



**CONSULTING SERVICES FOR FEASIBILITY AND  
DESIGN OF IN-MARKET LIAISON SERVICE**

# **EXPORT READINESS ASSESSMENT AND SUPPLY CAPACITY REPORT**



**PRESENTED BY:**



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CONTACT INFORMATION	
Name	Taiana Mora Ramis
Organization	NEX, S.R.L.
Address	Miguel Angel Monclus 241, Santo Domingo, Dominican Republic
Telephone number	809 540 6186
	829 281 1630
E-mail	<a href="mailto:tmramis@nexconsulting.net">tmramis@nexconsulting.net</a>
Website	<a href="http://www.nex.com.do">www.nex.com.do</a>

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## EXECUTIVE SUMMARY

An Export Readiness and Supply Capacity study of the agro processing industry in selected CARIFORUM countries was undertaken in order to determine the characteristics of the specialty food producers. The purpose of this study was to guide the design of and facilitate the operationalisation of the most viable arrangement for providing Caribbean specialty food producers with access to in-market liaison services (e.g. freighting, warehousing, distribution, co-packing, in-market promotions, and market intelligence) in the US and EU markets

While it had been determined that an efficient in market liaison service would provide the key support needed by Caribbean exporters for market entry, the different capacities of the exporters in the region had to be ascertained for the process of finding the best solutions.

To this end visits were undertaken in Belize, the Dominican Republic, Jamaica, St. Lucia and Trinidad & Tobago, where the project Consultants visited the facilities of preselected firms. A preliminary workshop was held in each of the countries to provide information on the project and to begin the data gathering process. A regional workshop was also held in Jamaica towards the end of the Project to discuss with the companies and other stakeholders, the findings on this study as well as the proposed in-market solutions.

The study identified the group of companies- category A from the sample used who were export ready, and had the capacity to be the first users of the proposed in market services. Category B companies who needed some adjustments to become fully export ready were also identified and where possible, technical guidance provided on adjustments/ interventions needed generally to be export ready, or specifically to be ready for the US and the EU markets.

The findings point to a number of challenges facing the exporters which inhibit their penetration into the EU and US markets or growing their market share. These include the following:

- Changing food safety regulations and compliance with the requirements
- Packaging and changing labeling requirements for each market
- Cost of Intellectual property protection in each market
- Access to technical support for new product development

- Cost of marketing and promotions
- Limited access to market information that is current and accurate (market intelligence)
- Limited company resources including access to financing
- Cost efficient Logistics of getting products to market especially for less than container loads
- Limited knowledge of In market distribution solutions
- Developing appropriate cost structures. In addition to production costs additional inputs include: liability insurance for importers, food safety compliance certifications, trade mark registrations etc

The above listed constraints are being experienced by most SMES across the region, many of which are recurring issues and they still remain over the years. This means therefore that the specialty food export sector cannot have the level of growth that is possible until exporters are able to have these identified company and market issues addressed

While the Category A companies have indicated their readiness to access suitable in market services that will be proposed, the B companies must be assisted to move to A category in the shortest possible time to enable quick take up of in market solutions that are being developed.

Proposals to increase the export readiness of the firms in the region include:

- A coaching programme which would provide training and guidance on company and market issues both individually and collectively for groups of companies.
- A technical support programme to provide support in areas such as product development, labelling, packaging, implementation of food safety requirements and compliance
- System for access to market intelligence data

Further, to facilitate the realization of these proposals, the firms themselves agreed to the proposal for there to be a central coordination point in the region that would have responsibility for ensuring that the developmental interventions are undertaken and that the logistics for meeting market demands are put in place. The companies also felt strongly that a well coordinated “in market services” in the target markets could facilitate significant opportunities for export expansion into new and traditional markets. The concept for the in market services and a central regional coordination will be developed and elaborated on in the feasibility study and business plan for this project.

This report therefore provides detailed information on: - the methodology used for data collection and classification of companies; the assessment instrument that was developed; the findings of the Food Safety Experts from the USA and EU who visited companies, assessed the products and readiness of the companies; summary profiles of companies and their classification into A, B, C or D in terms of export readiness; and detailed analyses of the issues with recommendations.

## INTRODUCTION

The Caribbean Specialty Food sector, due to its unique flavours and formulations, has been identified as having untapped opportunities in various markets especially those in the US and EU. These markets however are very sophisticated and therefore demanding in areas such as presentation, packaging, quality and branding.

The majority of exporters of food and beverage in CARIFORUM are considered small to medium size and so their ability to: adapt the products to conform to the various market entry requirements; find new markets; respond to large orders, among other things are extremely challenging for them.

While it has been determined that an efficient in market liaison service would provide the key support needed by Caribbean exporters for market entry, the different capacities of the exporters in the region as well as the different market segments and geographical locations to be targeted have been taken into consideration in the process of finding the best solutions.

## PROJECT OUTLINE

The project's main objective is "to design and facilitate the operationalisation of the most viable arrangement for providing Caribbean specialty food producers with access to in-market liaison services (e.g. freighting, warehousing, distribution, co-packing, in-market promotions, and market intelligence) in the US and EU markets".

To be able to design viable market arrangements for Caribbean Specialty Food producers, it was necessary to determine the supply side characteristics.

In the outline of the activities, the TOR makes some critical assumptions:

- a) That there was a good size pool of SMEs in the Specialty Food sector in the Caribbean with the interest, capacity and potential to export to the US and EU. The project assumed at least 90 companies would be interested and ready in the selected 5 countries: Jamaica (30), Dominican Republic (30), Trinidad and Tobago (20), Belize (15) and St. Lucia (5). The project called for at least 90 to be classified and their market readiness to be determined.
- b) Out of that list of companies and products would come the identification of the in market services that would be developed. Their willingness to pay for services, etc.
- c) The activities as outlined in the TOR are:
  - Conduct visits to Jamaica, Trinidad, Belize, St. Lucia and the Dominican Republic. In each country, the Consultants will conduct a workshop to:
    - disseminate information about the proposed arrangement to provide in-market liaison to Caribbean specialty food producers; and the typical operations of providers of such support services including the range of services provided and the fees/prices charged by providers;
    - gain an understanding of the challenges and experiences of agro-processors in penetrating and growing their market share in the US and EU markets; their specific in-market support service needs; and their willingness and capacity to pay the typical fees/prices charged for in-market support services;



- Conduct visits to a minimum of 90<sup>1</sup> agro-processing enterprises in the countries listed at (a) above to collect the data on export readiness and supply capacity.
- Distribute the data collection instrument/s to selected enterprises in other countries where products described as “good bets” are produced and liaise with BSOs and producer associations to follow up with enterprises in order to obtain a high response rate.
- Utilizing the information compiled, prepare a draft Export Readiness and Supply Capacity Assessment Report.

## METHODOLOGY

The assessment of the export readiness and supply capability of firms was undertaken through the following steps:

- Engagement by Caribbean Export of main BSOs in the targeted countries: - Belize, Dominican Republic, St Lucia, Jamaica & Trinidad & Tobago
- Development of the Assessment instrument
- Promotion of the Project to targeted exporters/export ready firms and other BSOs & Invitation to the initial workshop in the above five countries
- Staging of the workshops
- Confirmation of company interest in participating in the Project and returning completed assessment questionnaire
- Visits made to production facility

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<sup>1</sup>It is expected that the Consultants will conduct visits to at least the following number of enterprises in the targeted countries: Jamaica (20), Trinidad and Tobago (20), Belize (15), St. Lucia (5) and the Dominican Republic (30).

- Assessment of information provided by companies on critical areas such as: product specification, packaging, food safety compliance, capacity
- Categorisation of firms into A, B, C, D based on set criteria
- Mailing campaign to companies in the other countries (Antigua and Barbuda, Barbados, Dominica, Grenada, Guyana, St. Kitts and Nevis, and Suriname)
- Social media paid campaign to those countries including Haiti and Bahamas.

For companies from other CARIFORUM Countries that were not visited but expressed interest in participating in the Project their completed assessment forms were evaluated.

