herbals	Antigua & Barbuda	Hot Beverages, Herbal Tea
Natural Peppermint Tea	Jamaica	Hot Beverages, Herbal Tea
Trinite	Trinidad	Hot Beverages, Herbal Tea
Wadadli Bush Tea	Antigua & Barbuda	Hot Beverages, Herbal Tea
Caribbean Dream	Jamaica	Hot Beverages, Herbal Tea

4.7.4.2. Leading International Brands

Manufacturer	Country of Origin	Product
Twining	London	Hot Beverages, Herbal Tea
Red Rose	Canada	Hot Beverages, Herbal Tea
Tetley	USA	Hot Beverages, Herbal Tea
Lipton	USA	Hot Beverages, Herbal Tea
Bigelow	USA	Hot Beverages, Herbal Tea
Bobril	United Kingdom	Hot Beverages, Herbal Tea
Eve	Sri Lanka	Hot Beverages, Herbal Tea

Eve Red Label Tea	Sri Lanka	Hot Beverages, Herbal Tea
Four O'clock	Canada	Hot Beverages, Herbal Tea
Health King	USA	Hot Beverages, Herbal Tea
Celestial Seasonings	USA	Hot Beverages, Herbal Tea

4.7.5. Ice Tea

Few manufacturers are producing ice tea. The ice tea category is dominated by many international brands. Tea producers should consider partnering with juice manufacturers to produce delightful herbal ice tea drinks. SM Jaleel is producing a lovely Island Fusion Ice Tea. This is a huge growth market opportunity. This is certainly a niche opportunity for Caribbean producers.

4.8. Coconut Oil

4.8.1. Summary

Coconut Oil is a popular trending category and offers a huge opportunity for growth for CARIFORUM producers. Consumers are interested in this product and would prefer local and regional brands. There was very limited local and regional competition in this area. Producers currently operating in this product category should offer broader mixed ingredient ranges such as garlic coconut oil, ginger coconut oil, etc. Some international brands are also offering coconut gels.

Many new products were noted in this category. Creative products such as coconut cooking spray, coconut flour, coconut butter, coconut powder, coconut cream, coconut syrup, and coconut base products such as hair and body oil products present a major market opportunity for CARIFORUM producers.

Trinidad and Malaysia account for approximately 60 percent of the coconut oil products identified during the study. Trinidad had 19 different coconut oil products while Malaysia had 6. There were a total of 42 products identified in the region with other companies making up the remaining 17 coconut oil products. Sixteen percent of the coconut oil products came from Simply Nature out of Trinidad and 12 percent came from Malaysia's Daisy. Seven other countries had products in the region including Caribbean, Southeast Asia, and the United States.

Coconut Oil & Virgin Coconut Oil is trending and appears to present the largest growth opportunity. There are few CARIFORUM manufactures producing coconut oil. Buyers are seeking new sources of Coconut Oil. Virgin Coconut Oil attracts a higher price point. Demand is high, supplies are low.

4.8.2. CARIFORUM Producers

Manufacturer	Country of Origin	Product
O's	Barbados	Coconut, Coconut Oil
Raw Island	Antigua & Barbuda	Coconut, Coconut Oil, Raw Organic
Eden's Pride	Barbados	Coconut, Coconut Oil, Extra Virgin
VKM Brand	Guyana	Coconut, Coconut Oil
Fruit Of Life	Guyana	Coconut, Coconut Oil
Grace Kennedy	Jamaica	Coconut, Coconut Oil, Virgin
Back to roots	St. Lucia	Coconut, Coconut Oil
Frootsy	St. Lucia	Coconut, Coconut Oil, Extra Virgin
M&T	St. Lucia	Coconut, Coconut Oil, Extra Virgin
Naisa	Trinidad	Coconut, Coconut Oil
Simply Natural	Trinidad	Coconut, Coconut Oil
Mags	Trinidad	Coconut, Coconut Oil
Nariel	Trinidad	Coconut, Coconut Oil
Pure Coconut	Trinidad	Coconut, Coconut Oil, Pure
CGA	Trinidad	Coconut, Coconut Oil, Pure

4.8.3. Leading International Brands

Manufacturer	Country of Origin	Product
Daisy	Malaysia	Coconut, Coconut Oil
Fruit Of Life	Malaysia	Coconut, Coconut Oil
Eve	Sri Lanka	Coconut, Coconut Oil
PAM	USA	Coconut, Coconut Oil
Nature's Way	USA	Coconut, Coconut Oil, Extra Virgin
Better Body	USA	Coconut, Coconut Oil, Extra Virgin

4.8.4. Opportunity Ranking
CARIFORUM Products in study group

Global Imports Coconut oil and its fractions, whether or not refined, but not chemically modified (excl. crude) HC 15139

	2009	2010	2011	2013
Antigua & Barbuda	27			
Bahamas		125		
Barbados	20		9	64
St. Lucia			7	
Trinidad & Tobago			2	
TOTAL	47	125	18	64

Denoted in thousands USD

4.8.5. Other Coconut Products

Locally, regionally and internationally are positive growth trends for anything coconut. Coconut Milk (Powder and Liquid) was seen in all markets and is clearly a product well sought after mainly because of its ease of use characteristics in cooking.

There are 27 different coconut milk manufactures selling products in the region. Jamaica and the United States have the most products in the region accounting for half of the products identified. Two other products derived from coconuts were identified in retail markets that have growth possibilities. There is coconut flour and coconut sugar both were international brands.

The competition for Coconut product is from Malaysia and the United States.

Manufacturer	Country of Origin	Product
Regional Brands		
Caribbean Dream	Jamaica	Coconut, Coconut Milk, Powder
Grace Kennedy	Jamaica	Coconut, Coconut Milk
Sangsters	Jamaica	Coconut, Coconut Cream
Wray & Nephew	Jamaica	Coconut, Coconut Cream
El Coco Rico	St. Lucia	Coconut, Coconut Milk
Coconut Milk	St. Lucia	Coconut, Coconut Milk
Tobaco Town	Trinidad	Coconut, Coconut Cream
Exquisite	Trinidad	Coconut, Coconut Cream
Mabel	Trinidad	Coconut, Coconut Milk
Happi	Trinidad	Coconut, Coconut Milk
Karibbean Flavours	Trinidad	Coconut, Coconut Milk
Island Pride	Trinidad	Coconut, Coconut Milk

International Brands		
Oriental Chef	Thailand	Coconut, Coconut Milk
JBL	Thailand	Coconut, Coconut Milk
Regal Thai	Thailand	Coconut, Coconut Milk
Caribbean Choice	United Kingdom	Coconut, Coconut Milk
Phil-Am	USA	Coconut, Coconut Gel
Costamar	USA	Coconut, Coconut Milk
Roland	USA	Coconut, Coconut Milk
Goya	USA	Coconut, Coconut Milk
Valrico	USA	Coconut, Coconut Milk
Maggi	Switzerland	Coconut, Coconut Milk
Coco Lopez	Puerto Rico	Coconut, Coconut Milk
Guapa	Dominican Republic	Coconut, Coconut Milk
Kara	Singapore	Coconut, Coconut Milk

4.9. Crackers and Biscuits

4.9.1. Summary

Opportunity for vegetable baked snacks with garlic and added ingredients.

There were 124 different cookies and biscuit products identified in the region. The majority of these products originated from three countries, Trinidad (42), the United Kingdom (26) and Barbados (23).

Asian Gourmet out of China had three products that were identified in the region. Crawfords out of the United Kingdom had six cookie and cracker products that were identified while Crix was seen in all countries and all supermarket shelves. McVites, also out of the United Kingdom had 11 identified products in the region the most by far. Sobodax out of Barbados had three identified products in the area. Interestingly, there were few United States products identified and few products from other countries.

Crackers and Biscuits is a competitive market with large multinational, large regional firms and new larger firms from Central and South America. On the positive, there seems to be a growing demand for these products and a niche for new firms. With large multinationals and a large local producer it will be hard to gain a foothold in this market. The larger firms will have a price advantage and economies of scale strongly in their favor. A company will need to have a highly finished product that can compete in this price sensitive market in order to differentiate itself on shelf.

4.9.2. CARIFORUM Producers

Brand	Country of Origin	Product Type
Shirley Biscuit	Barbados	Crackers & Biscuits, Biscuit
Teatime	Barbados	Crackers & Biscuits, Biscuit
O'swell	Barbados	Crackers & Biscuits, Biscuit
Sodabix	Barbados	Crackers & Biscuits, Biscuit
Sodabix Rounds	Barbados	Crackers & Biscuits, Biscuit
Tea Time	Barbados	Crackers & Biscuits, Biscuit
Turmix	Barbados	Crackers & Biscuits, Biscuit
ButterKist	Jamaica	Crackers & Biscuits, Biscuit
KC Candy	Trinidad	Crackers & Biscuits, Biscuit
Butter Nut	Trinidad	Crackers & Biscuits, Biscuit
Indulgeums	Trinidad	Crackers & Biscuits, Biscuit
Dominio	Trinidad	Crackers & Biscuits, Biscuit
Festival	Trinidad	Crackers & Biscuits, Biscuit
Nibbles	Trinidad	Crackers & Biscuits, Biscuit
Recreo	Trinidad	Crackers & Biscuits, Biscuit
Rough tops	Trinidad	Crackers & Biscuits, Biscuit
Vanilla	Trinidad	Crackers & Biscuits, Biscuit
Domino	Trinidad	Crackers & Biscuits, Biscuit
Rough top	Trinidad	Crackers & Biscuits, Biscuit
Holiday	Trinidad	Crackers & Biscuits, Cookies
Eclipse	Barbados	Crackers & Biscuits, Crackers
Crix	Trinidad	Crackers & Biscuits, Crackers
Dixie	Trinidad	Crackers & Biscuits, Crackers
Ducales	Trinidad	Crackers & Biscuits, Crackers

Dux	Trinidad	Crackers & Biscuits, Crackers
Crisps	Trinidad	Crackers & Biscuits, Crackers
Digestive	Trinidad	Crackers & Biscuits, Crackers

4.9.3. Leading International Brands

Brand	Country of Origin	Product Type
Go Ahead	United Kingdom	Crackers & Biscuits, Biscuit
Crawfords	United Kingdom	Crackers & Biscuits, Biscuit
All Butter Short Bread	United Kingdom	Crackers & Biscuits, Biscuit
Bourbon Creams	United Kingdom	Crackers & Biscuits, Biscuit
Full Short Cake	United Kingdom	Crackers & Biscuits, Biscuit
Ginger Nuts	United Kingdom	Crackers & Biscuits, Biscuit
Marie	United Kingdom	Crackers & Biscuits, Biscuit
Mcvites	United Kingdom	Crackers & Biscuits, Biscuit
Maryland	United Kingdom	Crackers & Biscuits, Biscuit
Lyons	United Kingdom	Crackers & Biscuits, Biscuit
Digestives	United Kingdom	Crackers & Biscuits, Biscuit
Hobnob	United Kingdom	Crackers & Biscuits, Biscuit
Chip Ahoy	USA	Crackers & Biscuits, Biscuit
Oreo	USA	Crackers & Biscuits, Biscuit
Vinta	Canada	Crackers & Biscuits, Biscuit
Voortman	Canada	Crackers & Biscuits, Biscuit
Tosh	Columbia	Crackers & Biscuits, Biscuit
Festival	Columbia	Crackers & Biscuits, Biscuit
Lexus	Malaysia	Crackers & Biscuits, Biscuit
Lee	Malaysia	Crackers & Biscuits, Biscuit
McVities	Scotland	Crackers & Biscuits, Biscuit
Ovaltine	Switzerland	Crackers & Biscuits, Biscuit
Fox's	United Kingdom	Crackers & Biscuits, Cookies

Crawford's	United Kingdom	Crackers & Biscuits, Cookies
Devon	Malta	Crackers & Biscuits, Cookies
Ryvita Deli	United Kingdom	Crackers & Biscuits, Crackers
Club Social Original	USA	Crackers & Biscuits, Crackers
Triscuit	USA	Crackers & Biscuits, Crackers
Club Crackers	USA	Crackers & Biscuits, Crackers
Wheat Thins	USA	Crackers & Biscuits, Crackers
Ritz	USA	Crackers & Biscuits, Crackers
Breton	Canada	Crackers & Biscuits, Crackers
Grains First	Canada	Crackers & Biscuits, Crackers
Asian Gourmet	China	Crackers & Biscuits, Crackers
Ducales	Columbia	Crackers & Biscuits, Crackers
Dux	Columbia	Crackers & Biscuits, Crackers
Saltin	Columbia	Crackers & Biscuits, Crackers
Jacob's	Malaysia	Crackers & Biscuits, Crackers

4.10. Gluten Free - Breads, Pancake/Waffle Mixes

4.10.1. Summary

There were 12 products in this category identified in the region. Nine of the 12 (75%) originated in the United States. Aunt Jemima, Bisquick, and Hungry Jack were the most prevalent brands. There were two companies in Trinidad that produce pancake mixes, one named Regal Roti and one United Kingdom mix called Yorkshire Puddings and Pancake mix.

Gluten Free Breads – Niche product category with very limited growth opportunities.

There were 23 gluten free products identified in the region. Thirteen of these products hailed from the United States. There were three from Barbados and two from St. Lucia. The remaining five were from the United, Costa Rica, and Canada. Seven of the products from the United States were manufactured by Arrowhead Mills and three more were from Betty Crocker. O's Sweet manufactured two of the products identified from Barbados.

Although this market is very small and growing, companies already processing unique raw material may develop cereals using indigenous raw materials such as: Dasheen and Cassava cereals, breads and pancake mixes. Packaging products to meet international standards will be critical to capture any share of this market as this product category is mostly purchased by expatriates living or visiting on the island.

Gluten Free products will take a fair amount of education of the population to even acknowledge that they are allergic to gluten. This includes the general population and for the medical community to even diagnosis the issue. There is a natural opportunity for a product that is gluten free to add this identifier to the label. It does not seem at this time for a new market entry to solely focus on this market to grow a business.

Global Imports of Mixes and doughs of flour, meal, starch or malt extract, not containing cocoa or containing < 40% by weight of cocoa calculated on a totally defatted basis, n.e.s. (not elsewhere specified) and of mixes and doughs of milk, cream, butter milk, sour milk, sour cream, whey, yoghourt, kefir or similar goods of headings 0401 to 0404, not containing cocoa or containing < 5% by weight of cocoa calculated on a totally defatted basis, n.e.s., for the preparation of bakers' wares HC 190120

	2009	2010	2011	2013
Antigua and Barbuda	376		423	444
Bahamas		1147	1356	1758
Barbados	1717		2104	346
Saint Lucia		175	223	
Trinidad & Tobago		3617	4781	
Total	2093	4939	8887	2548

*Denoted in thousands USD

4.10.2. CARIFORUM Producers

There were no CARIFORUM producers seen in this product category

4.10.3. International Leading Brands

Brand	Country of Origin	Product Type
Barkat	United Kingdom	Gluten Free , Cereal
Ancient Harvest	USA	Gluten Free, Cereal
Arrowhead Mills	USA	Gluten Free, Cereal
Nnova Rice	Costa Rica	Gluten Free, Pancake
Bob's Red Mill	USA	Gluten Free, Pancake

Arrowhead Mills	USA	Gluten Free, Pancake

4.10.4. Gluten Free, Other

There are several raw material indigenous to the Caribbean which can be processed other exotic Gluten Free flour. Consider, Coconut, Breadfruit, Cassava, Potato Flours. Already there are a few traces of unique Caribbean products seen on the shelf.