## **Mobilization of BSOs**

Caribbean Export in June 2015 wrote to inform of the Project and to seek the support of BSOs in assisting with the invitation and selection of companies to participate in the “kick off” workshop and to provide a facility for that workshop to take place. The NEX representatives in the Caribbean worked with the BSOs in finalizing the target list of invitees and in mobilizing potential participants. The BSOs dispatched letters to outline the Project and to invite participation at the workshops. These initial workshops were therefore hosted by the BSOs and the programme included:

- Update on the Regional Specialty Food Sector Programme (BSO)
- Overview of Project (NEX Representative)
- Experience in the Specialty Foods markets. (Experienced Exporter)

- Discussions on company and market issues and constraints (Participants)
- Way forward for the project

**Table 1: Data on first workshops hosted by the BSOs**

Country	BSO	Number of Invitees	Number of Attendees	Date of Initial workshop
Belize	Beltraide	17	5	September 1
Dominican Republic	CEDA	32	18	July 23
Jamaica	JAMPRO	59	16	July 29
St Lucia	TEPA	14	12	Sept. 3
Trinidad & Tobago	ExportTT	20	4	August 27
<b>TOTAL</b>		<b>142</b>	<b>55</b>	

While the attendance at the workshops was below expectations, at all of the workshops there were very active discussions and various areas of concerns and frustrations of the companies in relation to company and market issues were aired. Details of these are provided later in this report in the section titled ***Main Constraints as indicated by Companies.***

Reasons for the poor turn-out at the workshops are elaborated in the section of this report which analyses targets against achievements. The contributing factors however include the following: rescheduling of workshop date due to holiday schedules of key personnel; reduced staff in companies due to summer holiday schedules; low interest in project; competing events (e.g. in Jamaica: Doing Business with Canada Workshop, ASYCUDA training; other marketing programmes in which the same companies are being targeted).

## The Market - Success Factors

This project is specifically directed to Specialty Food products and market. The definition of Specialty Food is mostly a US framed denomination, although EU market has similar characteristics in its gourmet/ethnic segment of the market. Because the TORs are based on the Specialty Food denomination, we have centered the work undertaken on the project and the assessment of the export readiness to include that segment according to the US definition. Below we establish the elements which define Specialty Food in the US. We also provide an outline of the areas of definition of EU where geographical indicators and other marks have a stronger meaning than in the US.

Specialty Food is a premium product which meets certain attributes such as authenticity, novelty, locally sourced, organic, non-gmo, ethnic, etc and targets specific types of consumers. The classification of products which are considered Specialty Food is not static and it can evolve according to the trend, sales channels and number of producers in the market. Products considered Specialty Foods have moved to mainstream market and then they stop being considered Specialty such as the case of certain Mexican food items and most recently Greek Yogurt.

Besides the attributes and characteristics indicated above, the key element in the definition is “premium”. A product needs to cater to a larger consumer base (beyond the Diaspora), and be in the premium category in terms of presentation, packaging and branding. While products targeting the Ethnic (Diaspora) segment target the nostalgia and needs to look like what is available “back home”, the Specialty Food product needs to reflect the attributes, have an effective branding or enough novelty/authenticity elements to appeal to the Specialty Food consumer. To illustrate the point, products like Busha Browne or Walkers Wood are part of this grouping that appeals to the Specialty Food Consumer. Many CARIFORUM products targeting the US market may not qualify as a Specialty Food because of presentation, packaging, branding and inability to transmit the indicated attribute to the consumers.

In the Specialty Food sector, you are either following trends or cultivating trends. It depends on the investment you do to introduce your products and your brand in the market. According to the US Specialty Food Association, “The specialty-foods consumer is an inveterate food lover with a spice for life”. A poll of core consumers found that they have a fancy for “a basket of jams and jellies, with meat products and crackers” as well as “beers and hot sauces from around the world.” The increase of foreign population in the US has contributed to the increase in consumption of these products. 74% indicated in 2014 that they purchased specialty food products. While New York and California continue to be the entrance point for almost 90% of the Specialty Food in the US, Pacific and Mid Atlantic states are in general where the greater growth is.

**What makes a Specialty Food Product?** The export readiness assessment also took into consideration a general assessment of the products characteristics against the main attributes which are part of the Specialty Food segment of the market.

Moreover, Specialty food is also defined by its consumer. A product may be in the same supermarket and have different target groups like products which are in the “ethnic” section of the isles in areas where Diaspora is strong and could also be in the product category isles where it targets the wider consumer. The Specialty Food publications identified 34 specialty food and beverage categories, with chocolate, specialty oils, cheese, coffee, salty snacks and frozen desserts heading the list. These categories also serve as “gateway products that draw people in and get them to try other product categories,” said Denise Purcell, editor of Specialty Food Media. Coffee, cocoa, snacks and nuts are the largest and fastest growing segment of the Specialty market in the US.

## Characteristics and Success Factors

Export readiness has different elements which we have analyzed in the design of the assessment instrument as well as the company visits and interviews. We looked at the elements of readiness for the export markets in general (company and production capacity, competence and commitment, etc) as well as readiness for the US and EU markets which relates to market knowledge and compliance as well as food safety preparation to be ready to address the ever demanding technical barriers to trade related to food safety regulation. However, to assist in the assessment criteria we have looked at a) key attributes most sought at in terms of products and how they could range with the competition in the market and b) key success factors of companies which have already entered the market. We have used this analysis in the US Specialty Food market as US market is the one most fitted for the Specialty Food definition.

## Attributes

In the chart below we have listed the main attributes generally used to classify a company in the Specialty Food segment. However other elements are also important as specific certification like organic, no GMO, gourmet, natural, gluten free, slow food, fair trade.

<b>CURRENT TRENDS AND SUCCESS FACTORS*</b>	
1. AUTHENTIC	
2. CRAFTED	
3. HEALTHY	
4. NATURAL	
5. ORGANIC	
6. RAW FOODS	
7. CORRECTIVE	
8. NEW PREPERATIONS	
9. SUSTAINABLE	
10. FAIR TRADED	
11. LOCAL	
12. CAUSE RELATED	
13. FRESH	
14. CORRECTLY SIZED	
15. EASY TO USE	
16. LABOR SAVING	
17. MINIMUM COOKING SKILLS	
18. FLAVORFUL	
19. ENDORSED	
20. NOSTALIGA BRANDS & PRODUCTS	
21. UPSCALE PRIVATE LABEL	
22. REPLACEMENT IMPORTS	
23. CONTINUED GLOBAL INFLUENCES	
24. ETHNIC	
25. MULTI ETHNIC CROSSOVERS - FUSIONS	
26. ESTABLISHED BRANDS	

## EU – The Gourmet Food Market

The European Union while segmenting the gourmet/premium market does not use the term Specialty. Characteristics such as authenticity, organic, fair trade and premium are part of the gourmet market segment. The EU importers and researchers include in this group the food ingredients which are used by other manufacturers and the food service industry.

The EU consumer is also highly sensitive to sustainability of products, low carbon emissions, recyclable packaging, etc.

Many of the “specialty food” from Europe sold in the US and the world as specialty/gourmet food such as cheese, beer, hams, etc are defined through protected geographical indicators. Some of the EU food qualifies as “specialty” thanks to one of the EU geographical indicators which highlight the traditional method of elaboration, another element of interest for the EU consumer.



- **Protected Designation of Origin - PDO:** covers agricultural products and foodstuffs which are produced, processed and prepared in a given geographical area using recognized know-how.
- **Protected Geographical Indication - PGI:** covers agricultural products and foodstuffs closely linked to the geographical area. At least one of the stages of production, processing or preparation takes place in the area.
- **Traditional Specialty Guaranteed - TSG:** highlights traditional character, either in the composition or means of production

Source: EU Food and Drink.

## The Assessment Tool

The assessment of the export readiness and supply capacity of Caribbean specialty food producers was a main pillar of this project. The Assessment tool was developed by the NEX team. It was necessary to develop this questionnaire after evaluation of the various export readiness tools that have been used by various organizations regionally and internationally were seen to be inadequate in collecting the detailed information needed.



The assessment tool gathered information in the following main areas:

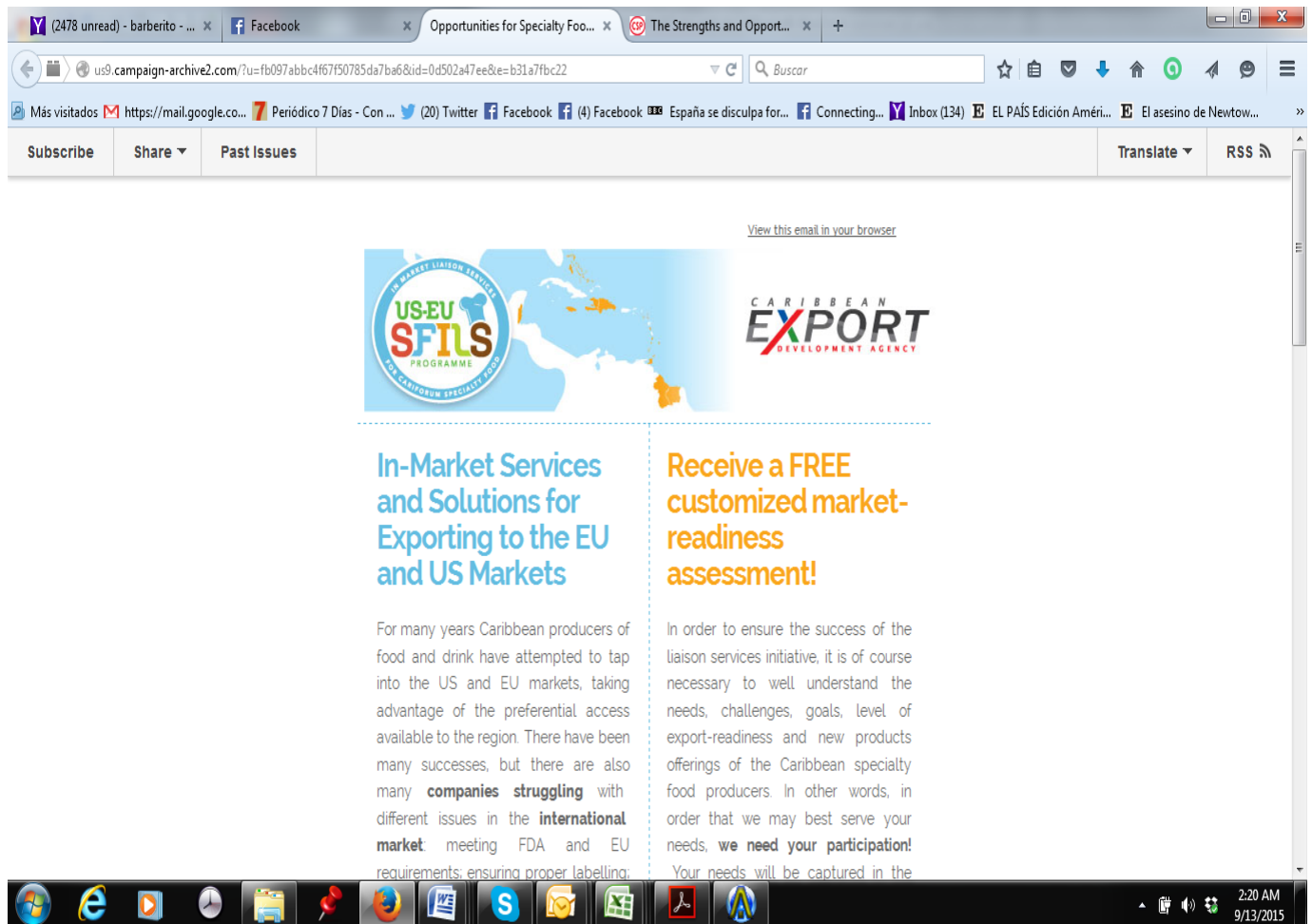
- Company information
- Product specification
- Commitment to export and skills
- Quality control systems
- Food safety systems
- Production capacity
- Marketing objectives/planning
- Export experience
- Ability to modify product/ packaging to suit market
- Financial resources for marketing support
- Willingness/ ability to cost share
- Projections and Plans

See ANNEX I: The Assessment Tool.

The assessment instrument was widely distributed in the targeted 5 countries (Belize, Dominican Republic, Jamaica, St Lucia, Trinidad & Tobago) and directly to firms/ organisations in the other CARIFORUM countries. The firms that received the assessment instrument were those deemed by the BSOs in the countries, in collaboration with the NEX representative, as the potential groups of companies from which those qualifying to benefit from this Project would emerge. The response however, as measured by the return rate, was much lower than expected. The return rate from the 5 targeted countries was 29% even after several follow up telephone calls and email messages.

**See Table 3: Outreach to Companies and Response by Country**

In an attempt to reach other specialty food producers in CARIFORUM the SFILLS Project was also promoted via social media. Below is image of the page.



The NEX representatives in the Caribbean visited the facilities of the firms (from the 5 countries) who had registered and confirmed their interest by completing the assessment forms.

The Food Safety Specialist from the USA reviewed the information given on the forms and provided individual feedback on areas such as: requirements & conformance to certain regulations; preparations needed to be in place for the new FSMA law which will be enforced come 2016. The focus here was on product information, packaging, labelling, food facility registration, export product characteristics etc.).

The Food Safety Specialist from Europe visited the facilities of participating companies to look at their processes, HACCP plans, their product labels etc and to advise on requirements and compliance with food safety and other market requirements for the EU.

The information collected from the completed forms and also from the visits was analysed to determine, among other things, the classification of each company in terms of export readiness and capacity to export to the US and EU markets.

See ANNEX II: Company Summary Data from Assessment Tool.

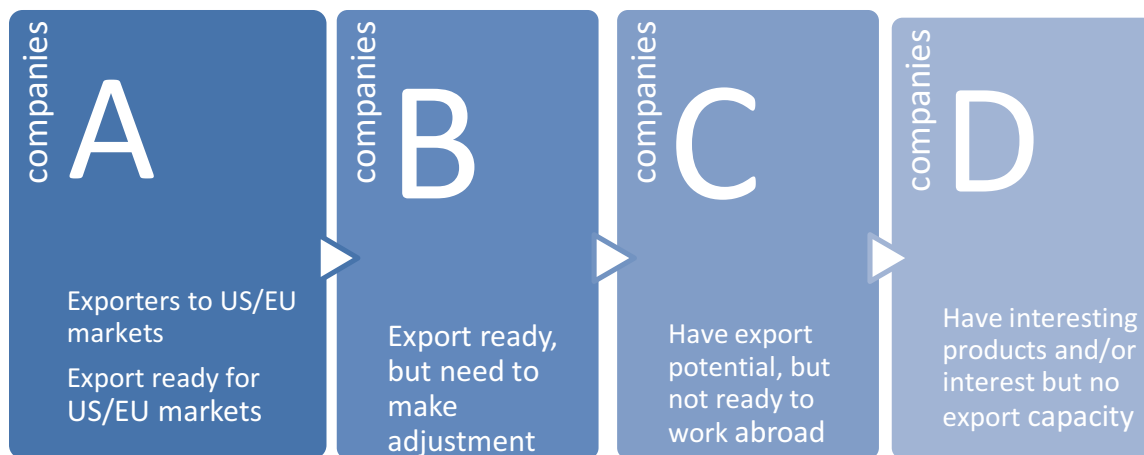
## **Rating of the Firms**

Four grades for rating firms have been used as indicated in the chart below. Data collected from the assessment forms as well as from the visits, have been used to guide the selection of grade A exporters who are deemed to be the ones most ready to use the in market liaison facility to penetrate the US and/or identified EU markets, as well as Grade B exporters who would need a few interventions/ adjustments to be considered market ready and have the resources (or access to) address these. These adjustments can be in areas such as: market compliance and product development. This Category B also includes those that are exporting in small quantities now; those that have exported in the past faced some challenges and have now overcome these and are now in a position to resume exporting.