Brand	Country of Origin	Product Type
O's	Barbados	Gluten Free - Coconut Flour
O's	Barbados	Gluten Free - Potato Flour
Carmeta's	Barbados	Gluten Free, Flour, Breadfruit
Dark Seamoss	St. Lucia	Gluten Free, Concentrate

Other international products seen in various categories were:

Brand	Country of Origin	Product Type
Nnova Rice	Costa Rica	Gluten Free, Baked Goods
Arrowhead Mills	USA	Gluten Free, Baking Mix
Arrowhead Mills	USA	Gluten Free, Brown Rice
All But Gluten	Canada	Gluten Free, Cakes
Betty Crocker	USA	Gluten Free, Cakes
Betty Crocker	USA	Gluten Free, Cookies
Betty Crocker	USA	Gluten Free, Cookies
Arrowhead Mills	USA	Gluten Free, Smelt Flour
Arrowhead Mills	USA	Gluten Free, White Rice
1-2-3 Gluten free	USA	Gluten Free, Flour

4.10.5. Pancake/Waffle Mixes – Non Gluten Free

Brand	Country of Origin	Product Type
Regal	Trinidad	Pancakes & Waffles
Country Harvest	Trinidad	Pancakes & Waffles

International Brands		
Yorkshire Puddings & Pancakes mix	United Kingdom	Pancakes & Waffles
Aunt Jemima	USA	Pancakes & Waffles
Log Cabin	USA	Pancakes & Waffles
Hungry Jack	USA	Pancakes & Waffles
Bisquick	USA	Pancakes & Waffles
Aunt Jemima	USA	Pancakes & Waffles
Bisquick	USA	Pancakes & Waffles
Aunt Jemima	USA	Pancakes & Waffles
Bisquick	USA	Pancakes & Waffles
IGA	USA	Pancakes & Waffles

4.11. Sweeteners

4.11.1. Summary

The majority of these products originated from the United States, Barbados, and Trinidad. Products manufactured in the United States account for 35 percent of the identified products with Barbados accounting for 27 percent of the products and Trinidad accounting for 13 percent.

Guyana has begun to capture market share for both refined and brown sugar in the Eastern Caribbean. Their products were dominant in Trinidad & Tobago and Barbados. The issues for this product is focus on maintaining existing market share as Brazil and Mexico view the Caribbean as a prime market, thus it is price sensitive. For Guyana to maintain its position in the market, developing a reputable brand around the product and encapsulating the premium value that Guyana sugar brings to the market is paramount. This is similar to the small production, but highly priced quality of sugar products that Barbados currently produces.

4.11.2. Sugar

Guyana has gained market share in the Eastern Caribbean being represented in Antigua & Barbuda, St. Lucia, Barbados, and Trinidad & Tobago.

Sugar is a commodity and the gains Guyana has in the market could easily be taken from Mexico or another country in one year. A program to develop the country of origin for sugar to create some staying power beyond price is important to hinder other competitors in taking market share.

There were 23 sugar products identified in the region with 39 percent of them originating from Trinidad. Another 34 percent of the products come equally from the United Kingdom (17%) and the United States (17%).

Global Imports of Raw cane sugar, in solid form, not containing added flavoring or coloring matter HS 170114 (excl. cane sugar of 1701 13)				
	2009	2010	2011	2013
Antigua and Barbuda	669		1436	
Bahamas		1868	2071	376
Barbados	1079		1,485	1013
Saint Lucia		1092	1768	
Trinidad & Tobago		11,626	10743	
Total	1748	14586	17503	1389

Denoted in thousands USD

4.11.3. CARIFORUM Producers

Brand	*Country of Origin*	*Product Type*
Mum's	***Barbados***	***Sweeteners, Sugar***
Plantation Reserve	***Barbados***	***Sweeteners, Sugar***
Barbados Traditional	***Barbados***	***Sweeteners, Sugar***
Barbados Cane Sugar	***Barbados***	***Sweeteners, Sugar***
Demerara Gold	***Guyana***	***Sweeteners, Sugar***
Rainbow	***Trinidad***	***Sweeteners, Sugar***
Happi	***Trinidad***	***Sweeteners, Sugar***
Sweet Cane	***Trinidad***	***Sweeteners, Sugar***
Par Excellence	***Trinidad***	***Sweeteners, Sugar***

4.11.4. Leading International Brands

Brand	Country of Origin	Product Type
Tate & Lyle	United Kingdom	Sweeteners, Sugar
Tate & Lyle	United Kingdom	Sweeteners, Sugar
Waitrose	United Kingdom	Sweeteners, Sugar, Brown
Waitrose	United Kingdom	Sweeteners, Sugar, Brown
Domino	USA	Sweeteners, Sugar
First Choice	USA	Sweeteners, Sugar
Sugar in the Raw	USA	Sweeteners, Sugar
Shurfine	USA	Sweeteners, Sugar
Lantic	Canada	Sweeteners, Sugar

4.11.5. Other Sweeteners

Brand	Country of Origin	Product Type
Wholesome Sweeteners	Texas	Sweeteners
Abram Lyle & Sons	United Kingdom	Sweeteners
Chantico	USA	Sweeteners, Agave
Chantico	USA	Sweeteners, Agave
Madhava	USA	Sweeteners, Agave

4.11.6. Honey

Global Imports of Natural Honey HS 0409				
	2009	2010	2011	2013
Antigua & Barbuda	71		68	77
Bahamas	391		426	463
Barbados	311		324	347
St. Lucia		2	3	
Trinidad & Tobago		5		
Total	773	7	821	887

Denoted in thousands USD

The United States (33%), Canada and St. Lucia's honey products were the most prevalent in the region. United States honey products accounted for 46 percent of honey products followed by Canada with 12 percent and St. Lucia 12 percent.

Honey is imported from around the world. Consumers prefer local honey. The collapses of bee hives from disease in North American have halted the exports of honey to St. Lucia and Trinidad in order to protect their own bee populations. In addition while there is demand for local honey at the grocery store level most people continue to buy it from friends, neighbors and at local farmer markets. Locally produced honey is limited at best. There appears to be more demand than supply and surely an area for growth and development.

In Barbados, St. Lucia and Trinidad they do not allow the importation of honey. While in all five countries there was a lack of local honey on the grocery store shelves. Working with the honey cooperatives and producers in understanding the advantages to selling it in the grocery store versus at road side stands or farmers market is lowering their profitability and the creation of sustainable business. Every country requested more local production of honey to be sold in the stores.

4.11.6.1. CARIFORUM PRODUCERS

Brand	Country of Origin	Product Type
100% Pure Honey	Antigua & Barbuda	Sweeteners, Honey
Paige	Antigua & Barbuda	Sweeteners, Honey
Morvin's Honey	St. Lucia	Sweeteners, Honey
Honey	St. Lucia	Sweeteners, Honey
Frootsy	St. Lucia	Sweeteners, Honey
Tropical Forest	Trinidad	Sweeteners, Honey
Anthony's Honey	Trinidad	Sweeteners, Honey
Bee's	Trinidad	Sweeteners, Honey

4.11.6.2. International Leading Brands

Brand	Country of Origin	Product Type
Shurfine	USA	Sweeteners, Honey
Goya	USA	Sweeteners, Honey
IGA	USA	Sweeteners, Honey
Sue Bee	USA	Sweeteners, Honey
Aunt Sue	USA	Sweeteners, Honey
Shurfine	USA	Sweeteners, Honey
Sue Bee	USA	Sweeteners, Honey
Golden Blossom Honey	USA	Sweeteners, Honey
Sue Bee	USA	Sweeteners, Honey
Red & White	USA	Sweeteners, Honey
BeeMaid	Canada	Sweeteners, Honey
BeeMaid	Canada	Sweeteners, Honey

Billy Bee	**Canada**	**Sweeteners, Honey**
BeeMaid	**Canada**	**Sweeteners, Honey**
Billy Bee	**Canada**	**Sweeteners, Honey**
Polar	**Finland**	**Sweeteners, Honey**
Waitrose	**United Kingdom**	**Sweeteners, Honey**

4.11.7. Syrup

There are a number of well branded local and regional producers of syrups. None have crossed over to the Pancake/Syrup category nor the Bar/Mixers category. Local and regional brands are positioned for traditional uses and poorly packaged. Product crossover opportunities in exotic fruit flavors such as coconut and others present themselves to expand existing brands and cross over to supply a fruit flavored pancake syrup and or mixers for alcoholic cocktails. No CARIFORUM products have crossed over to the pancake syrup market. Squeeze packaging to international standards would be critical for product acceptance.

4.11.7.1. CARIFORUM Producers

Brand	Country of Origin	Product Type
Pozas	Barbados	Sweeteners, Molasses
Great Quality Molasses	St. Lucia	Sweeteners, Molasses concentrate
Shirltone	Barbados	Sweeteners, Syrup
Blanches	Trinidad	Sweeteners, Syrup
Blanches	Trinidad	Sweeteners, Syrup
R&L	Barbados	Sweeteners, Syrup
Bello	Dominica	Sweeteners, Syrup, Fruit
Baron	St. Lucia	Sweeteners, Syrup, Fruit
Aunt May's	Barbados	Sweeteners, Syrup, Ginger
Viking	St. Lucia	Sweeteners, Syrup, Grenadine
Caribbean Treats	Barbados	Sweeteners, Syrup, Lemonade
Delish	Barbados	Sweeteners, Syrup, Mauby
Country Boy	Barbados	Sweeteners, Syrup, Mauby
R&L	Barbados	Sweeteners, Syrup, Mauby
Shirltone	Barbados	Sweeteners, Syrup, Molasses
Golden Delight	Trinidad	Sweeteners, Syrup, Molasses

Morne Delice	Grenada	Sweeteners, Syrup, Nutmeg
Blanche's	Trinidad	Sweeteners, Syrups, Maple
Grandma's Traditional	Barbados	Sweeteners, Syrups, Mauby
Grandma's Traditional	Barbados	Sweeteners, Syrups, Mauby
Nizam's	Trinidad	Sweeteners, Syrups, Molasses
Windmill	Barbados	Sweeteners, Syrups, Sorrel
Superb Blend	Barbados	Sweeteners, Syrups, Sorrel

4.11.7.2. Leading International Brands

Brand	Country of Origin	Product Type
Grandma's Molasses	USA	Sweeteners, Molasses Concentrate
Abram Lyle & Sons	United Kingdom	Sweeteners, Syrup
Shurfine	USA	Sweeteners, Syrup
Camp	Canada	Sweeteners, Syrup, Maple
Uncle Luke's	Canada	Sweeteners, Syrup, Maple
Waitrose	United Kingdom	Sweeteners, Syrup, Maple
Presidents Choice	Canada	Sweeteners, Syrup, Pancake
Aunt Jemima	USA	Sweeteners, Syrup, Pancake
Hungry Jack	USA	Sweeteners, Syrup, Pancake
Shurfine	USA	Sweeteners, Syrup, Pancake
Roddenberry's Northwood's	USA	Sweeteners, Syrup, Pancake
Hy-Top	USA	Sweeteners, Syrup, Pancake
Karo	USA	Sweeteners, Syrup, Pancake
Shurfine	USA	Sweeteners, Syrup, Sugar Free

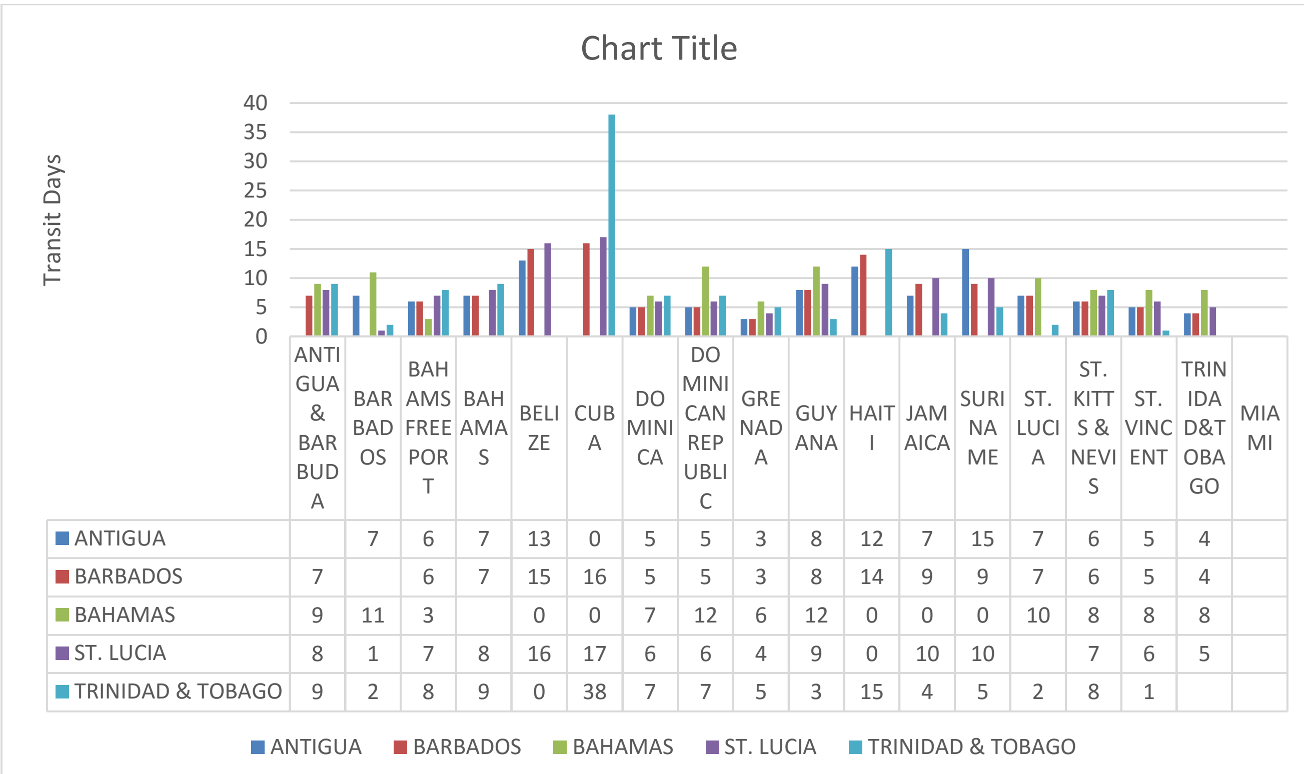
5. Transportation

5.1. Overview

Transportation to the selected countries (Antigua, St. Lucia, Barbados, Trinidad & Tobago, and Bahamas) is available for the most part. Based on the study conducted, there are transit limitation for cargo moving to and from Belize to the Bahamas, Cuba to the Bahamas, Jamaica to the Bahamas, and Suriname to the Bahamas. Because of the Bahamas proximity to Florida, moving cargo from member states via Miami, Florida may be an option. There are several large ocean freight companies operating between Miami and The Bahamas.

With freight rates averaging US$ 1,200 per TEU (say, US$ 60 or EC$ 160 per ton of landed cargo), the cost of freight is rarely more than 5% of the landed cost of the goods. Containerized cargo is almost exclusively carried by the formal, large liner companies. Break-bulk cargo is mostly carried by the informal sector.