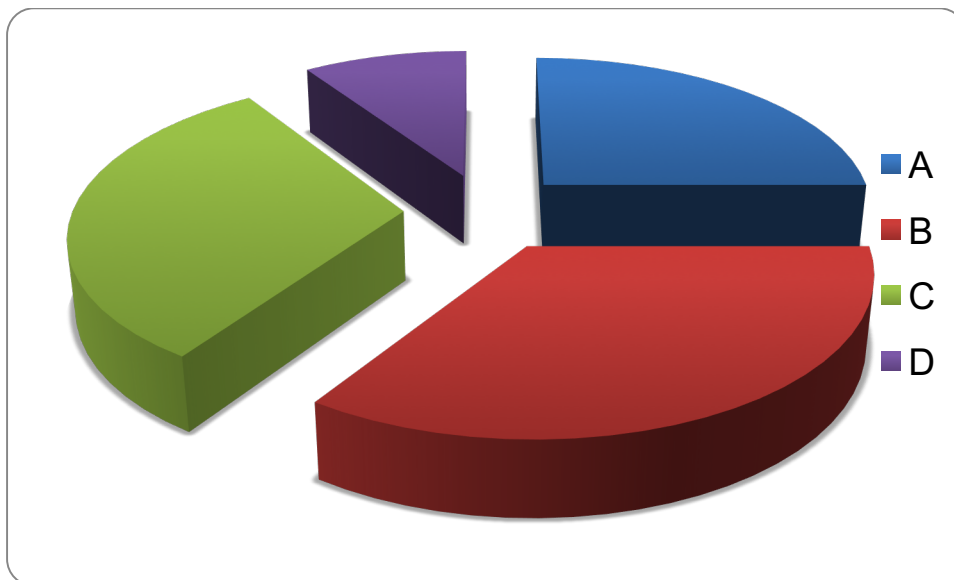
Category C are companies that have products with strong potential in the Specialty Foods market but require further development and company readiness.

Category D will include all the rest that do not meet the above criteria, but have filled the assessment tool, attended the workshops and have strong interest in exporting.

As indicated in the TOR, women owned firms will be given special consideration once they meet the stated requirements.



Company Distribution by Categories:



25% of the firms assessed were placed in Category A.

35% in Category B, 31% in Category C and 9% in Category D.

**TABLE 2: Gender Distribution in the Participating Firms**

Years in Business	No. of Firms	No. Male employees	No. Female employees	Female owned business
0-9	8	83	68	1
10 - 19	11	90	123	3
20-29	3	54	67	
30 and over	9	402	343	1
<b>Total</b>	<b>31</b>	<b>629</b>	<b>601</b>	<b>5</b>

Data obtained from the Forms of 31 firms indicate that there is a total among them of six hundred and twenty-nine (629) male employees and six hundred and one (601) female employees working in their companies. Of note also is the fact that five of these companies are owned and managed by females. These are **Marie Sharpe** and **Hot Mammams in Belize** and **Home Choice** and **Southern Processors** and **A Taste of the Caribbean in Jamaica**. The TOR specifically makes reference to women owned and managed businesses and the support that is needed to transition them to Category A exporters, if classified differently.

Of these four companies, **Southside Distributors** is the youngest company being in operation for 9 years and started exporting 7 years ago employing up to 54 persons during peak production periods. The company, which is located in rural Jamaica, is managed by owner Denese Palmer who is extremely focused on where she wants to take her business and so her plans and actions are directed by her strategic vision for the company. The products targeting the specialty food market are: jerk seasoning, sauces and solomon gundy. Other products such as canned ackee, breadfruit slices and callaloo are exported to ethnic markets. Miss Palmer is the 2015 recipient of Caribbean Export's Female Exporter of the Year. See ANNEX IV for Profile of Southside Distributors.

**Home Choice Ltd** was established 16 years ago and began exporting 4 years ago. The Managing Director- Kareema Muncie is passionate about her operation which has been growing. She employs up to 15 persons during production periods and also has other companies copak for her. The products targeting the specialty market are the solomon

gundy, jerk seasoning and pepper shrimps. She developed a new ginger based product and is anxious to increase sales in the export markets. Export sales represent about 10% of their revenue and the company is now focusing on putting a HACCP system in place. See ANNEX IV for Profile of Home Choice.

**Hot Mamma's** has been in business for 11 years and exports started 8 years ago. The owner and manager Wilana OldeHam is concerned that there is business opportunity that she cannot take full advantage of because of the logistics of getting small orders to market. There is need for consolidated shipments from Belize or warehousing in the marketplace for easy dispatch to customers. Her company exports a variety of hot and sweet sauces and pepper jelly to the US but is not exporting to Europe.

Marie Sharpe, the owner of **Marie Sharp's Fine Foods Limited**, has been in the business for 34 years and began exporting 28 years ago. They export in container loads and their products are in many countries worldwide. They export directly to nineteen countries with Japan being their biggest market. They are currently upgrading the physical plant to improve the process flow which will result in significantly increasing their output: The company produces: habanero pepper sauces, tropical jams and jellies, seasonings and fruit squashes. Their export sales represent about 44 % of total revenue.

See ANNEX IV: Marie Sharpe's Fine Foods Ltd.

Sonya Dunstan, the owner and manager of **A Taste of the Caribbean** has been in business for 10 years. She uses all local fruits herbs and spices to make products, -jams, sauces and condiments. Her brand- Dunson's is very visible in tourists and airport shops, Exports to the UK, Canada and Caribbean. Needs more work in HACCP preparation.

**Pachamama and Proagro**, a company out of the Dominican Republic is jointly owned and operated by a wife and husband team This company can therefore be considered as also having a woman in the forefront of their activities.

Table 3 below summarizes the level of outreach to companies in the 5 targeted countries and the level of response. It tracks the joint effort of the BSO and NEX representatives in informing about the project and in getting interested firms to participate and become the first clients to benefit from the outcomes.

The following overall statistics obtained from the table below show the level of attrition at the various stages and in particular the response to the requirement for completing the assessment instrument. The requirement to complete the form had a negative effect on the number of participants in the project. It did not however deter from those who recognize the positive impact that the outcomes of this project could have on their export thrust and that the provision of data is necessary to provide desired results.

The analysis of the company response to the project it is observed that:

35 %of those invited attended the workshop

35.7% of those informed on the project indicated interest in project

30.8% of those who received questionnaires completed and returned them

57% of those who maintained interest remained with the project

**Table 3: Outreach to Companies and Response by Country**

Country	Companies/ Organisations Invited to Initial workshop or introduced to SFILLS after workshop	Attended Initial Workshop	Received Assessment Questionnaire	Interest after Follow up by NEX/BSO	Returned Assessment Questionnaire	Visit made to Facility	Visit made by Food Safety Specialist
Belize	17	5	13	7	6	6	0
Dominican Republic	47	18	25	16	7	6	3
Jamaica	59	16	32	9	7	8	2
St Lucia	14	12	14	9	3	2	0
Trinidad & Tobago	20	4	15	12	6	8	4
<b>TOTAL</b>	<b>157</b>	<b>55</b>	<b>99</b>	<b>53</b>	<b>29</b>	<b>30</b>	<b>9</b>
Others	50 + 14,000*		5	6	3	0	
			<b>104</b>	<b>56</b>	<b>32</b>	<b>30</b>	

50 preselected and reached through direct mailing campaign and 14,000 reached through Face book specially targeted campaign for business and food industry in the other CARIFORUM countries.

Other countries with filled questionnaires are: Suriname (2), Grenada (1)

See ANNEX III: Detailed Company Response by Country.

## CARIFORUM FIRMS EXPORT READINESS FOR THE US SPECIALTY MARKET

### EXPORT READINESS FOR THE US MARKET

The assessment form sought to capture specific information on the products targeted for the USA to determine their suitability, conformance with health and safety requirements, packaging and processes, among other technical areas relating to product characteristics. It also captured specific information on company readiness for that market. This includes HACCP plan, GMPs, preparation for FSMA regulations. The assessment by the Health Authority and FDA Auditor, using the data provided on the assessment forms, and the recommendations provided to the individual participating firm is of significant value to them.

**Table 4: Export Readiness of Companies already exporting to the USA**

Years in Business	No. of Exporters	HACCP System in Place	IP Registrati on in USA
9 and less	3	3	
10-19	4	4	
20-29	3	3	
30 and over	7	6	6
<b>Total</b>	<b>17</b>	<b>16</b>	



After reviewing the information provided on the Assessment forms, a US Regulatory Compliance Briefing was prepared for each company by Mr. Gabriel Pascual, (US Food Safety Expert) who is a US Health Authority and FDA auditor and is also a part of the NEX team on this project. The objective of this evaluation and diagnosis is to assess the level of knowledge of and compliance with current applicable phytosanitary norms imposed by the United States Health authorities as it applies to the importation of specialty foods into the US market.