5.2. Transportation Transit



	ANTIGUA & BARBUDA	BARBADOS	BAHAMS FREEPORT	BAHAMAS	BELIZE	CUBA	DOMINICA	DOMINICAN REPUBLIC	GRENADA	GUYANA	HAITI	JAMAICA	SURINAME	ST. LUCIA	ST. KITTS & NEVIS	ST. VINCENT	TRINIDAD&TOBAGO	MIAMI
ANTIGUA		7	6	7	13	0	5	5	3	8	12	7	15	7	6	5	4	
BARBADOS	7		6	7	15	16	5	5	3	8	14	9	9	7	6	5	4	
BAHAMAS	9	11	3		0	0	7	12	6	12	0	0	0	10	8	8	8	
ST. LUCIA	8	1	7	8	16	17	6	6	4	9	0	10	10		7	6	5	
TRINIDAD & TOBAGO	9	2	8	9	0	38	7	7	5	3	15	4	5	2	8	1		

	Transit Study in Selected Study Member States				
	ANTIGUA	BARBADOS	BAHAMAS	ST. LUCIA	TRINIDAD & TOBAGO
ANTIGUA & BARBUDA		7	9	8	9
BARBADOS	7		11	1	2
BAHAMS FREE PORT	6	6	3	7	8
BAHAMAS	7	7		8	9
BELIZE	13	15	X	16	10-17
CUBA	X	16	X	17	38
DOMINICA	5	5	7	6	7
DOMINICAN REPUBLIC	5	5	12	6	7
GRENADA	3	3	6	4	5
GUYANA	8	8	12	9	3
HAITI	12	14	19-27	14-15	15
JAMAICA	7	9	X	10	4
SURINAME	15	9	X	10	5
ST. LUCIA	7	7	10		2
ST. KITTS & NEVIS	6	6	8	7	8
ST. VINCENT	5	5	8	6	1
TRINIDAD&TOBAGO	4	4	8	5	
MIAMI					
Tropical Shipping					
Cagema					
King Ocean Freight					
Millenium Freights					

6. Market Opportunities

6.1. Private Label

Private labels offer retailers control over product factors such as pricing, size, package design, production and distribution. Retailers can develop and implement innovative ideas to gain market share over national brands. This includes the ability to make quick adjustments to products based on customer's changing preferences.

6.2. Product Development & Repositioning Strategy

Many product development opportunities exist for producers. These product ranking opportunities are ranked as follows:

Coconut Oil	1
Hot Beverages: Coffee and Herbal teas	2
Sweeteners (sugar, honey)	3
Sauces: Pepper sauces, pepper jellies, chutneys, jerk sauces, marinades,	4
Condiments: Jams, jellies, fruit butters and cheeses, indigenous confectionery pepper wines,	5
Beverages: Fruit juices and concentrates, bottled coconut water, to include Ice Tea	6
Crackers and biscuits	7
Bakery Products: Rum cakes and similar baked goods	8
Gluten free breads/pancake/waffle mixes	9

Below are opportunities that exist for these product categories:

6.2.1. Coconut Oil & Virgin Coconut Oil

Coconut Oil is trending and appears to present the largest growth opportunity based on the study categories. Additionally consumers seem willing to pay higher prices. Demand is high, supplies are low.

- There are few CARIFORUM manufactures producing cooking coconut oil.
    - There is a market opportunity for diversification for producers with this capacity.
    - There is an opportunity for this product category to grow in the traditional oil category within the niche and mass market.
        - Special emphasis must be placed on the packaging for mass vs niche.
- Oil combinations can be developed to include garlic, ginger and other exotic flavored coconut oil to be used as cooking oils
- Coconut based products such as:
    - Salad dressings
    - Marinades
    - Cooking sauces and pastes
    - Curry combinations
- Coconut gels are trending and are desirable
- Coconut based hair and body products will feed well into the salon, spa and wellness markets
- Coconut powders, curds and flours fit well into the Gluten Free category and integrates well in the wider baking industry
- Coconut syrups for pancakes, waffles and alcoholic bar cocktails
- Coconut creams for alcoholic bar cocktails and drinks
- Coconut based alcoholic beverages are trending and desirable.
- Coconut cooking spray, coconut butter, are excellent product diversification options.
- Coconut sugar

6.2.2. Gluten Free

The Gluten Free category is a niche market with limited growth opportunities. Gluten Free products are specialty items positioned to satisfy the needs of upper income shoppers who suffer from allergy issues. A few regional manufactures are already, quite by default, producing gluten free products. It would appear that these producers have not seen a market opportunity in this category and as such the packaging and labelling do not state Gluten Free. While this is a low volume category, the inclusion of the wording Gluten Free on the packs could position the products in several areas within the supermarket. This would certainly result in increased sales.

Packaging products to meet international standards will be critical to capture any share of this very sophisticated market as this product category is mostly purchased by expatriates living or visiting on the island.

Already there are a few traces of unique Caribbean products seen on the shelf.

The opportunities are:

- Relabeling of existing products with the wording Gluten Free so that they can cross over to this category. Examples are:
  - Flours such as dasheen, breadfruit, coconut, cassava, potatoes
  - Cassava and other indigenous breads

  Diversify with new products such as:
  - Pancake and waffle mixes using indigenous raw material
  - Hot cereals such as corn meal and other indigenous ingredients
  - Breads such as cassava bread

6.2.3. Sweeteners

6.2.3.1. Syrups

- There are many regional producers with a wide range of exotic fruit based syrups currently on the shelves in juice category each of the countries included in the study. These local and regional brands are positioned for traditional uses "add water and serve" and often poorly packaged. More and more with the prevalence of diabetes in the region, consumers are becoming more conscious about their purchasing decisions in food.
- Product crossover opportunities in exotic fruit flavors such as coconut and others to expand product ranges and existing brands. Producers should consider developing the appropriate packaging (such as squeeze bottles) to international standards used in these product categories.

Diversification and product development to supply the

- Pancake syrups (fruit, or maple syrup combinations)
- Mixers (such as martini) for alcoholic cocktails and other categories (volume & individual packaging sizes)
- Sweet BBQ sauces, Sweet and Sour cooking sauces and other cooking marinades
- Salad dressings that are lower in sugar content
- Traditional fruit flavors similar to log cabin that uses only maple syrup flavoring which could be developed and sold to the traditional/tourist market to be used as a natural sweeteners

6.2.4. Honey

Consumer have a preference to consume local honey over international brands. The regional honey producing sector is weak at best. Recycled packaging was seen on the shelves drowned by sophisticated international brands.

- Honey packaging needs dire change to standard international packaging options

- Honey labelling needs upgrades

6.2.5. Sugar

Country specific branding for sugar. Sugar is a commodity and the gains Guyana has in the market could easily be taken from Mexico or another country in one year. A program to develop the country of origin for sugar to create some staying power beyond price is important to hinder other competitors in taking market share.

6.3. Teas

- Regional teas appear to be limited to the Herbal category. There are few Ice Tea producers in the region. The Ice Tea category was dominated by international products indicating that there is demand for these products within which there are niche opportunities for regional producers.
  - Herbal tea companies should consider partnerships with the cold beverage industry to produce and convert "bush teas" into delightful refreshing all natural ice tea beverages.

Other development ideas are:

  - Green Tea
  - Other exotic fruit flavored teas
  - Teas used for medicinal purposes that work well with the spa and wellness market segment.
  - Artisanal teas producers who have volume capacity should consider repackaging of existing product lines to cross over to the tradition tea shelves where there are higher volumes.
  - Incorporation of unique packaging such as tins, glass containers, etc. to increase the perceived value and increase profits.

6.4. Jams & Jellies

Jams and Jellies are a saturated market of local, regional and international products. Regional jams are packaged in a standard bottle that is seen across all brands. Labeling and other esthetic treatments of the packs are lacking in most cases. Product differentiation is often difficult because of the similarity of the products. Exotic flavors and textures are seen and are very desirable.

- Product packaging and labelling differentiation options are recommended as product "look alike" each other. Goya has differentiated its product by incorporating an interesting squeeze pack.
- High levels of fruit content may find a niche opportunity in this market. Fruit bits and pieces can be added to syrup combinations of these products to be used as fruit toppers and pie fillings in the baking market for cakes and desserts. CARIFORUM producers can convert some of these concepts using indigenous fruits such as guava and mango packed uniquely to cross over to this market segment.

6.5. Coffee

There is a market opportunity for whole bean coffee. Most of the ground coffee seen on the market was dominated by international brands and regional artisanal brands. Instant coffee dominates this category. No regional producers produced an ice coffee

- Beverage companies should consider the inclusion of a bottle ice-coffee drink
- Ground coffee in mass market packaging will yield high volumes.
  - Converting coffee drinkers to fresh brewed coffee would require a well thought out marketing and conversion strategy. The introduction of coffee percolators and other coffee brewing apparatuses would be an important part of the campaign.
- A well packaged, well-priced, good quality instant coffee would steal market share from Nescafe.

6.6. Crackers and Biscuits

Crackers and Biscuits made regionally are basic products. At best there are no interesting varieties. Existing packaging is positioned for the mass, low priced categories.

- The introduction of flavors such as garlic, and seeds such as sesame could present new market opportunities for these producers.
- Vegetable baked snacks could expand product range and cross over to new categories.

6.7. Fruit Butters and Cheeses

There are a few regional brands which are well packaged, well presented and well-priced in the category. Smaller brands are poorly wrapped and are scattered chaotically on the supermarket shelves. Small producers need urgent packaging support to develop the products so that they can take advantage of the tourist and visiting notational market.

- Plastic hang bags are inexpensive and display well
- Artisanal presented packs would increase sales and profits
- Dried fruit blends in syrups or dried that are well packaged could create new product ranges and expand market share into the healthy snack category. Imagine crystalized tamarind (Tamarind Balls)

6.8. Beverages – Juices

- Seamoss drinks are in high demand in the Region. Few companies are producing a well packaged stable product. Supplies are low and demand is high. There is a market opportunity for beverage producers to enter this market segment.

- Many regional producers are manufacturing concentrate drinks for the traditional "add water" market. Given the high sugar content of these drinks, it is highly suggested that these products are converted for use as cocktails at bars or even converted to BBQ sauces.

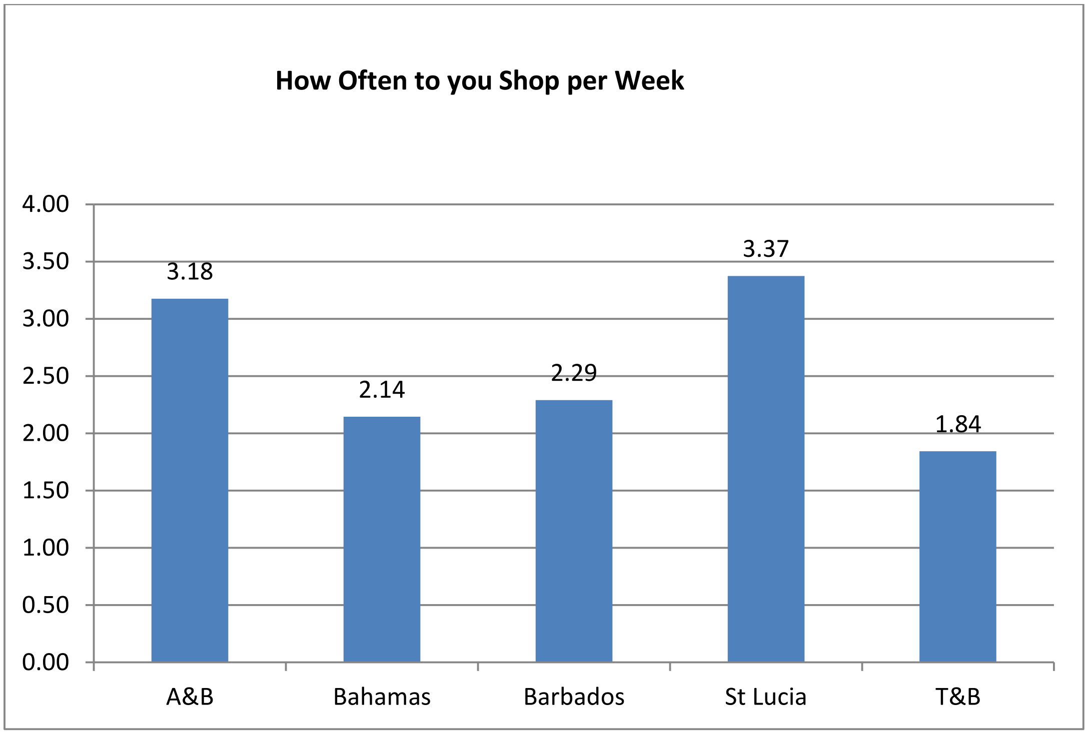
6.9. Consumer Analysis (Five Countries)

In-store surveys were administered to shoppers as they shopped for groceries. An interviewer would intercept a potential shopper and ask them if they would be willing to participate in a survey. The respondents were then asked a series of questions and after successfully completing the survey, given a store gift card or cash payment of $2 to $3 USD for their time. The amount each respondent received for payment varied by country.

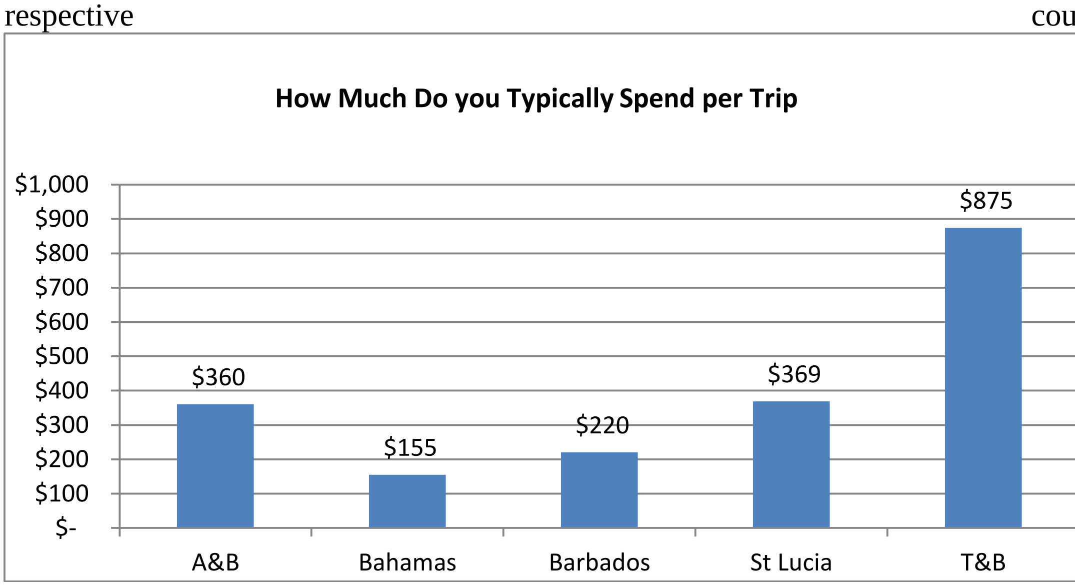
The goal was to obtain approximately 100 surveys per Country. The surveys were collected from multiple grocery stores and retailers in each country to get a representative sample.

Five hundred surveys were conducted, one hundred each in Antigua, St. Lucia, Barbados, Trinidad & Tobago and The Bahamas.

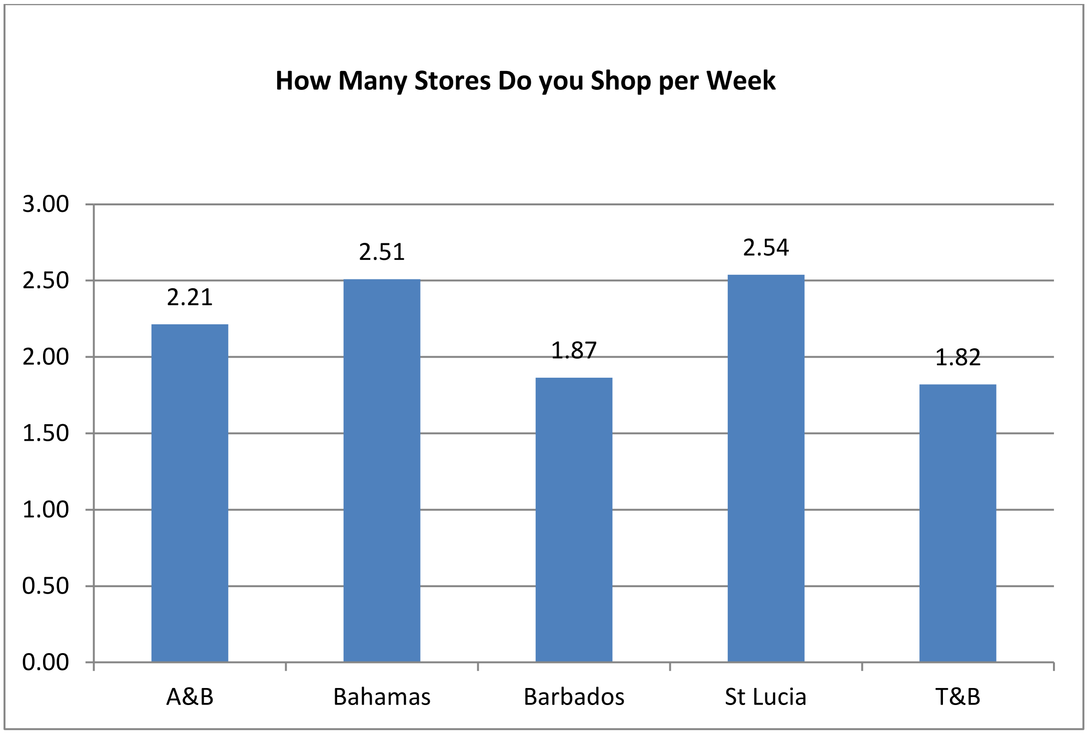
The respondents were asked on average, how often they shop per week. Respondents in Antiqua and Barbuda and those in St. Lucia shopped over three times per week on average, significantly higher than the respondents in the other countries. The other respondents shopped about two times per week.



The respondents were asked how much they typically spend on their shopping trip. The amounts vary by country. The dollar amounts are representative of the currency used in the respective countries.



On average, the respondents shop about two times per week. Bahama and St. Lucia respondents show significantly more per week on average than the other respondents.



The respondents were then asked whether they were a resident or if they were a visitor/tourist. Interestingly, there were significantly more visitor/tourists in the St. Lucia sample than in the other countries.

Respondent's Residential Status						
	Country					
	A&B (n=88)	Bahamas (n=96)	Barbados (n=91)	St Lucia (n=103)	T&T (n=104)	Total
Resident	90.9%	85.4%	96.7%	77.7%	95.2%	89.0%
Visitor	9.1%	14.6%	3.3%	22.3%	4.8%	11.0%

The respondents were asked a series of questions regarding their shopping preferences. The first question was whether they purchased Caribbean products over international products. The respondents on average indicated that they sometime purchase Caribbean products over international products. There are some differences between countries with Trinidad and Tobago and St. Lucia respondents being significantly more likely than those in the other countries to purchase Caribbean products over international products.

The respondents indicated that it is important that their food products are produced in the Caribbean. Respondents in St. Lucia and Trinidad and Tobago believe that their food is produced in the Caribbean than residents of the other countries. Interestingly, Barbados respondents were rated the importance of Caribbean produced food as being somewhat important.

The respondents overall did not rate a stores selection of Caribbean produced food products as impacting where they shop. Interestingly, the selection of Caribbean produced foods impacting where people shop was significantly higher in St. Lucia and the other countries and was least impactful in Antigua and Barbuda and Barbados.

Local food production is only slightly more important to the respondents in each of the countries than is whether the food is produced in the Caribbean. This suggests that the respondents associate Caribbean food products as being locally produced.

Product Preferences						
	Country					
	A&B (A) (n=88)	Bahamas (B) (n=96)	Barbados (C) (n=91)	St Lucia (D) (n=103)	T&T (E) (n=104)	Total
When shopping, do **you buy Caribbean produced products over those produced internationally**? 1=never, 2= sometimes, 3= yes always	2.06	2.15	2.16	2.38 A,B,C	2.32 A,B,C	2.17
How important is it to you that a food product is **produced in the Caribbean**? *3=very, 2= somewhat, 1= not at all*	2.46 C	2.44 C	2.14	2.61 A,B,C	2.63 A,B,C	2.38
Does a store's **selection** of Caribbean produced food products affect where you shop?	1.48	1.65 A,C	1.40	1.88 A,B,C,E	1.64 A,C	1.64

3=very, 2= somewhat, 1= does not matter						
How important is it to you that a food product is **produced locally in (your country)**? *3=very, 2= somewhat, 1= not at all*	2.44 [C]	2.49 [C]	2.30	2.49 [C]	2.64 [A,B,CD]	2.41
[A,B,C,D,E] The value is significantly different than the value in A,B,C,D,E						

As important as it is to respondents that food is locally produced or produced in the Caribbean it does not necessarily impact where they shop.

The respondents were likely to purchase Caribbean produced products over internationally product products and it is important that products are produced in the Caribbean. Those in the $7,500-$14,999 income category indicated that it is important that their food products are produced in the Caribbean. With regard to Caribbean food product availability, the same income group was significantly more likely to indicate that a store's selection of Caribbean products will impact where they shop.

All of the respondents indicated that it is important for them that their food product is locally produced. Again, the $7,500-$14,999 income category rated this significantly more important than the other income groups.

Satisfaction with Local, Regional and International Products					
	Income				
	Less than $7,500 (A)	$7,500 - $14,999 (B)	$15,000- $24,999 (C)	$25,000- $34,999 (D)	$35,000 or more (E)
When shopping, do **you buy Caribbean produced products over those produced internationally**? 1=never, 2= sometimes, 3= yes always	2.24	2.29	2.21	2.11	2.16
How important is it to you that a food product is **produced in the Caribbean**? *3=very, 2= somewhat, 1= not at all*	2.46	2.59 [C,D,E]	2.32	2.34	2.21
Does a store's **selection** of Caribbean produced food products affect where you shop? *3=very, 2= somewhat, 1= does not matter*	1.56	1.79 [C,D,E]	1.65	1.63	1.79
How important is it to you that a food product is **produced locally in (your country)**? *3=very, 2= somewhat, 1= not at all*	2.46	2.53 [E]	2.37	2.41	2.33

[A,B,C,D,E] The value is significantly different than the value in A,B,C,D,E

There were some differences in respondent's answers by their level of education. Respondents with a secondary education were significantly less likely to be satisfied with their store's selection of international products than the other respondents.

There appears to be an inverse relationship between level of education and satisfaction with the availability of local, Caribbean, and international products at area stores.

Satisfaction with Local, Regional, and International Food Products				
	Education Level			
	Primary (A)	Secondary (B)	Tertiary (C)	University (D)
Are you **satisfied** with the **amount of local products** at your grocery store? *5= highly,4=somewhat,3=neutral,2=dissatisfied,1= don't carry*	2.35 [D]	2.21	2.17	2.13
Are you **satisfied** with the **amount of regional Caribbean** products at your grocery store? *5= highly,4=somewhat,3=neutral,2=dissatisfied,1= don't carry*	2.44	2.52 [D]	2.36	2.26
Are you **satisfied** with the **amount of International products** at your grocery store? *5= highly,4=somewhat,3=neutral,2=dissatisfied,1= don't carry*	1.76	1.49 [A,C,D]	1.67	1.75
How important is it to you that a food product is produced locally in (your country)? 3=very, 2= somewhat, 1= not at all	2.38	2.53	2.37	2.38
[A,B,C,D] The value is significantly different than the value in column A,B,C,D				

The respondents were asked about their level of satisfaction with the amount of locally, regionally and international food products at their grocery store. Interestingly, they were very satisfied on average with the amount of international food products their grocery store carried. Satisfaction fell significantly as they were asked about regional and then local food product availability. The respondents were least satisfied with local food products, significantly less satisfied than they were with regional and international products.

The respondents were also significantly less satisfied with regional food product availability than they were with international brands.

Satisfaction with Local, Regional, and International Food Products		
	Country	

	A&B (A) (n=88)	Bahamas (B) (n=96)	Barbados (C) (n=91)	St Lucia (D) (n=103)	T&T (E) (n=104)	Total
Are you **satisfied** with the **amount of local products** at your grocery store? *5= highly,4=somewhat,3=neutral,2=dissatisfied,1= don't carry*	3.33	3.59 ACD	3.46 DE	3.32	3.21	3.34
Are you **satisfied** with the **amount of regional Caribbean** products at your grocery store? *5= highly,4=somewhat,3=neutral,2=dissatisfied,1= don't carry*	3.57	3.54	3.69	3.54	3.46 C	3.55
Are you **satisfied** with the **amount of International products** at your grocery store? *5= highly,4=somewhat,3=neutral,2=dissatisfied,1= don't carry*	4.19,B CDE	3.78	3.67	3.82 C	3.71	3.82
A,B,C,D,E The value is significantly different than the value in column A,B,C,D,E						

Respondents in the Bahamas and Barbados were significantly more satisfied with local food availability in their grocery stores than were their counterparts in other countries. This difference was not as pronounced when they rated their satisfaction with regionally produced products. Residents in Antiqua and Barbuda were significantly more satisfied with the availability of international products than the respondents in other countries.

The respondents in the lowest income category were significantly more satisfied with local products at their store than other respondents. The two lowest income categories are significantly more satisfied with their store's Caribbean and international product selection. The respondents in all countries are not satisfied with the variety and range of Caribbean product offering.

Satisfaction with Local, Regional, and International Food Products					
	Income				
	Less than $7,500 (A)	$7,500-$14,999 (B)	$15,000-$24,999 (C)	$25,000-$34,999 (D)	$35,000 or more (E)
Are you **satisfied** with the **amount of local products** at your grocery store?	3.57 B,C,D,E	3.35	3.41	3.19	3.28

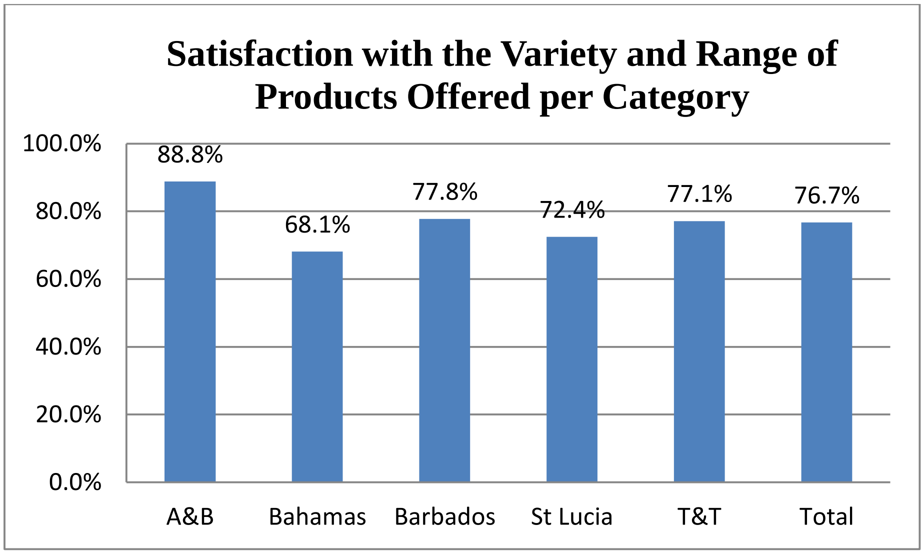
5= highly,4=somewhat,3=neutral,2=dissatisfied,1= don't carry					
Are you **satisfied** with the **amount of regional Caribbean** products at your grocery store? *5= highly,4=somewhat,3=neutral,2=dissatisfied,1= don't carry*	$3.71^{D,E}$	$3.59^{D,E}$	3.54	3.47	3.46
Are you **satisfied** with the **amount of International products** at your grocery store? *5= highly,4=somewhat,3=neutral,2=dissatisfied,1= don't carry*	$3.96_{A,B,C}$	$3.56^{D,E}$	3.66	4.00	3.94
I am satisfied with the variety of range of products offered per category 1= yes, 2= no	1.79	1.79	1.78	1.72	1.82
^{A,B,C,D,E} The value is significantly different than the value in column A,B,C,D,E					

Respondents with primary and secondary levels of education were significantly more satisfied with the amount of local products their store offered than the other respondents. Respondents with a secondary level of education were significantly more satisfied with their store's selection of Caribbean products than the other respondents.

Satisfaction with Local, Regional, and International Food Products				
	Education Level			
	Primary (A)	Secondary (B)	Tertiary (C)	University (D)
Are you **satisfied** with the **amount of local products** at your grocery store? *5= highly,4=somewhat,3=neutral,2=dissatisfied,1= don't carry*	$3.53^{C,D}$	$3.51^{C,D}$	3.27	3.21
Are you **satisfied** with the **amount of regional Caribbean** products at your grocery store? *5= highly,4=somewhat,3=neutral,2=dissatisfied,1= don't carry*	3.50	$3.72^{A,C,D}$	3.48	3.48
Are you **satisfied** with the **amount of International products** at your grocery store? *5= highly,4=somewhat,3=neutral,2=dissatisfied,1= don't carry*	3.79	3.81	3.75	3.94
I am satisfied with the variety of range of products offered per category 1= yes, 2= no	1.91	1.80	1.79	1.74
^{A,B,C,D} The value is significantly different than the value in column A,B,C,D				

None of the respondents were satisfied with the variety and range of products offered in each of the nine categories being investigated. This suggests that there is an opportunity to increase local and Caribbean product offering in the area stores.

The respondents were asked how satisfied they were with the variety of range of products offered per category. Overall, over three quarters of all the respondents were satisfied with the range and variety of products offered per category. Interestingly, respondents in Antiqua and Barbuda are more satisfied than their counterparts in other companies, significantly more so than respondents in the Bahamas.



There is a three tier breakdown of the respondent's satisfaction with Caribbean products in their grocery store where they were interviewed. The respondents are most satisfied with the crackers and the pepper sauces categories than the other categories, significantly more than they are with coffee, coconut oil, and gluten free products. Respondents in Barbados rated both crackers and pepper sauce categories significantly higher than other respondents.

Fruit juices, sugars, Rum cakes, and jams and jellies product categories fall into the second tier level of satisfaction. There are a couple notable differences between countries in this group. Respondents from St. Lucia and Antiqua and Barbuda rated satisfaction with the honey category than their counterparts from the other countries. Barbados respondents rated satisfaction with the rum cake category significantly higher than the other respondents while Trinidad and Tobago respondents rated them significantly lower than the other respondents.

Average Level of Satisfaction with Caribbean Produced Products in Store Where 5= Highly, 4= somewhat, 3= Neutral,2=Dissatisfied, 1=Never Purchase						
	Country					
Product Category	St Lucia (A)	A&B (B)	Barbados (C)	T&T (D)	Bahamas (E)	Total

Crackers and biscuits, cookies	4.25	4.33	4.45 [A,B,D,E]	4.14	4.21	4.18
Pepper sauces, pepper jellies, chutneys, jerk sauces & marinades	4.34	4.01	4.52 [A,B,D,E]	4.21	4.15	4.15
Fruit juices and concentrates, bottled coconut water	4.11	4.17	4.27	4.36 [A,B,E]	4.10	4.08
Sugar, honey and syrup	4.26 [D,E]	4.23 [D,E]	4.15	4.00	3.95 [A,B,D]	4.05
Rum cakes, baked goods such as bread, pastries	4.13	4.10	4.32 [A,B,D]	3.71 [A,B,C,E]	4.17	4.03
Jams, jellies, fruit butters and cheeses, indigenous confectionery pepper wines, dried pepper	4.13	3.95 [A,C,E]	4.27	3.96 [A,C,,E]	4.19	4.02
Coffee and herbal teas	4.14 [B,C,D]	3.51 [A,B,D,E]	3.74	3.75	3.99 [A,B,C,D]	3.79
Coconut oil (incl. virgin)	4.26 [B,C,D,E]	3.36 [A,C,,D,E]	3.60	3.59	3.67	3.70
Gluten free breads/pancake/waffle mixes	3.82 [B,C,D,E]	2.93 [A,C,D,E]	3.42	3.25	3.41	3.37

[A,B,C,D,E] The value is significantly different than the value in column A,B,C,D,E

Respondents in St. Lucia rated the coffee, coconut oil, and gluten free categories significantly higher than most of the other respondents. Respondents from Antiqua and Barbuda rated these same categories significantly lower than most of the other respondents.