His comments in general point to the level of preparedness for the FSMA regulations which come into effect in 2016. His observation from the information provided by the companies, is “of those currently active exporters it is evident that there is wide spread deficiency in their knowledge or understanding of the current and newly implemented health standards that regulate food imports into the US”. Below are samples of comments made on individual assessments which are also applicable to several of the companies:

- *They must be prepared and review their compliance with FSMA, particularly by implementing a HACCP plan and complying with the new 21CFR 117 code for GMPs, This will be a requirement for exporters to comply by the end of 2016*
- *They should have their labels for the US market reviewed and perform corrections or confirm compliance prior to continuing exporting in order to avoid recalls or withdrawing product from markets.*
- *From the information in the questionnaire, this company appears not to be aware of the aspects that the new FSMA regulation entails and such is the main challenge for this company in order to continue to expand its sales in North America. Fast implementation and updating their current compliance of the law will facilitate expansion and increasing their current exports to the US.*

- *Although their products are not heavily regulated by the US Health authorities, they must be prepared and review their compliance with FSMA, particularly by implementing a HACCP plan and complying with the new 21CFR 117 code for GMPs*
- *This company manufactures frozen fruit pulp which is not heavily regulated by the US health authorities. Certificates of analysis must be in place with every exportation and all labels must be in full compliance of the established regulations. It is important to consider that all fruit products that have been processed should have been processed by a thermal process (i.e.: pasteurization) in order to provide guarantees to the authorities of the safety of the final product regardless of being stored at <10 degrees Centigrade*
- *All FSMA aspects are not marked as in compliance thus this company is in a very early stage of Health Norms' compliance which can be a risk and a threat if they continue exporting.*
- *It is our impression that the form was filled rather quickly and fails to reflect information regarding characteristics of their products, particularly those that are considered low acid and thus the most common to be scrutinized by the US health authorities both at entry and in the market. Label review for all their products is highly recommended.*
- *Very unprepared for export to the US even though regulatory requirements for this type of product is low and attainable without the need of lengthy and costly certification processes such as for milk and low acid products. Based on the aforementioned, this company is in need of solid training and regulatory finding for their specific market within the US since each state has slightly different regulations for importing ice cream and ice dessert into their markets*

- *All FSMA aspects (particularly HACCP plans) are not in place at this company which will also be required for exporting to the US, as well as having their labels reviewed to comply as necessary.*
- *Coconut cream and sauces are low acid and acidified products respectively. Although for acidified products there are no major restrictions, it is important to confirm that there is a Filed Process for the coconut cream and that the acid products have been confirmed by an authorized process authority and letter have been issued to be presented at customs at the entry moment of each importation in the US. As for coffee and other spices (including all other products as well) labeling must be confirmed that is in full compliance of the current regulations.*
- *A company without any experience in exporting to the US and with limited knowledge or information of the potential target markets and logistic aspects. Additionally, their knowledge of the health regulations, aspects of compliance and the cost or resources that this entails is apparently nonexistent*

The above comments reflect the level of unpreparedness and the actions that the exporters must take in order to be compliant with the regulations to enable them to continue exporting to the USA or to begin exporting, for the newer firms, come 2016. Most of the companies who have signed on to this project and are presently exporting to the USA need to act on the advice provided in order to continue to export to the USA or to expand business in that market. The Expert was however able to find 3 companies that had indicated significant advancement in preparing for FSMA regulations. Subsequently 4 of the other companies who joined the project later indicated that they too had started to prepare for FSMA, so a mere 21% of the firms had started some preparations for FSMA.

The US Food Safety Expert was however pleased that one of the 3 mentioned above had provided all the required information on the assessment form to enable him to provide the following positive assessment:

*“An experienced exporter with ample knowledge of the regulatory environment for their products. They count with the required registrations for their products. Although they claim that all FSMA aspects are under control, such must be validated once the norm is published by the FDA to ratify that their compliance is in effect. From their catalogue, it is evident that their experience in exporting and on customer relations is extensive and strong respectively”.*

Regarding capacity of companies to supply products to the markets in the USA, the analysis of market demand or opportunities in certain niches, will assist in determining the companies which have the capacity to meet that particular demand and which should be targeted to supply the products to meet the identified demand. The listing of category A companies and Category B companies however already identifies those with capacity to expand exports into the US to meet increased demand for their products.

Of the total number of companies on this project 53% are presently exporting to the US. It is interesting to note that the companies which indicate 2014 export sales to this market of between US\$600,000 and over US\$1.5million all have IP protection in the US. They all have been in business for over 30 years. These companies recognize the value of this protection in order to grow their brand in the market. Most of the Category A and Category B companies have indicated increased potential revenue with their existing infrastructure of between US\$0.4mil to over US\$1mil should additional export opportunities arise.

See Annex V: Report – Us Regulatory Compliance Review for Reported and Completed Export Readiness Questionnaires.

## EXPORT READINESS FOR THE EU MARKETS

The assessment form also captured specific information on the products targeted for export to determine their suitability, conformance with health and safety requirements, packaging, labeling, processes, among other technical areas. It also captured specific information on company readiness for that market, the HACCP plan that is in place, the knowledge of the legal requirements pertaining to declaration of allergens, use of GMO ingredients etc. The assessment by the Food Safety Specialist out of Europe and the

recommendations provided to the individual participating firm is of significant value to them.

**Table5: Export Readiness of Companies already exporting to EU**

<b>Years in Business</b>	<b>No. of Exporters</b>	<b>HACCP System in Place</b>	<b>GMP Certified</b>	<b>IP Registration in EU</b>
9 and less	1	1	2	1
10-19	3	1	1	2
20-29	3	2	1	0
30 and over	4	5	4	2
<b>Total</b>	<b>11</b>	<b>9</b>	<b>8</b>	<b>5</b>

Comments from the Food Safety Specialist after visiting the facilities of a number of the firms indicated that in general there is a lack of HACCP Plan. The Specialist reviewed the labels, the manufacturing processes and provided critical analyses for the companies. Information provided include methods for detecting certain fungi such as Mycotoxin. He explained the types of contaminations that manufacturers have to look for in their processing eg Allergens and Salmonella and pointed out areas of high risk for microbial contamination He advised of improper labeling where unsubstantiated health claims that are on labels have to be removed.

He also advised where ingredients have to be registered, where products are not suitable for export unless the process involves pasteurization.

Guidance in managing traceability of pesticides in raw material was provided to the manufacturer of herbal teas.

The Specialist identified various reference documents that he would source and supply to the manufacturers. These include:

- EU labelling requirements
- Info / ISO norm for Salmonella
- Codex Alimentarius info for specific products
- Checklist for HACCP plan
- Allergens and Codex Alimentarius
- Easy method for Mycotoxin detection

He was however impressed with the operations and the facilities of some of the established exporters that he visited where he saw HACCP systems in place and evidence of compliance with many requirements for exporting and in particular to the EU.

In addition to assessing companies, his schedule included a meeting with a quality consultant in Jamaica who is working with a number of agro processing firms including two that are on this Project. That representative is assisting the companies with HACCP and GMP implementation. From the discussions on food safety and hygiene the NEX Food Safety Specialist identified some gaps in knowledge and promised to supply the quality consultant with documentation on “Health Claim Issues in the EU”.

The assessments of the products and companies by the food safety experts proved very beneficial to the companies and assisted in the determination of the categories in which the companies should be placed.

The capacity of companies to supply products to the markets in the EU varies from a few pallets per week to container loads per week. The analysis of market demand or opportunities in certain niches, will further guide the selection of those preselected companies which have the capacity to meet that particular demand and which should be targeted to supply the products to meet that identified demand. The listing of category A companies and Category B companies already pre selects those with capacity to expand exports into Europe to meet increased demand for the products.

Of the thirty two (32) companies on this project 34% are presently exporting to the EU. Fifty nine percent (59%) of those companies who are exporting to the US are also exporting to markets in the EU. The data also show that 64% of those exporting to the EU are well established firms having over 24 years in existence. These are the firms with annual sales to the EU of between US\$ 300,000 and US \$1mil. The remaining companies export in smaller quantities and their individual annual export to Europe is in the region of US\$300,000 or less.

This data clearly indicate that the exporters who have been shipping in larger quantities into the EU are those exporters who would have some knowledge and experience in developing an export market for their products. These firms recognize the tremendous opportunities that exist and are now interested in finding a “hub” from which their products can be distributed to wider markets in Europe.

Approximately 45% of the companies exporting to Europe have IP protection in Europe and again these are primarily the older firms with the larger volume of exports. They recognize the importance of having this protection as they are aware of the negative impact this lack of protection has had on some Caribbean companies and their brands.