Examining the data by income category, it appears that those earning between $15,000 and $24,999 have a higher average level of satisfaction with Caribbean product availability in the store than other income categories for the pepper sauce, rum cake, and jam categories.

The upper two income categories have a lower level of average satisfaction with the store's availability of the fruit, coffee, coconut oil, cracker, gluten free, and sugar categories than the other respondents.

Average Level of Satisfaction with Caribbean Produced Products in Store
Where 5= Highly, 4= somewhat, 3= Neutral,2=Dissatisfied, 1=Never Purchase

	Income				
Product Category	Less than $7,500 (A)	$7,500-$14,999 (B)	$15,000-$24,999 (C)	$25,000-$34,999 (D)	$35,000 or more (E)
Pepper sauces, pepper jellies, chutneys, jerk sauces & marinades	4.18	4.21	4.51 [A,B,D,E]	3.96 [A,B,C,E]	4.29

Rum cakes, baked goods such as bread, pastries	4.02	4.21 [A,D,E]	4.29 [A,D,E]	4.02	4.05
Jams, jellies, fruit butters and cheeses, indigenous confectionery pepper wines, dried pepper	4.13	4.18	4.25[D,E]	4.04	4.00
Fruit juices and concentrates, bottled coconut water	4.26	4.15	4.12	4.26	3.85 [A,B,C,D]
Coffee and herbal teas	4.01	3.86	4.00	3.73 [A,C,E]	3.51 [A,B,C,D]
Coconut oil (incl. virgin)	3.93	4.01	4.10	3.29 [A,B,C]	3.46 [A,B,C,D]
Crackers and biscuits, cookies	4.30	4.35	4.25	4.14 [A,B]	4.17 [A,B]
Gluten free breads/pancake/waffle mixes	3.61	3.73	3.61	2.96 [A,B,C]	3.12 [A,B,C]
Sugar, honey and syrup	4.19	4.18	4.25	3.94 [A,B,C]	3.91 [A,B,C]
[A,B,C,D,E] The value is significantly different than the value in column A,B,C,D,E					

The data in the following table indicate that there are some differences in the level of satisfaction a respondent has with the selection of the store's offering of Caribbean products by level of education. The university educated respondents were less satisfied with the store's selection of Caribbean products on all the categories except for the pepper sauce category. There appears to be a negative relationship between level of education and satisfaction with Caribbean product availability.

Average Level of Satisfaction with Caribbean Produced Products in Store Where 5= Highly, 4= somewhat, 3= Neutral,2=Dissatisfied, 1=Never Purchase				
	Education Level			
Product Category	Primary (A)	Second ary (B)	Tertiary (C)	University (D
Pepper sauces, pepper jellies, chutneys, jerk sauces & marinades	4.12	4.29	4.09	4.12
Rum cakes, baked goods such as bread, pastries	4.21	4.16	4.04	3.89 [A,B,C]
Jams, jellies, fruit butters and cheeses, indigenous confectionery pepper wines, dried pepper	4.06	4.08	4.09	3.91 [A,B,C]
Fruit juices and concentrates, bottled coconut water	4.29	4.23	4.09	3.86 [A,B,C]
Coffee and herbal teas	4.26[B,C,D]	3.84	3.85	3.48 [A,B,C]
Coconut oil (incl. virgin)	4.59[B,C,D]	3.87	3.65	3.37
Crackers and biscuits, cookies	4.42 [C,D]	4.28	4.18	4.02
Gluten free breads/pancake/waffle mixes	3.65 [C,D]	3.54	3.48	3.02
Sugar, honey and syrup	4.26[,D]	4.18	4.07	3.81
[A,B,C,] The value is significantly different than the value in column A,B,C,D				

The respondents were asked to rate nine food groups in terms of their preferences with regard to local, regional (Caribbean), and international brands. They were asked to rank each food category using 1 for favorite, 2 for second choice and 3 for third choice. The information in the table below presents the percent of respondents that rated local, regional, and international as a 1 or their preferred brand.

Interestingly, there are some significant differences between the countries. St. Lucia in general was less likely to prefer local products when compared to the respondents from other countries. Respondents from Barbados and Trinidad and Tobago, in general, rate local as their favorite more often than their corresponding respondents in other counties.

Preference for local, regional, and international products. The figures represent the preference percentage of the respondents

	Country					
Product Category	St Lucia (A)	A&B (B)	Barbados (C)	T&T (D)	Bahamas (E)	Total
Pepper sauces, pepper jellies, chutneys, jerk sauces & marinades						
Local	76.9%	83.1%	88.2%	95.8%	97.1% A	89.0%
Regional	14.1%	13.5%	7.1%	4.3%	1.0%	8.20%
International	9.0%	3.4%	4.7%	0.0%	2.0%	2.8%
Rum cakes, baked goods such as bread, pastries						
Local	84.8%	90.6%	94.1%	88.3%	91.2%	89.9%
Regional	6.3%	5.9%	1.2%	2.1%	2.9%	2.7%
International	8.9%	3.5%	4.7%	9.6%	5.9%	7.4%
Jams, jellies, fruit butters and cheeses, indigenous confectionery pepper wines, dried pepper						
Local	64.4%	85.4% A	77.9%	83.5% A	77.9%	78.20%
Regional	23.3%	11.0%	10.5%	9.9%	5.8%	11.5%
International	12.3%	3.7%	11.6%	6.6%	16.3%	10.3%
Fruit juices and concentrates, bottled coconut water						
Local	68.4%	72.8%	84.9% A	90.4% A	87.5% A	81.5%
Regional	21.5%	11.1%	7.0%	9.6%	4.8%	10.4%

International	10.1%	16.1%	8.1%	0.0%	7.7%	8.1%
Coffee and herbal teas						
Local	54.8% [D]	69.5%	47.9% [C,D]	80.7%	59.0% [D]	63.00%
Regional	24.7%	9.8%	21.9%	9.1%	10.0%	14.4%
International	20.5%	20.7%	30.2%	10.2%	31.0%	22.6%
Coconut oil (incl. virgin)						
Local	73.2%	82.9%	65.2%	90.0% [C]	84.8%	80.2%
Regional	15.5%	11.8%	17.4%	12.2%	0.0%	11.9%
International	11.3%	5.3%	17.4%	-2.2%	15.2%	7.9%
Crackers and biscuits, cookies						
Local	46.8% [B,C,D,E]	69.7% [A,C]	90.8%	76.1%	68.3%	70.7%
Regional	31.6%	11.8%	5.7%	14.8%	4.8%	13.1%
International	21.5%	18.4%	3.5%	9.1%	26.9%	16.1%
Gluten free breads/pancake/waffle mixes						
Local	50.7%	69.9%	66.2%	80.5% [A,D]	56.8%	65.0%
Regional	16.4%	6.8%	8.1%	12.2%	6.3%	9.7%
International	32.9%	23.3%	25.7%	7.3%	36.9%	25.3%
Sugar, honey and syrup						
Local	63.2%	79.8%	87.8% [A]	90.5% [A]	78.2%	80.4%
Regional	23.7%	7.1%	6.1%	4.2%	15.8%	11.2%
International	13.10%	13.10%	6.10%	5.30%	6.00%	8.40%
[A,B,C,D,E] The value is significantly different than the value in column A,B,C,D,E						

2. Pepper sauces, rum cakes, fruit juices, coconut oil, and sugar categories had the highest local number one ratings of the nine product categories. The gluten free and coffee categories had the lowest local number one ratings.

   The respondents from Antiqua and Barbuda were significantly less likely to purchase organic products than the respondents of other countries. The respondents in St. Lucia were significantly more likely than the respondents in other countries to purchase organic products over non-organic products.

The majority of the respondents in each country would recommend any of the products listed in the nine product categories to their friends and family. The respondents in Barbados and Trinidad and Tobago were significantly more likely to recommend these products than the respondents in the other countries.

Organic and Fair Trade Perceptions						
	Country					
Labels	St Lucia (A)	A&B (B)	Barbados (C)	T&T (D)	Bahamas (E)	Total
Would purchase organic over non-organic products? *5= extremely,4= very likely, 3= moderately, 2=slightly, 1= not at all likely*	3.99[B,C,D,E]	2.96 [A,C,D,E]	3.38 [A,B,D,E]	3.64	3.67 [A,B,C]	3.48
Would you recommend any of the Caribbean produced products previously discussed to family and friends *5= extremely,4= very likely, 3= moderately, 2=slightly, 1= not at all likely*	4.27	4.16	4.39 [B,C,D,E]	4.59 [A,B,C,E]	4.18	4.18
Do fair trade products present a market opportunity? *5= extremely,4= very likely, 3= moderately, 2=slightly, 1= not at all likely*	3.70	2.99 [A,C,D,E]	3.33 [A,B,D,E]	3.70[,B,C,E]	3.55 [A,B,C,D]	3.44
Are you familiar with Fair Trade Labels 1= yes, 2=n0	1.60 [B,C,D,E]	1.27	1.39	1.36	1.33	1.43
Do you pay attention to a fair trade label? Don’t Know, 1=Yes, 2=No	1.47	1.99 [A,C,D,E]	1.24 [A,B,D]	1.80 [A,B,C,E]	1.23 [A,B,D]	1.32
[A,B,C,D,E] The value is significantly different than the value in A,B,C,D,E						

Most of the respondents in every County are not particularly aware of fair trade products, especially in St. Lucia. The respondents in all of the countries do not really pay attention to fair trade labels, especially in Antigua and Barbuda and Trinidad and Tobago. Respondents that earn between \$7,500-\$14,999 and those making over \$35,000 annually are significantly more likely to think that fair trade products have an opportunity. Does not appear that the respondents are familiar with fair trade labels and they do not pay attention to them.

Organic and Fair Trade Perceptions					
	Income				
Labels	Less than $7,500 (A)	$7,500-$14,999 (B)	$15,000-$24,999 (C)	$25,000-$34,999 (D)	$35,000 or more (E)
Would purchase organic over non-organic products? *5= extremely,4= very likely, 3= moderately, 2=slightly, 1= not at all likely*	3.54	3.78 [A,C,D]	3.49	3.49	3.75 [A,C,D]
Would you recommend any of the Caribbean produced products previously discussed to family and friends *5= extremely,4= very likely, 3= moderately, 2=slightly, 1= not at all likely*	4.20	4.20	4.38 [A,B,]	4.26	4.27
Do fair trade products present a market opportunity? *5= extremely,4= very likely, 3= moderately, 2=slightly, 1= not at all likely*	3.50	3.67 [C,D]	3.48	3.34	3.65 [C,D]
Are you familiar with Fair Trade Labels 1= yes, 2=n0	1.41	1.49	1.46	1.40	1.49
Do you pay attention to a fair trade label? Don't Know, 1=Yes, 2=No	1.29	1.40	1.31	1.28	1.37
[A,B,C,D,E] The value is significantly different than the value in A,B,C,D,E					

The respondents with a primary education rated fair trade significantly less of an opportunity than the other respondents. There is a positive relationship paying attention to fair trade labels and level of education.

Organic and Fair Trade Perceptions				
	Education Level			
Labels	Primary (A)	Secondary (B)	Tertiary (C)	University (D)
Would purchase organic over non-organic products?	3.68 [C]	3.48	3.35	3.56
Would you recommend any of the Caribbean produced products previously discussed to family and friends	4.27	4.21	4.08 [,D]	4.28

Do fair trade products present a market opportunity?	3.09 [B,C,D]	3.44	3.42	3.52
Are you familiar with Fair Trade Labels 1= yes, 2=n0	1.30 [D]	1.37	1.44	1.50
Do you pay attention to a fair trade label? Don't Know, 1=Yes, 2=No	1.16 [,D]	1.33	1.30	1.37
[A,B,C,D] The value is significantly different than the value in A,B,C,D				

The respondents were asked to rate Caribbean products with international products on a series of product attributes. There are three levels of agreement denoted by color lines in the following table. Overall, the respondents had a favorable opinion of Caribbean products compared to international products across all categories. The respondents agreed strongly that the taste and flavor Caribbean products were better than competing international brands.

The second tier of agreement included packaging, visual appeal, ingredients and healthy. There were some notable differences in this tier of attributes. The respondents in Antiqua and Barbuda were significantly less likely to agree with appetizing and easy to read packaging attributes than were their counterparts in other countries.

Quality Comparison of Caribbean Foods Versus International Brands **Where 5= strongly agree, 4= some agree, 3= Neutral,2=Somewhat disagree, 1=Strongly disagree**						
	Country					
Product Category	St Lucia (A)	A&B (B)	Barbados (C)	T&T (D)	Bahamas (E)	Total
Tasty and flavorful	4.62 [,B,D,E]	4.28	4.57 [,B,D]	4.37	4.50	4.43
Packaging easy to open	4.28	4.20	4.25	4.33	4.27	4.21
Looks appetizing	4.33	4.02 [A,C,D,E]	4.31	4.27	4.28	4.20
Packaging easy to read	4.28	4.08 [A,,C,E]	4.30	4.12 [A,,C,E]	4.28	4.17
Quality ingredients	4.25	4.19	4.25	4.07	4.17	4.14
Healthy	4.30 [C,D,E]	4.33 [C,D,E]	4.13	4.04	4.14	4.14
Texture of the Product	4.28	3.87	4.04	3.93	4.01	4.00
Appearance of packaging is pleasing	4.07 [B,E]	3.67 [A,C,D]	3.95	4.30 [A,B,C,E]	3.83 [A,B,]	3.90
Price – good value for dollar	3.88	3.74	3.88	3.67 [A,C,E]	4.04 [A,B,D]	3.83

Longer Shelf Life	3.86	3.66 [A,C,D]	3.92	3.59 [A,C,D]	3.76	3.73
Caribbean products are coming from a trusted worthy source that meet quality standards	4.08	4.28 [A,D]	4.14	3.73 [A,B,C,E]	4.13	4.07
[A,B,C,D,E] The value is significantly different than the value in A,B,C,D,E						

Respondents from Trinidad and Tobago are less likely to agree that Caribbean products are being produced by trust worthy food manufacturers. Respondents from Antiqua and Barbuda are more likely than their counterparts to think that Caribbean food is manufactured by trustworthy companies.

Looking at the same data by income level reveals that those respondents that make $25,000 and more, agree less strongly than their counterparts in lower income brackets. This is true across all of the product attributes. This suggests that higher income respondents are less likely to think Caribbean products are better than their international competitors. However, the level of agreement suggests that they do agree that the Caribbean products are better than their international counterparts on the listed attributes.

Quality Comparison of Caribbean Foods Versus International Brands **Where 5= strongly agree, 4= some agree, 3= Neutral,2=Somewhat disagree, 1=Strongly disagree**					
	Income				
Product Category	Less than $7,500	$7,500 - $14,999	$15,000- $24,999	$25,000- $34,999	$35,000 or more
Tasty and flavorful	4.61	4.56	4.55	4.35	4.35
Looks appetizing	4.33	4.36	4.28	4.13	4.10
Appearance of packaging is pleasing	4.06	4.00	4.05	3.76	3.77
Packaging easy to read	4.34	4.31	4.34	4.00	4.08
Quality ingredients	4.26	4.36	4.21	4.07	4.06
Packaging easy to open	4.34	4.30	4.27	4.13	4.06
Price – good value for dollar	3.99	4.04	3.93	3.47	3.75
Texture of the Product	4.02	4.23	4.06	3.91	3.88
Healthy	4.19	4.42	4.10	4.07	3.80
Longer Shelf Life	3.82	4.05	3.99	3.42	3.39
Caribbean products are coming from a trusted worthy source that meet quality standards	4.20	4.21	4.22	3.91	3.91
[A,B,C,D,E] The value is significantly different than the value in A,B,C,D,E					

The respondents that reported having a primary or secondary education were more likely than respondents in the other educational categories to agree that Caribbean products are better than their international counterparts. The respondents that reported having a secondary education agreed more so than the other groups, even the respondents with a primary education.