The Category A and Category B companies are operating their production line on one shift and several still have excess capacity in their plants, there is significant increased production capacity using existing infrastructure for some companies and even a second shift would be feasible for many. There is also a significant level of co-packing among processors in Jamaica for example, and this also enables the firms to manage their ability to respond to increased demand.

See Annex VI: Report- Assessments for Exporting to the EU.

## MAIN CONSTRAINTS AS INDICATED BY COMPANIES

During the initial workshops held in Belize, Dominican Republic, Jamaica, St Lucia and Trinidad & Tobago, the participants identified several issues which they see as being constraints to exporting. Through the workshops, interviews and documentation on the assessment form, the issues which were indicated were classified into two main areas namely: - Company Issues and Market Issues.

### COMPANY CONSTRAINTS

- *Compliance issues*

Compliance with the various food safety requirements, good manufacturing practices (GMP), labeling, packaging etc is quite challenging. The costs associated with getting the certificate of verification that a HACCP system is in place for example can be about US\$30,000. While local or regional consultants can be used to undertake the gap analyses, can assist with the documentation for the critical control points, and ensure that the company is HACCP ready, companies advise that the HACCP verification certificate is only acceptable if issued by a recognized organization in the target export market. While the selection of the verifying organization from the country is not a legal requirement of that country, exporters say that this has been the practice.

Compliance with the new FSMA regulations of the USA which will come on stream in 2016 could be a problem as many producers especially the smaller ones do not

understand the compliance requirements and have not begun to undertake any preparation. The roles of the national standards bureaux in compliance matters appear to be limited to primarily advising and monitoring, GMP compliance certification and basic ISO certification.

Another issue regarding compliance is the high cost of product testing and certification in the home market. In certain countries there is no authority, in others (like Trinidad & Tobago) there is only one lab with the capacity to do it, but cost per product is considered high by the SMEs. Costs in the destination markets are also very high. In addition, the issue of the reliability of the information and the period of validity of the information, to avoid creating the expense of the companies having to get new packaging and labeling in a short period of time .

Some companies also expressed the need for capacity strengthening in quality control matters and to have readily accessible and in user friendly format detailed information on standards and compliance matters by product category and by export markets.

New and potential exporters need clearly documented procedures in order to comply with the requirements to get products out into the markets

- *Limitations on raw material and inputs*

Many producers rely on locally sourced raw materials i.e. sources of fruits, vegetable and spices. In order to guarantee their supplies, the larger companies have established contractual and other relationships with farmers and these arrangements work very well providing on-going supplies. The manufactures in countries of the region where there are periods of very low or no rainfall, experience significant decline in availability of these inputs, so they have to seek imported sources and this is often sourced at significantly higher prices than the local inputs. On the other hand during periods of overproduction or glut, i.e. when supplies of raw material exceed



the production requirements, many producers store the raw materials thus incurring significant electricity costs to do so.

In Jamaica for example some producers try to mitigate this increased electricity costs for storage by using the facilities of a commercial cold storage facility

- *Packaging and labeling*

Companies expressed concerns about the costs associated with conforming to the different requirements for labeling by each market.

The smaller exporters are experiencing difficulties in sourcing appropriate containers (bottles, jars) and other material such as wrappers suitable for chocolate bars. Based on the levels of production and cash flow situation they are unable to purchase in the quantities to benefit from economies of scale. Some indicate that they presently buy from distributors in Latin America and would wish to go directly to the source.

- *New Product development*

The need for new technology with associated equipment and technical support is an inhibiting factor for manufacturers to be innovative and creative in developing new products, some product examples given include ready meals and medicinal extracts

- *Developing effective cost structures*

Some exporters identified the need for assistance in developing effective cost structures for their export items. With the introduction of a number of requirements coming from the market place, these all contribute to additional expenses and must be included in pricing the products for export. In addition to production costs, additional inputs include: liability insurance, food safety compliance registrations, trade mark registration etc.

Some companies deliver small on-line orders through the postal service and have challenges arriving at price quotations due to variable costs for the different markets.

- *Financing*

There is the view that there is not adequate financing for expansion. Access to grant funding is poor and loans are difficult to service.

- *Limited resources*

For smaller firms with limited management capacity or no export department (which is the situation in most cases) they do not have the resources in house to dedicate to the different tasks needed for quality assurance, compliance, marketing etc. Outsourcing those services to assist then with the proper preparation for export is also an expensive option. Survival in the local market that takes up most of their time and exporting efforts are mostly targeted to CARICOM or other Caribbean territories.

## MARKET ISSUES

- *Liability Insurance*

Importers require liability insurance and this has to be covered for each importer in the US and in Europe. Insurance coverage must include workmen compensation. Some regional companies have this coverage through an appropriate insurance company based in their home territory so that if a claim has to be settled it could be done in home country. Here again companies expressed concern about the prohibitive costs.

- *Intellectual Property*

A requirement for protection of brands is the registration of trade marks in the various markets. There have been several cases of Caribbean brands/names being registered in overseas markets and the true original owners of these brands only become aware when their products cannot enter those markets. The exporter then has the added problem of rebranding their products along with the associated expenses and loss of revenue from lost sales.

The CARIFORUM countries covered by this project are not members of the Madrid Protocol, which allows the exporter to register in one location and get protection in many countries. Companies therefore indicate that it is an expensive activity for registration in all the export countries of interest. Some, especially those not currently exporting understand the need to register, but want the investment to be worthwhile after they enter the market. There are others however, who continue to export without this protection even though they may be aware of cases where brands have been registered by other parties in the market thus retarding export potential as the producer has to undertake rebranding activities.

The online single registration fee is approximately 500 Euros for each market in Europe and over US \$500 for the USA. The overall cost can be higher as these approximate costs do not include any legal fees.

- *Logistics*

More information is needed on how best to get break bulk Shipments to market. It is costly to ship one or two pallets and makes the price of the goods less competitive.

SMEs suggested that the larger companies could assist smaller businesses in consolidation, shipping/distribution etc. While some levels of consolidation of shipments among exporters exist, this is an area that the smaller companies feel needs to be further developed as exporters can collaborate better.

- *Marketing & Promotions*

While companies recognize the benefits of exhibiting at trade shows, there is a feeling that it can be very frustrating and they feel that further direct B to B meetings could be more effective for promoting their products.

They feel that the promotional activities of the region need to include more non-traditional markets or niches within the traditional markets.

Many manufacturers do not fully understand the distribution system in the major markets to get their products to the consumer. Some exporters, including the larger ones, do not want to get involved in too much marketing activities and sell their products FOB or CFR.

Of the companies already exporting to US or EU, they rely almost totally on their distributors for in market promotion, at best some of them provide additional cases of products for promotion or cash to partially cover some promotional costs, but the event or activity is decided by their distributors.

- *In market Distribution*

Companies who receive small orders such as one or 2 pallets state that they could do much more business if their products were housed in the marketplace from which the dispatch of the goods could be easily made. Their experience is that buyers do not want to get involved in the export process.

More warehousing facilities are needed. Cacao Growers Association in Belize for example could expand sales of their organic dried beans if moisture free warehousing facility could be accessed in the USA.

For other companies who ship even container loads, they feel that a well organized and efficient in market distribution system can expand the reach of their export goods to other buyers in the USA and to other countries in Europe.

- *E commerce solutions*

Companies need e commerce solutions to assist with on line sales. Many have considered using Amazon as a platform as it offers good opportunities however they said that the fees are too high.

## TARGETS AGAINST ACHIEVEMENTS

The project's TOR assumed that at least 90 companies would be classified and their market readiness determined.

From these 90 companies, the relevant data on products, capacity and overall readiness of the companies, would be fed into the in market phase of the project where the type of in market service appropriate for the needs of our exporters would be determined.

For this target the TOR made the assumption that there was a good size pool of SMEs in the Specialty Food sector in the Caribbean with the interest, capacity and potential to export to the US and EU. , The activities as planned to achieve the targets were all implemented by the NEX Team however it was not possible to meet this stated target.

In the Inception Report, the possible threats to the successful achievement of the targets on the supply side which were outside of the control of NEX were outlined. These include the following:

- Lack or limited interest or commitment by some stakeholders in exporting to US and EU markets;
- Unforeseen events like natural disasters, institutional crisis, serious disturbance, etc. that affects the region and the target during the period of implementation.

NEX further stated that its team will however work closely with the Contracting Authorities and other stakeholders to seek to mitigate risks, where possible, should these become apparent.

The Project experienced the stated threats as there was lack of interest by some of the firms that were expected would have participated. Some firms did not respond to

communication either in writing or via telephone calls from the BSO or from the NEX representatives. Others gave various reasons why they were not interested at this time.

These reasons include responses such as:

- This is holiday period, wrong timing as some staff on leave
- What will I get out of it for my company?
- Caribbean Export takes too long to act on recommendations
- Not another questionnaire
- Additional opportunities would require expansion and I cannot do that at this time
- Not appropriate for my business
- Am pretty much established in those markets
- Am involved in another project targeting the US market at this time
- More interest in the ethnic market and not in the Specialty Food (this was the case in several firms from DR and some in Jamaica)

Additionally, some companies requested additional time to fill the form and promised to return them but never did in spite of several reminders and follow up.

Due to the damage to Dominica from a recent storm, one exporter who wanted to participate advised that they could not as focus now is on getting things back to normal.

The BSOs in the targeted countries tried their best to mobilize the firms and in some cases it proved challenging as they did not get the required level of response. The reach to mobilize firms went beyond the main BSO, as in Jamaica for example, in addition to the efforts of JAMPRO; contacts with the companies were also made by the Jamaica Manufacturers Association and the Jamaica Agro Producers Association.

The Activities as stated in the TOR in relation to the supply side which are listed below have all been met.

- Visits are to be made to Belize, Dominican Republic, Jamaica St Lucia, and Trinidad and Tobago. In each country, the Consultants will conduct a workshop to:
  - disseminate information about the proposed arrangement to provide in-market liaison to Caribbean specialty food producers; and the typical operations of providers of such support services including the range of services provided and the fees/prices charged by providers;
  - gain an understanding of the challenges and experiences of agro-processors in penetrating and growing their market share in the US and EU markets; their specific in-market support service needs; and their willingness and capacity to pay the typical fees/prices charged for in-market support services;
- Distribute the data collection instrument/s to selected enterprises in other countries where products described as “good bets” are produced and liaise with BSOs and producer associations to follow up with enterprises in order to obtain a high response rate.
- Utilizing the information compiled, prepare a draft Export Readiness and Supply Capacity Assessment Report.

The only target that has not been fully met is as follows: *Conduct visits to a minimum of 90 agro-processing enterprises in the countries listed (Belize, Dominican Republic,*

*Jamaica, St Lucia, Trinidad & Tobago) to collect the data on export readiness and supply capacity.*

For all these countries except in the case of the Dominican Republic there was a 40% achievement of target. For the Dominican Republic it was 20%. The overall picture for all 5 countries is therefore is 33% achievement.

From the initial number of 157 companies contacted to inform them about the project and to seek their participation, it could have been possible to meet the target of 90 firms visited, had the interest by firms been higher.

See ANNEX III: Detailed Company Response by Country.

While the project did not meet the target in terms of numbers of firms, it has identified a core group of companies having significant export experience, have good products and meet the criteria for expanding sales into the two targeted markets. This group would become the pilot to “pave the way” for other exporters who were not part of the project. It is anticipated that once the in market liaison services are identified and other exporters see this initiative as promising good results, they will begin to show interest and would become users of the services

See ANNEX VII: Grading of Companies and Justification.

**Table 6: Grading of Companies**

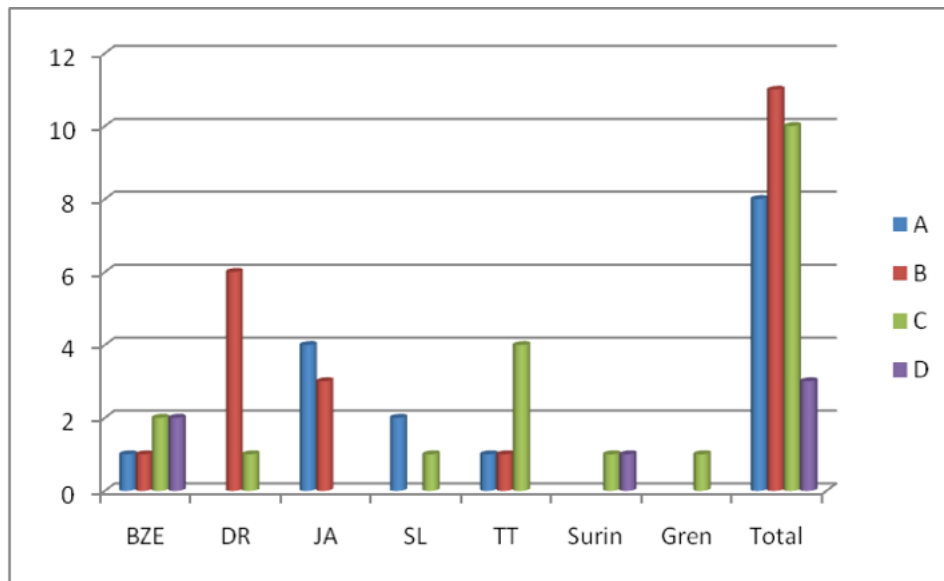
Country	Category			
	A	B	C	D
BZE	1	1	2	2
DR		6	1	
JA	4	3		
SL	2		1	
TT	1	1	4	
Surin			1	1
Gren			1	
<b>Total</b>	<b>8</b>	<b>11</b>	<b>10</b>	<b>3</b>



Category A (8 companies) are those ready for further expansion into the markets, they have the quality systems in place, good products, capacity for expansion and export marketing experience.

Category B (11 companies) are those who will require some adjustments to make them fully market ready. Many of them are presently exporting to the US and EU and both groups represent the likely users of the In Market Services to be identified.

Chart showing Grading of Companies by Country



The Category A companies are:

Country	Company	Products
<b>Belize</b>	Marie Sharpe's Fine Foods Ltd ( female owned and managed)	<i>Marie Sharp's</i> :Habanero Pepper Sauces, Tropical Jams & Jellies, Seasonings, Fruit Squashes
<b>Jamaica</b>	Perishables Jamaica Ltd	<i>Tops/Sipa Cuppa</i> :Herbal Teas
	Tijule Ltd	<i>Juliana</i> : Jerk Seasoning, Sweet & Barbeque Sauces, Processes Vegetables
	Southside Distributors Ltd ( female owned and managed)	Southside:Jerk Seasoning, Jerk Sauce, Solomon Gundy, Processed Vegetables
	Central Food Packers Limited	<i>Sunrite Select</i> :Pepper Jellies Pepper Sauces, Jerk Seasonings, Sorrel Jam, Mango Chutney, Processed Vegetables
<b>St Lucia</b>	Vicking Traders	<i>Viking</i> : Banana Ketchup, Rum Cake, Spices, Pepper & Barbeque Sauces
	Baron Foods	<i>Baron</i> : Banana & Tomato Ketchup, Barbeque, Hot & Specialty Sauces, Salad Dressings, Spices & Marinades
<b>Trinidad&amp;Tobago</b>	KC Confectionary	<i>KC Candy</i> :Bubble & Chewing Gum, Hard Candy Toffees & Chews, Lollipops, Candy Bars

## SERVICES REQUIRED FOR MARKET READINESS

It is very evident that companies need to have the various constraints which have been identified by them resolved. Many of these are recurring issues over many years and they still remain which means

that the attempts made to address these, if any, have not been very successful. The companies therefore can only become export ready when the identified company and market issues have been resolved.

A carefully designed and implemented coaching programme would significantly increase the export readiness especially for the SMEs or even the larger firms which are about to enter the export arena. Such coaching service would provide the training and guidance necessary on in company issues as well as in market issues. This service would enable the firm to have the confidence that the logistics support to get goods to market and the distribution system in the markets would have been clearly defined so that when they are ready for export such matters would have been already planned out.

Technical support is also required to provide services in areas such as; product development, packaging and labeling and compliance with regulations. Of critical importance is the compliance with food safety regulations as the assessment showed that many companies were not aware or had not begun to put the required systems in place.

Exporters need to be fully aware of the new trends in the markets, and they should be assisted with the tools necessary to enable them to position themselves to take advantage of the opportunities that exist. This could include access to market intelligence, market regulations in a format that is easily accessible and understood and updated in order to remain current.

In addition, feedback from the markets on any adjustments that may be needed to the products to make them more market ready for the niche identified along with the demand that exists to enable better planning for sustained exports.