Quality Comparison of Caribbean Foods Versus International Brands **Where 5= strongly agree, 4= some agree, 3= Neutral,2=Somewhat disagree, 1=Strongly disagree**				
	Education Level			
Product Category	Primary	Secondary	Tertiary	University
Tasty and flavorful	4.41	4.60	4.32	4.38
Looks appetizing	4.38	4.44	4.07	4.03
Appearance of packaging is pleasing	3.97	4.18	3.81	3.67
Packaging easy to read	4.35	4.41	4.06	3.95
Quality ingredients	4.00	4.29	4.09	4.04
Packaging easy to open	4.42	4.36	4.14	4.04
Price – good value for dollar	3.71	4.09	3.78	3.62
Texture of the Product	3.91	4.17	3.92	3.91
Healthy	4.42	4.31	4.09	3.84
Longer Shelf Life	3.65	3.89	3.82	3.47
Caribbean products are coming from a trusted worthy source that meet quality standards	4.09	4.24	4.04	3.93
[A,B,C,D,E] The value is significantly different than the value in A,B,C,D,E				

The respondents were asked to rate nine food groups in terms of their perceived value with regard to local, regional (Caribbean), and international brands. They were asked to rank each food category using 1 for favorite, 2 for second choice and 3 for third choice. The information in the table below presents the percent of respondents that rated local, regional, and international as a 1 or their perceived best value.

Interestingly, there are some significant differences between the countries. St. Lucia in general was less likely to prefer local products when compared to the respondents from other countries. Respondents from Barbados and Trinidad and Tobago, in general, rate local as their favorite more often than their corresponding respondents in other counties.

Do you believe the following products provide better value for your dollar when they are produced?						
	Country					
Product Category	St Lucia (A)	A&B (B)	Barbados (C)	T&T (D)	Bahamas (E)	Total
Pepper sauces, pepper jellies, chutneys, jerk sauces & marinades						
Local	68.1% [B,C,D,E]	82.1%	90.7%	93.7%	92.9%	86.5%

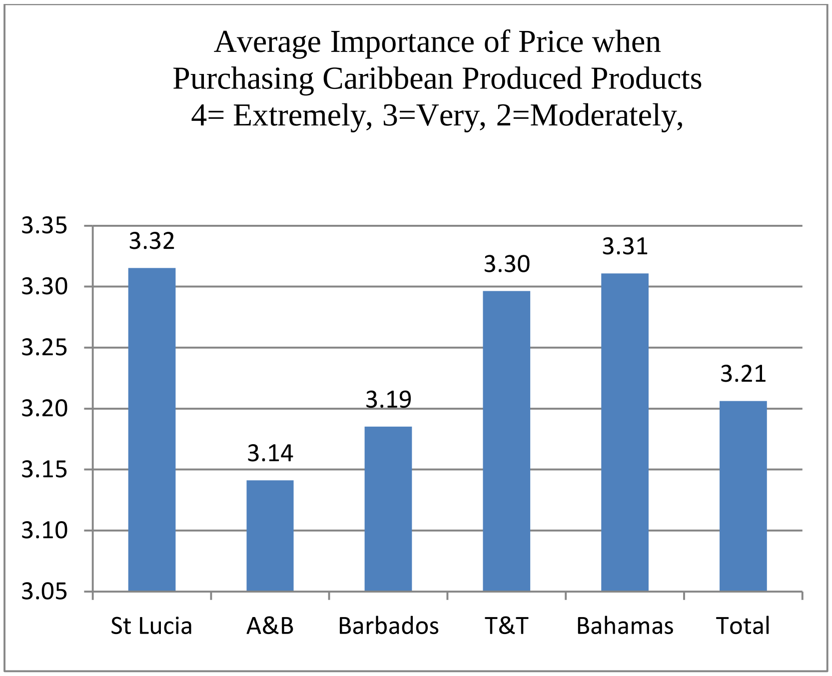
Regional	18.1%	14.3%	4.7%	5.3%	3.0%	8.5%
International	13.8%	3.6%	4.6%	1.0%	4.1%	5.0%
Rum cakes, baked goods such as bread, pastries						
Local	81.1%	81.9%	93.9%	93.3%	87.4%	87.7%
Regional	10.8%	8.4%	1.2%	10.0%	7.4%	7.5%
International	8.1%	9.6%	4.9%	-3.3%	5.3%	4.7%
Jams, jellies, fruit butters and cheeses, indigenous confectionery pepper wines, dried pepper						
Local	61.6% [B,C,D,E]	79.5%	79.5%	80.7%	80.6%	76.9%
Regional	15.1%	16.7%	10.3%	15.9%	4.1%	12.0%
International	23.3%	3.8%	10.2%	3.4%	15.3%	11.1%
Fruit juices and concentrates, bottled coconut water						
Local	64.9%	73.0%	86.1% [A,B]	90.8% [A,B]	83.7% [A]	80.3%
Regional	21.6%	13.5%	7.6%	13.8%	4.1%	11.7%
International	13.5%	13.5%	6.3%	-4.6%	12.2%	8.0%
Coffee and herbal teas						
Local	54.9%	77.6% [A,C,E]	50.7%	78.4% [A,C,E]	58.8%	64.6%
Regional	15.5%	14.5%	21.7%	11.4%	9.3%	14.0%
International	29.6%	7.9%	27.6%	10.2%	31.9%	21.4%
Coconut oil (incl. virgin)						
Local	66.2%	76.1%	61.2%	85.9% [A,B,C,]	82.4% [A,B,C]	75.3%
Regional	14.1%	11.3%	17.9%	15.3%	6.6%	12.7%
International	19.7%	12.6%	20.9%	-1.2%	11.0%	12.0%
Crackers and biscuits, cookies						
Local	51.4% [B,C,D,E]	69.6%	85.7% [A,B,E]	78.6%	67.7%	71.2%
Regional	22.9%	11.4%	2.4%	16.7%	6.1%	11.3%
International	25.7%	19.0%	11.9%	4.8%	26.3%	17.5%

Gluten free breads/pancake/waffle mixes						
Local	52.5%	68.1% [A,]	57.1%	78.8% [A,C,E]	56.8%	63.1 %
Regional	11.9%	8.7%	8.6%	12.5%	5.7%	9.3%
International	35.6%	23.2%	34.3%	8.7%	37.5%	27.6 %
Sugar, honey and syrup						
Local	67.1% [C,D,E]	78.6%	81.3%	84.0%	83.0%	79.1 %
Regional	12.3%	11.9%	7.5%	18.7%	7.0%	11.2 %
International	20.6%	9.5%	11.2%	-2.7%	10.0%	9.7%
[A,B,C,D,E] The value is significantly different than the value in column A,B,C,D,E						

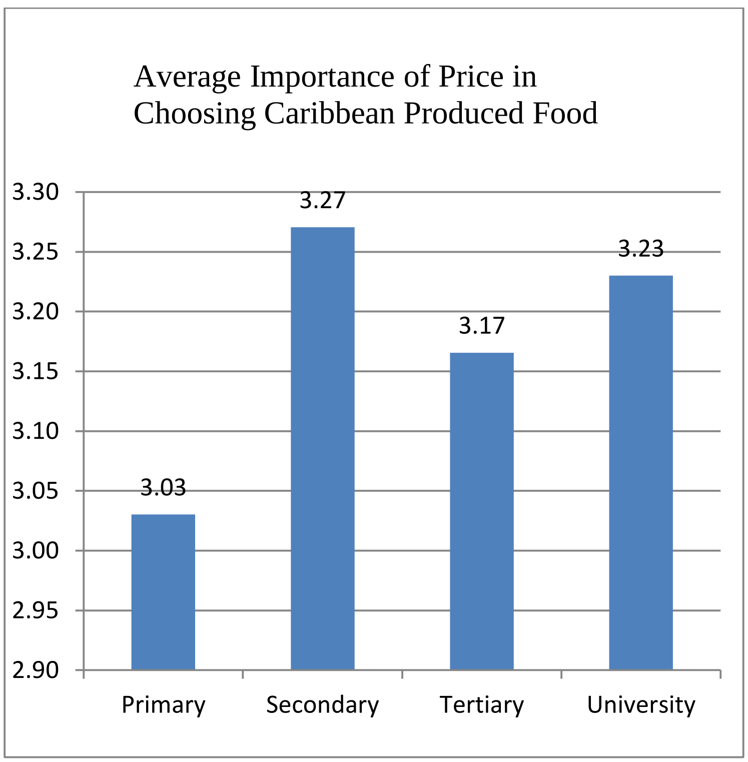
Being locally produced was most important in the pepper, rum cake, fruit juices, and sugar categories with over 80% of the respondents rating local as the preferred manufacturer.

The being produced locally for the coffee and gluten free categories appears to be less important than for the other remaining categories.

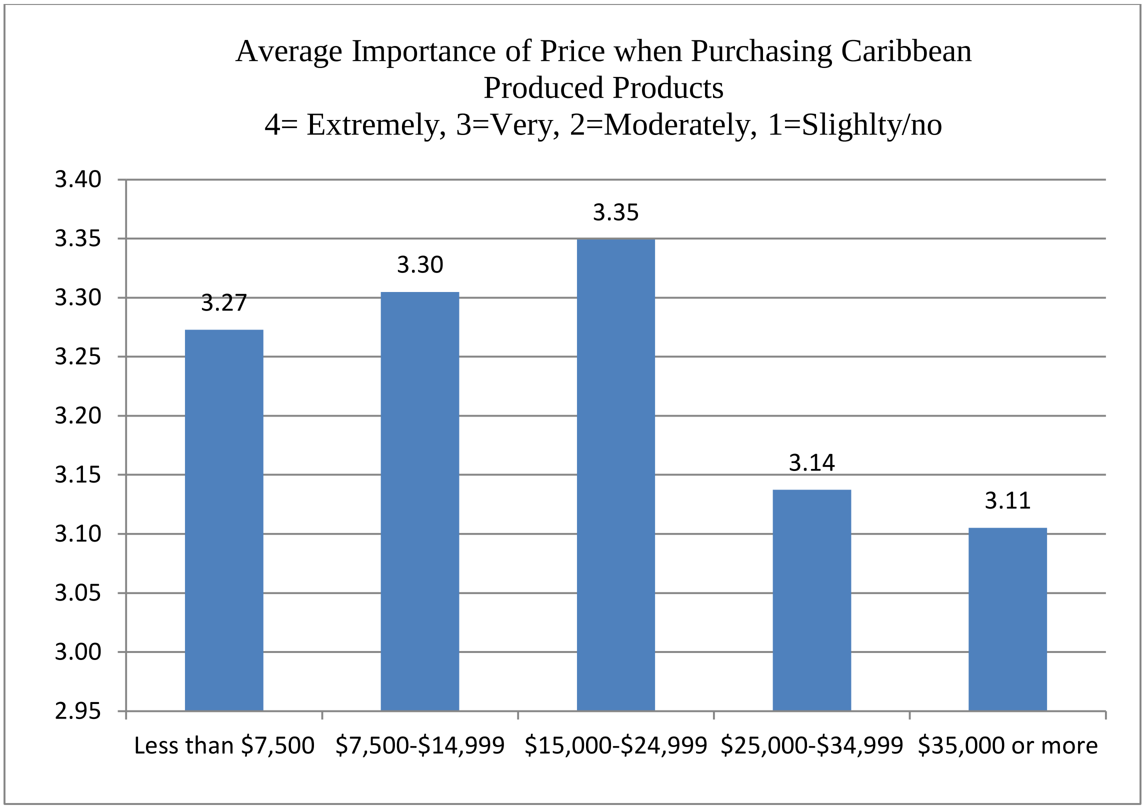
The respondents were asked how important price was in their decision to purchase Caribbean based food products. On average, the respondents indicated that price was very important in their decision to purchase Caribbean produced food products. However, the respondents in Antiqua and Barbuda and those in Barbados were significantly less likely to indicate that price was an important than their counter parts in other counties.



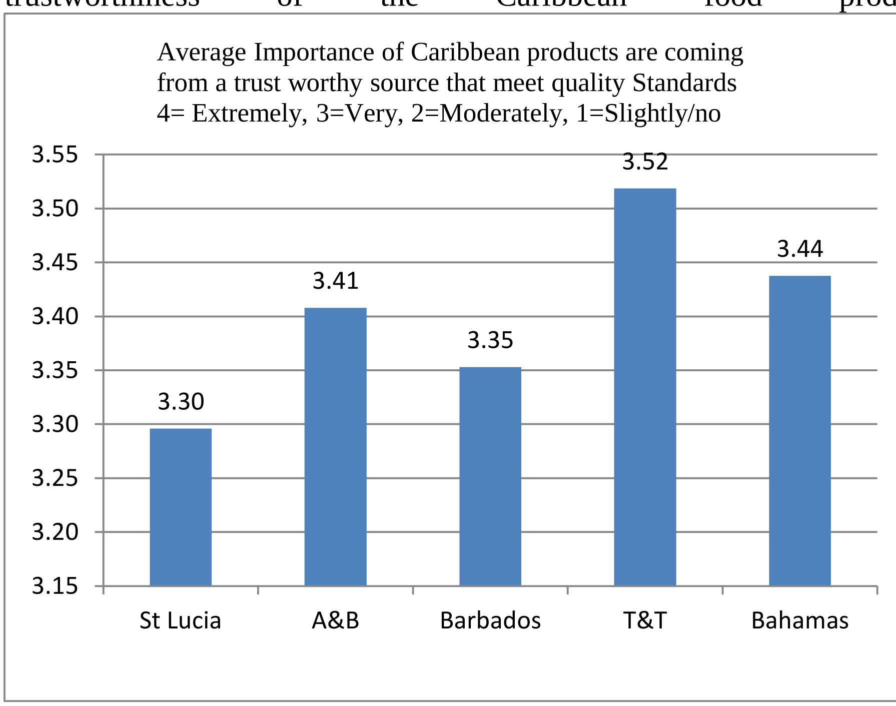
The impact of price appears to be significantly less important amount those that have a primary education that their more educated counterparts.



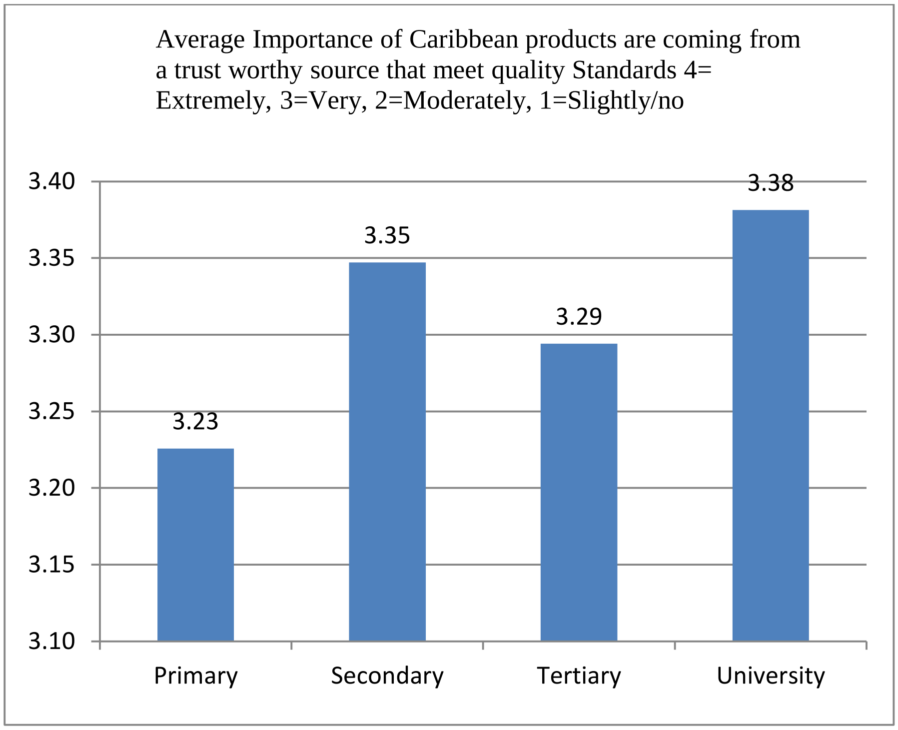
Respondents making under $25,000 annually were more price conscious than were their higher earning counterparts. These differences were significant. The upper two income brackets were similar in their rating the importance of purchasing Caribbean food products.



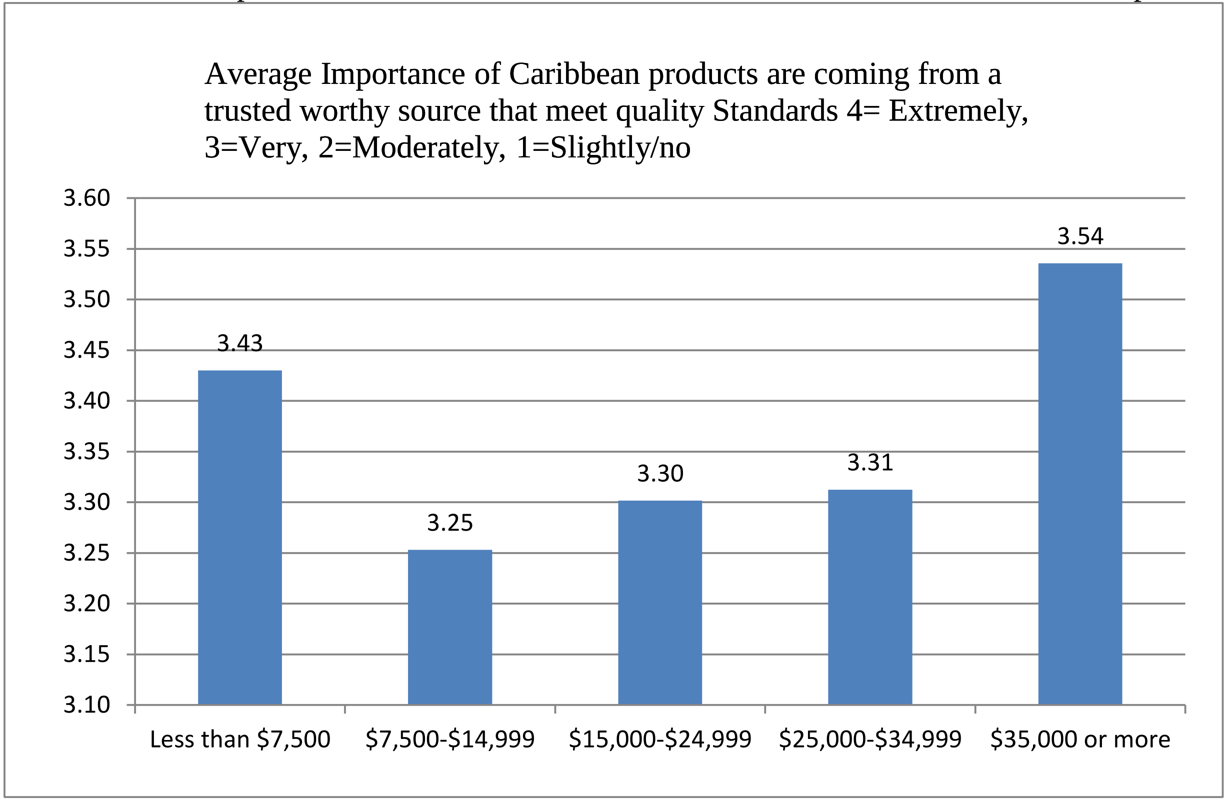
The respondents from Trinidad and Tobago are significantly more likely than their counter parts from St. Lucia, Antiqua and Barbuda, and Barbados to be concerned with the trustworthiness of the Caribbean food product manufacturers.



3. The respondents with a primary education were noticeably less likely to worry about Caribbean products being produced from a trust worthy source than were their more educated counterparts.



Interestingly, the respondents in the highest income bracket and those in the lowest income bracket rated the importance of Caribbean products being produced by a trust worthy company more important than their other counterparts.



Statistical analysis was performed on the data set. Correlations were performed between demographic variables and the other variables in the study to estimate any relationships. The data did not appear to reveal any strong correlations. There were significant relationships found between variables but they were not strong enough to report in the analysis.

The following provides demographic information of the respondents from each country. Trinidad and Tobago and the Bahamas had a more equal sample of males and females. The other countries had significantly more female respondents. The age breakdown was fairly consistent across the countries.

The employment classifications were similar across the countries as was employment status. The majority of respondents reported being black with the exception of the Bahamas where there were a significant number people who self-reported being Indians and mixed race.

The respondents in St. Lucia appear to have an overall level of education compared to the other countries followed by Barbados. Income levels also varied by country.

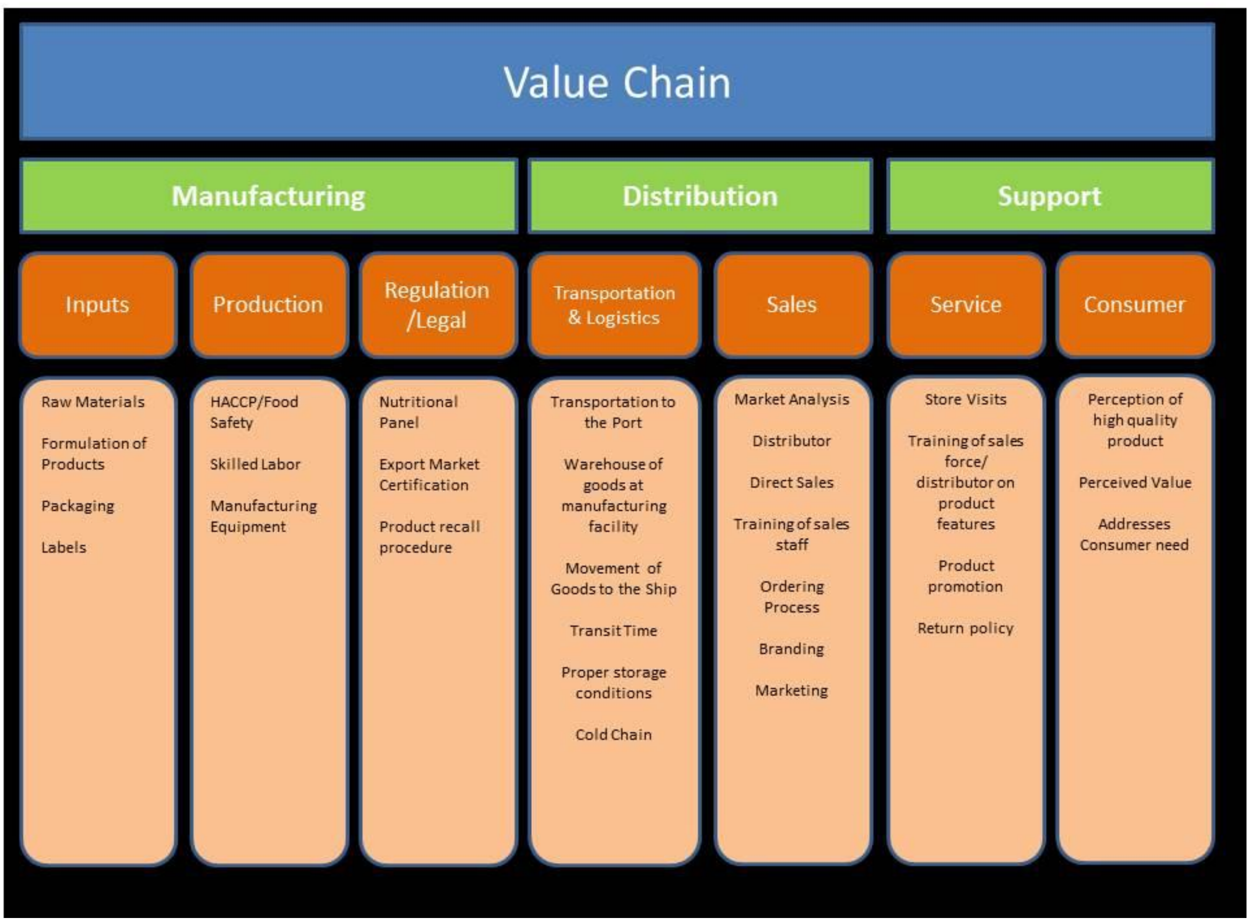
Demographics						
	Country					
Demographic Categories	St Lucia (A)	A&B (B)	Barbados (C)	T&T (D)	Bahamas (E)	Total

Gender						
Male	34.1%	32.2%	28.1%	50.5%	43.8%	38.3%
Female	65.9%	67.8%	71.9%	49.5%	56.2%	61.7%
Age Category						
1995- present	15.9%	8.1%	5.8%	16.5%	8.7%	11.2%
1985-1994	21.6%	36.0%	22.1%	28.2%	24.3%	26.4%
1975-1984	19.3%	26.7%	24.4%	17.5%	34.0%	24.5%
1965-1974	19.3%	10.5%	19.8%	19.4%	11.7%	16.1%
1955-1964	10.2%	14.0%	19.8%	11.7%	15.5%	14.2%
1945-1954	10.2%	3.5%	5.8%	4.9%	2.9%	5.4%
1935-1944	3.4%	1.2%	2.3%	1.9%	1.9%	2.1%
1900-1934	0.0%	0.0%	0.0%	0.0%	1.0%	0.2%
Employment Status						
Full time	64.8%	69.0%	65.9%	64.7%	71.2%	67.2%
Part time	8.0%	11.5%	4.5%	8.8%	4.8%	7.5%
Retired	9.1%	5.7%	6.8%	7.8%	8.7%	7.7%
Unemployed	9.1%	5.7%	6.8%	10.8%	7.7%	8.1%
Other	9.1%	8.0%	15.9%	7.8%	7.7%	9.6%
Race						
Asian	0.0%	0.0%	0.0%	1.0%	0.0%	0.2%
Black	79.5%	89.8%	91.0%	76.7%	43.3%	75.0%
Hispanic	3.4%	1.1%	0.0%	1.0%	1.0%	1.3%
Indian	1.1%	0.0%	1.1%	1.9%	26.9%	6.8%
Mixed	4.5%	5.7%	3.4%	7.8%	24.0%	9.5%
White	8.0%	3.4%	2.2%	3.9%	1.0%	3.6%
Other	3.4%	0.0%	2.2%	7.8%	3.8%	3.6%
Education						
Primary	5.9%	0.0%	5.6%	14.7%	8.7%	7.3%
Secondary	43.5%	15.5%	25.8%	33.3%	26.0%	28.9%
Tertiary	29.4%	53.6%	30.3%	31.4%	36.5%	36.0%
University	20.0%	31.0%	38.2%	20.6%	28.8%	27.6%

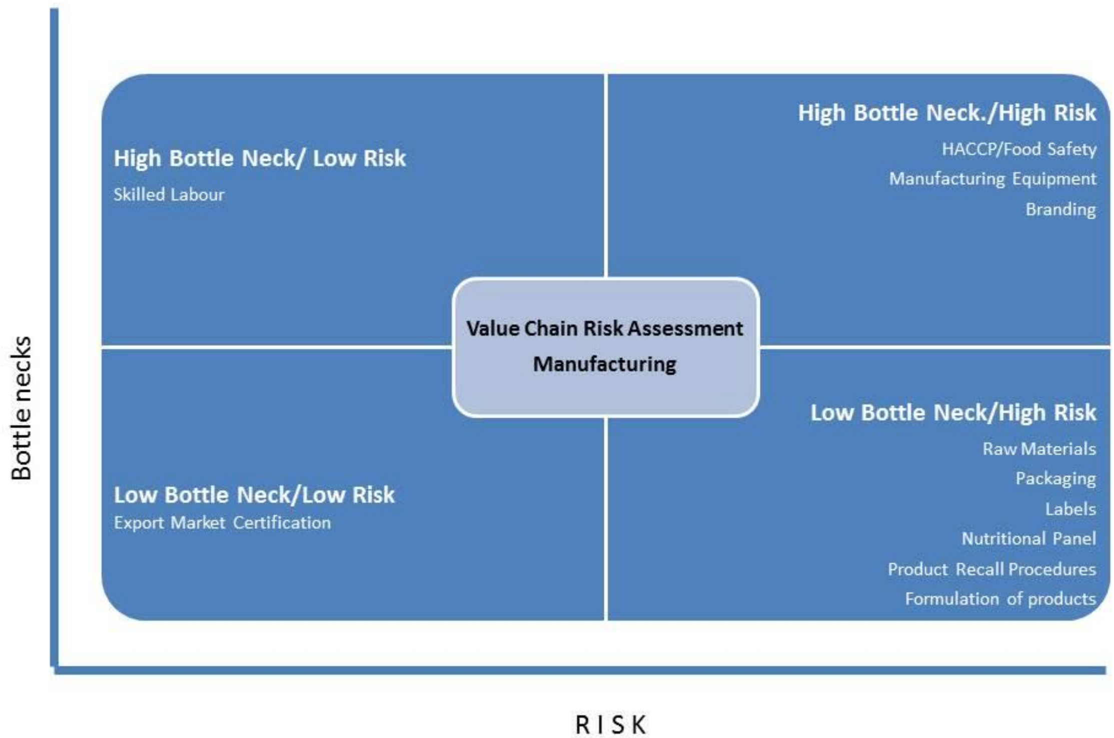
Income						
Less than $7,500	35.6%	17.9%	12.7%	42.7%	22.7%	26.5%
$7,500-$14,999	15.6%	12.5%	19.0%	36.5%	23.7%	23.3%
$15,000-$24,999	8.9%	33.9%	25.3%	5.2%	20.6%	18.2%
$25,000-$34,999	15.6%	10.7%	21.5%	9.4%	15.5%	14.5%
$35,000 or more	24.4%	25.0%	21.5%	6.3%	17.5%	17.4%

4. Value Chain Analysis

The value chain analysis was created by Michael Porter to discover inefficiency within the manufacturing process. The below process looks at the value chain for specialty food and the blockages that are due to regulations and inefficiencies within region and allows thought on how to diminish or reduce those blockages and stresses.



Looking at the components of the value chain a risk factor was assigned to each component on the hindrance to success for a business and strength of the blockage in the value chain. Is it easy to remove the blockage or very difficult. Then below each component is explained as what is the risk and or bottle neck.



Raw Materials – a number of materials required in the producing specialty food need to be imported. In some countries this could be vinegar, pectin and other ingredients that are essential to the production. Additionally the consistency and reliability of local and regional fresh vegetables and fruit are essential in growing the sector. When these cannot be secured other countries fill in the gap hurting the local economy.

Skilled Labor – it is difficult even with high unemployment to acquire quality labor and retain it in the market place. This is hindering growth and sustainability in for each firm. Government assistance training programs and incentives to hire new employees may be essential to growing the manufacturing base. In Trinidad for example, there is a demise of the manufacturing workforce because workers are moving to a government subsidized employment program where the pay rate and man hours per day requirement are more favorable than that of the manufacturing sector.

Packaging - producing products in equivalent or better packaging than International firms is still a struggle. The lack of quality packaging, even with an equivalent product, gives the perception of inferiority. This was supported from the survey results. Expense of procuring bottles and quality packaging is a hurdle.

Labels – ensuring design and proper printing of labels are consistent in convening the brand and quality of the product while meeting labeling standards in each country. There are issues throughout the region with ensuring the proper ink supply and consistency in the quality of printing between runs.

HACCP – not required for CARIFORUM market. Inadequate access to technical advice and training to improve food safety for EU and US markets. Good Manufacturing Practices recommended transitioning to HACCP as regional exports are developed and export plans move to other International markets.

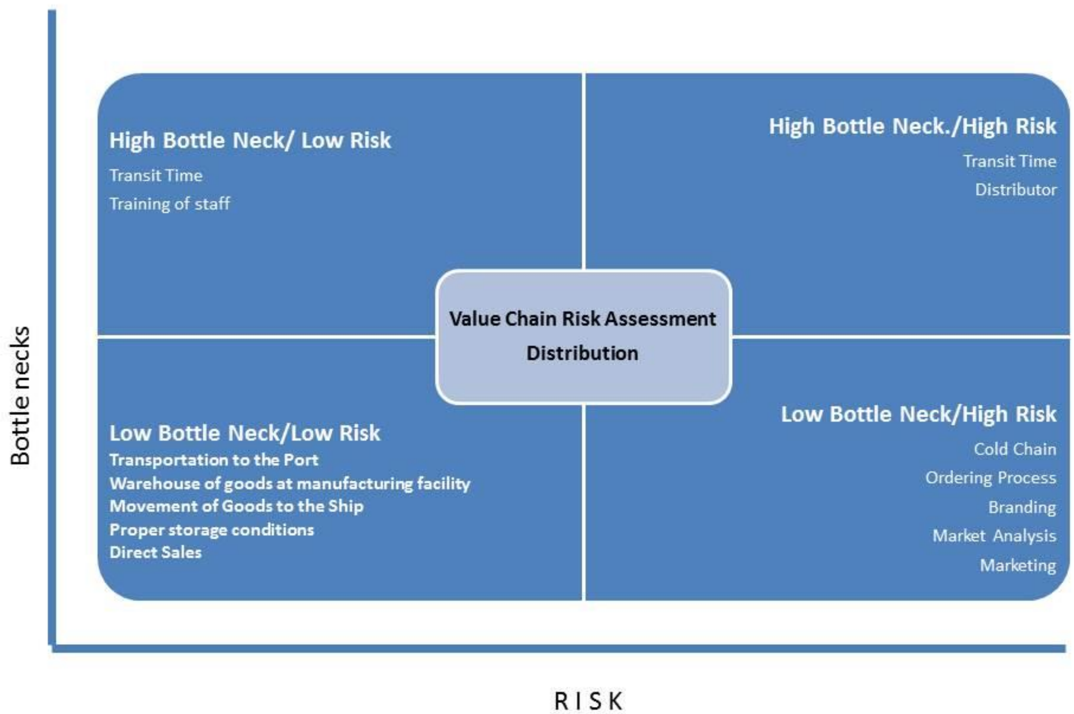
Skilled Labor – it is difficult even with high unemployment to acquire quality labor and retain it in the market place. This is hindering growth and sustainability in for each firm.

Manufacturing Equipment – emprises lack of access to capital to purchase of manufacturing equipment. Lack of knowledge on the creation of business/operational plans to improve the business and used to secure capital. One opportunity to assist a broad group of companies is a community kitchen that is HACCP certified and is self-sufficient. *(This is more fully discussed in the recommendations.)*

Nutritional Panel – Ensuring the nutritional panel, manufacturer date and expiration date are accurate and meet each countries regulation.

Export Market Certification – ensuring each product has been certified in the designated country to be sold

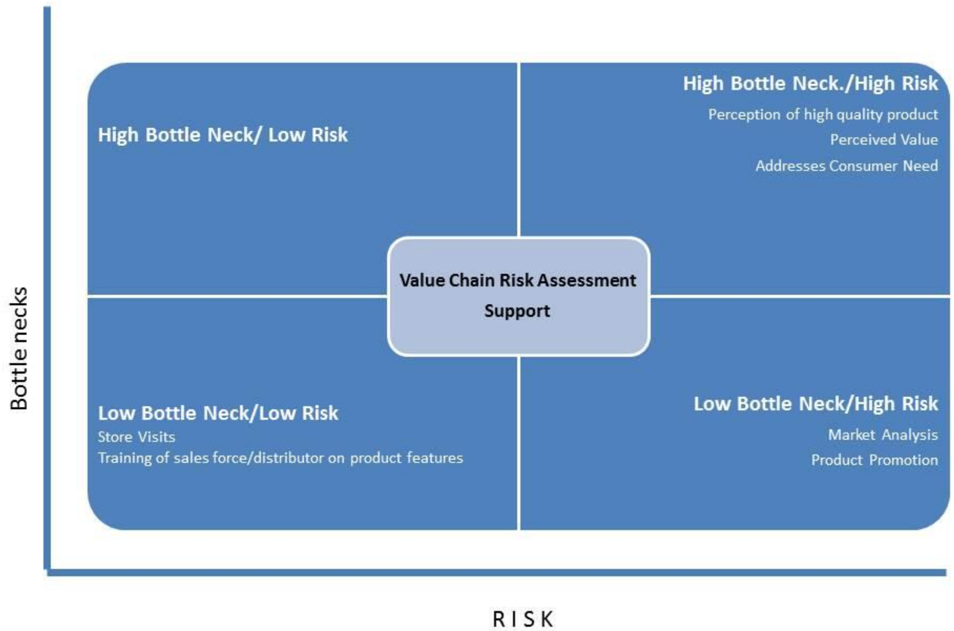
Product Recall Procedures – implementing international protocols that are consistent with the country the product is being sold for recalling products.



Movement of goods at port – depending on the country this can be a 1 to 2 day process or 5 to 10 day process. It takes dedicated staff to clear items through port.
Transit Time – can vary greatly from each of the five countries. (Refer to transit section)

Training of Sales Staff - bi-annual or quarterly training of distributor's sales staff to ensure familiarity and new uses of the product.

Marketing/Branding- ensure that each company has a function website, a consistent brand that is tied together with the product, label, packaging and price. It is also reflect in the manufacturing facility and customer service.



Product Promotion – ensuring a proper amount of funds are set aside to market the product launch, promotions, tastings, occasional slotting fees for gondola ends and other appropriately support. Absence of a dedicated service to assist Caribbean exporters with sales and distribution in CARIFORUM Fund and budget for product launch.

Trade Show – attend or participate and attend key food shows where buyers attend, i.e.: US, Argentina, Peru, Columbia, and International Food & Beverage Show to market products, but just as important to notice current trends or modifications to a product to increase sales. It does not always have to be about exhibiting but attending the working sessions can provide in-depth knowledge to grow the firm.

Market Analysis - limited access to specific information on the demand for specialty food products in Caribbean Markets.

Perception of High Quality Product, Perceived Value and Addresses Consumer Need – all tied back to the brand – consistent quality products that are represented in the packaging, labels and overall brand of the product.

5. Recommendations

5.1. Marketing

5.1.1. Caribbean Label with Supermarkets

Through the survey results and observing the products on the shelves consumers did not know they were Caribbean based products and could not readily differentiate those from the other countries in some instances.

In Antigua at Epicurean Town Center the United Kingdom has a section with their flag clearly seen on the pricing bars on the shelves. The United States products clearly have a US flag on the label. These draw customer to their products. In Barbados there was the presence of a national label – Bajan Made. It is clear from the research there is a demand for Caribbean based products, and customers cannot always determine country of origin. It is also evident based on the research that consumers will buy and want to buy local and regionally produced good. A unique identifiable label should be designed and provided to producers who are exporting. This design file can be distributed by soft copy or via a website. Caribbean Export is well positioned to develop this concept in collaboration with the National Business Support Organizations.

This suggested label would provide the recognition needed which promotes and supports a buy local/regional approach. It can include the attributes that individuals strongly identify with Caribbean based foods, freshness, taste, building a stronger economy, etc. as indicated in the survey results.

5.1.2. Country/Regional Taste of the Caribbean Products Event

This is a country or regional competition of prepared foods for retail consumption. It provides exposure to distributor, grocers, importers, restaurant owners, and resorts as a pool of 5 to 6 judges a month prior to the tasting event. The tasting event has each participant at an individual table to present their product. Invitees from a wider group of distributor, grocers, importers, restaurants, resorts and local media are invited to sample the provide feedback on the product and the potential for sales. At the end of the event winners are announced in a variety of categories. Also the comments from the judges are provided to each participant in a private report.

A similar program runs annually in the State of Georgia called the Flavor of Georgia. More information may be found at http://www.flavorofgeorgia.caes.uga.edu/

The objective is to bring buyers and sellers together to review and develop appropriate products that can be test marketed locally and exported regionally and internationally in the long run.

5.1.3. Regional Trade Shows/Business to Business Forums

Staging of Regional Trade Shows. One of the more successful ideas in recruiting distributors to a trade show is also adding two to four tickets for their clients. Not only does the client get to preview and influence decisions on new products, it allows for a deeper relationship with other potential buyers of specialty foods. In addition, as one of the conditions they will agree to one-on-one meetings with perspective suppliers at the show. This may result in a sale, but also market intelligence on how the product will be received in the targeted market.

5.1.4. Sector Specific Trade Shows

Regional producers are encouraged to participate at strategically aligned Trade Shows attended by Caribbean buyers as there is no trade show which currently features regionally produced goods. Examples of these are: AG Grocers: or shows in Argentina, US, Peru, Columbia, and The International Food & Beverage Shows. Inward buying missions to these shows are sometimes arranged by the show organizers and often buyers are incentivized with airline tickets and other perks to attend and agree to matching meetings.

5.1.5. Trade Representative Offices

Development of trade representatives to assist companies with:

- Creating market assessments and entry strategies
- Locating and pre-qualifying appropriate partners and customers
- Providing free market insight and guidance on local business practices
- Arranging in-country business appointments
- Providing regulatory guidance on entering the market

The trade representative will be highly knowledgeable and well-connected representatives to assist foreign companies looking to establish business or manufacturing operations in the CARICOM country. This may be a half-time position with an initial six month country with specific deliverables outline. These may be assisting so many companies, arranging meetings, providing marketing research to the sector and identifying companies for inward investment.

5.1.6. Development of Promotional Material

- Brochure and other promotional support material to include catalogues
- Website Development

5.2. Strategic Recommendations

5.2.1. Bonded Warehouse

Bonded duty free warehouses offer an opportunity for distributors to move more goods through a country as a logistical hub and to keep tax rates lower until the product is needed in the country's market. It can be burdensome to maintain adequate paperwork and a restricted section of a warehouse, where space is at a premium. It does lower the operating cost and can be useful for products that have a longer shelf life and may fluctuation due seasonal demand.

5.2.2. Community Kitchen Incubator

Establishment of a Community Kitchen which is a fully equipped commercial kitchen incubator to support small business in the production of high quality products at a reasonable cost. It provides services to those wishing to start or grow small businesses in the food industry, to local farmers who wish to add value to their products through processing, and to caterers and bakers needing a certified kitchen The Community Kitchen also has bottling and packaging equipment and is staffed with a knowledgeable individual to assist entrepreneurs start or move to the next level in the production of their specialty food products. The facility offers support in product development, guidance through the regulatory maze, advice on packaging and label design and offering courses to the specialty food cluster on these and other related topics.

The Community Kitchen uses a variety of pricing models that include hour usage fees, storage of ingredients, a percentage of sales, a yearly or lifetime membership. Additionally while staff is there to assist, members have the option of working alone and at any time. It is a 24 hour facility.

Through the economic analysis that Dr. Kent Wolfe recently conducted in Georgia, there are both private and public community kitchens that exist throughout the United States and Canada that are self-sufficient and are a strong building block within the specialty food cluster.

5.2.3. Tools for the Sector

- Pricing tools are available online to assist in determining export pricing. Menutools (www.menutools.com) is a smart food costing application that will intuitively guide manufacturers through food cost tracking and quantity measuring so they can manage better daily profit generation.

- Menu tools are used to determine a nutritional label from the specific breakdown of ingredients per item. Refer to http://www.onlinelabels.com/articles/creating-nutrition-facts-for-your-products.htm

5.2.4. Equipment Sourcing

- Bottles continue to be hindrances for growth throughout the CARIFORM. The free trade agreement with Costa Rica has increased dramatically the sales to the region. An example of the cost of a 5 oz. pepper sauce bottle with a cap and reducer is $.35 without shipping from Miami (https://www.sks-bottle.com/340c/fin18ab.html.). A bottle blow machine may be a more efficient use of resources with the machine costing $15,000 for a new machine and as low as $5,000 for a used machine to reducing the cost to $.25 per bottle. Refer to http://www.packaging-equipment-sales.com/Plastic-Bottle-Blow-Molding-Equipment.html

6. Technical Assistance Recommendations

6.10. Standards and Food Safety (HACCP and GMP)

Implementation of Good Manufacturing Practices so that products are produced safely. The ability to conduct product recalls and enable traceability of products in the market place is an essential component for conducting successful exports to any market.

6.11. Packaging Redesign & Upgrades

Implementation of a region wide package upgrade repositioning program which will assist manufacturers identified in the study group to upgrade, redesign and reposition products to be on par with the international completion. The inclusion of a regional identifiable mark is an important part of this component to ensure that companies comply with international labelling standards.

6.12. Product Development

Recruitment of key food scientists or partnering with a suitable organization to support product upgrades, new product development, testing and compliance to food manufacturing quality requirements.

6.13. Marketing Support

As highlighted in the value chain section of the report marketing, branding and positioning of each firm is critical to grow market share locally and regionally. Companies will need to create a workable/flexible strategic business/marketing plan that outlines the path to accomplish these objectives. Within these strategies methods will outline the brand of the company and how this is support through the creation of promotional material, website, labeling, price and packaging. These could be offered through consultancy services, seminars or a mix of both.

Once this is established market access services such as trade missions and trade fair promotion can be used to support the firm. Each step of these steps will need to support and direction or the development in individual separate program or in a suite of service offered to the company. This includes:

- Development of Business and Marketing Plans
- Development of Promotional Material
- Website development
- Market Access Support
- Trade Fair Participation

6.14. Training

6.14.1. Seminars

Develop training seminars in a variety of delivery methods in person, online and self-directed to provide the most accessible material to enterprises. The seminars should use case studies, workbooks, and dynamic facilitators and last a couple hours to a full-day depending on the topic. Some of the topics to be considered are: Pricing for exports

- Financing options/Access to capital
- Pricing and Costing
- Accounting principles and Break Even analysis
- Trade Show participation
- Management and Business
- Logistics and Transportation
- Capacity Building
- Market Analysis/Segmentation
- Legal and Regulatory
- Human Resource Development

6.14.2. **Capacity Building**

Provision of in-plant technical support to facilitate

- Equipment Sourcing
- Plant Design
- Production training
- Standards Implementation

6.14.3. **Mentoring**

The creation of a mentorship program to assist firm's grow their business. The mentorship program could be comprised of successful businesses in specialty food sector from distributors, resorts, and other manufacturers. This mentorship program after developing a plan of action could last only for a couple of hours to a full year.

7. Data Base Management

The development of a highly reliable, searchable and web-based application Caribbean Export can use to easily share/view Food & Beverage market data. It is anticipated that the data base submitted under this project will have an average shelf life of one (1) year and should be maintained and updated as such to reflect actual market conditions and data updates.

The application's front end will be extremely user friendly and support real time data visualization from multiple perspectives it will utilize the latest and greatest of Modern Cloud Architectures which will support subscription based access via Desktop, and mobile devices on any platform and finally be exportable to other easily malleable formats (i.e. Microsoft Excel).

Front End: Angular.js + Bootstrap
Backend: Azure Web Apps

8. Appendixes

- Consumer Analysis
- Data Base
- Import Duty Schedule