## RECOMMENDATIONS

The services mentioned above i.e. coaching, technical support and market Intelligence are being recommended for firms that are not export ready. These services should be made available to them collectively as appropriate and where practical, as well as on an individual basis.

Through these interventions firms would be able to resolve constraints listed below which have been identified by them as retarding their ability to take advantage of export opportunities.

The constraints identified by the firms and are to be addressed include the following:

- **Compliance with US and EU standards for food safety**

There is widespread deficiency in the knowledge or understanding of the current and newly implemented health standards that regulate food imports into the US.

These regulations are currently undergoing reforms and a newly published law, the Food Safety Modernization Act (FSMA), as passed by Congress will reform the food industry entirely. The new law is one based on clear establishment of Preventive Controls(PC), defined Standard Operating Procedures(SOP), proper implementation of Hazard Analysis and Critical Control Points (HACCP) programmes, application of the new Good Manufacturing Practices standards (GMPs) as published in the 21CFRSection 117), and maintain validated supporting records. In addition, FSMA's compliance will be based on in-plant audits by US regulators or by accredited third party agencies in territories outside of the US.

If Exporters of Specialty Foods do not become compliant with these new regulation, their products would be denied entry into the US, The BSOs in each Country needs to ensure that detailed information reaches all the exporters and potential exporters and that a coordinated technical assistance programme be implemented to assist especially the smaller firms to become compliant. Coordinated approach for a group of companies will keep the costs to the individual firm down.

- **Sourcing of Raw Material**

Established exporters have special arrangements with farmers and others to ensure supplies of raw material- fruits, vegetables and seasonings. They also train these suppliers in proper care and hygiene of the material before they are delivered to the factory. Traceability systems are also in place. Smaller exporters need to strengthen such links.

While the extent to which food processors and the Ministry of Agriculture in the countries collaborate /share information on needs has not been determined, this collaboration is critical for the development of Agro parks to help drive production of crops used as ingredients to meet demand of the agro processors.

Some of the companies have difficulty sourcing raw materials during periods of drought when local production of the crops used as raw materials is significantly reduced. This is a recurring problem and if there does not already exist a data base of suppliers outside of the home countries then this should be developed and arrangements to source supplies made early.

Many food processors presently source raw materials from Central America and their Caribbean neighbours. The opportunity exists for collaboration among CARIFORUM firms to collaborate in establishing business partnerships in countries like Guyana and Belize for the production of raw materials. Such partnerships if strategically developed and well managed could be the solution to the problem of raw material shortage that many processors experience at certain times of the year.

- **Costing**

Companies need to be aware of all the various elements that should be included. They will need assistance in determining what should be included and the relative amounts of each to be applied for all the various inputs. In addition to production costs, others include: marketing costs, liability insurance, IP registration, certifications, analyses etc.

- **New Product Development**

This is a major area for consideration and needs have been identified for equipment, technology, Packaging etc. Companies have ideas of possible new products that they could do as “off shoots” from their main processes but need research and development to determine feasibility of these. The specialty food sector in the region needs to develop new products that the markets are looking for.

Work also needs to be carried out to determine what could be done to foods now classified as Ethnic to move them into the Specialty Foods group. It may just be a matter of packaging and labeling. For example, the large cans of products -.19 oz (540g) - vegetables and juices target the ethnic market. If these are packaged into smaller and in more attractive containers with appropriate branding, could these be come attractive to the eye of the Specialty Food buyer?

- **Documentation on market requirements and success factors.**

Some exporters are not aware for example that their brands should be protected in the markets until someone has registered their brand and their authentic products are denied entry. IP registration is expensive but is less expensive than having to rebrand products after the regional exporter discovers that they no longer own that brand in the market. Exporters should be encouraged and assisted to protect their brands in the overseas markets.

A constant concern from SMEs is that everything that needs to be done to make exporting successful is quite expensive. If some of the interventions can be coordinated for implementation for a group, then the individual cost to a company would be less. For example, to bring a food safety certifying officer into a country or into the region to work with one company, it could cost that company about US\$30,000. If however there could be a coordinated approach where a group of companies work within a set time frame to

get certified and the officer has 3 or 4 clients to process on that visit then the charge out cost to each must be less.

- **In market Distribution**

An In Market distribution system should be identified as companies feel that such facility would enable those who receive small orders such as a few pallets to do much more business if their products were housed in the marketplace from which the delivery of the goods could be easily made. Their experience is that buyers do not want to get involved in the export process.

During the individual visits and at the regional workshop held September 17, 2015 with various stakeholders, the representatives of exporting companies agreed to certain recommendations made for the way forward. They were in support of the proposal for a central coordination point in the region that would have responsibility for ensuring that the developmental interventions are undertaken and that the logistics for meeting market demands are put in place. The companies also felt strongly that a well coordinated “in market services” in the target markets could facilitate significant opportunities for export expansion into new and traditional markets. They however needed to understand how all the elements of these facilities would be organized, how the set up costs would be funded etc.

The concept for the in market services and a central regional coordination will be developed and elaborated on in the feasibility study and business plan for this project.

For other companies who ship even container loads, they feel that a well organized and efficient in market distribution system can expand the reach of their export goods to other buyers in the USA and to other countries in Europe

- **Logistics**

Here again firms would like more opportunities to consolidate shipments. Those firms who receive orders of less than container loads express the need for better logistics services as they are losing export opportunities as their products become uncompetitive when they have to ship small quantities.

## **ANNEXES**



# ANNEX I EXPORT READINESS QUESTIONNAIRE

## EXPORT READINESS QUESTIONNAIRE

### CARIFORUM SPECIALTY FOODS

#### 1. GENERAL COMPANY INFORMATION

Company Name: \_\_\_\_\_ City \_\_\_\_\_ Country \_\_\_\_\_ Date of Visit \_\_\_\_\_

Years in Business \_\_\_\_\_ Location: Urban ☐ Rural ☐ Company Website: \_\_\_\_\_

Location Description: Low income area ☐ Prone to Violence Area ☐ Other: \_\_\_\_\_

Type of Organization: Private Enterprise ☐ Cooperative ☐ Consortium ☐ Other \_\_\_\_\_

#### Total Employment figures:

Full time: Total \_\_\_\_\_ Male \_\_\_\_\_ Female \_\_\_\_\_ Part Time: Total \_\_\_\_\_ Male \_\_\_\_\_ Female \_\_\_\_\_

Administrative: Total \_\_\_\_\_ Male \_\_\_\_\_ Female \_\_\_\_\_ Production: Total \_\_\_\_\_ Male \_\_\_\_\_ Female \_\_\_\_\_

Employees with Disabilities: Total \_\_\_\_\_ Male \_\_\_\_\_ Female \_\_\_\_\_

Type of Disabilities: A: Blindness \_\_\_\_\_ B: Missing limbs or muscular disabilities \_\_\_\_\_

C: Mental Retardation \_\_\_\_\_ Other: \_\_\_\_\_

Does your company have a Corporate Social Responsibility Policy? Y N

Describe your company's Social Community involvement: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

List the current Good Environmental Practices your company is engaged in:

Organic ☐ Green Energy ☐ Water Harvesting ☐ Fair Trade ☐ Other: \_\_\_\_\_

\_\_\_\_\_

## 2. COMMITMENT AND SKILLS

Company's Vision: \_\_\_\_\_

---



---

Is your brand recognized in your local market Y N	Years Exporting _____	% of Annual Revenues that Exports represent: _____%	Export Business Plan in Place Y N
Export Department in Place Y N	Designated Export Manager Y N	Export Manager with assigned responsibility to other staff Y N	Use of Export Broker Y N

Export Practices in house:

Staff Export Experience: Earned in house ☐ Previously Trained ☐

Export Documentation ☐ Export Logistics Coordination ☐ Export Packaging and labeling ☐

US Market Entry Requirements Expertise ☐ EU Market Entry Requirements Expertise ☐

Currently Exporting to (countries): _____ _____	Prospective Export Markets (Countries): _____ _____	Have visited these current and prospective Export Markets: Y N
---	--	---

Average annual Investment Figure in Export  
Promotion Activities and Export  
Capacity Building of Staff:  
\$ \_\_\_\_\_

Is company willing and able to invest in New  
Product design to adapt to new markets  
Y N

Activities in place that support Export Market awareness:

---



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---

Trends that your product line may be aligned with (gluten- free, non-GMO, all-natural, organic etc):

---



---

Are current domestic clients exporting your product:

Y N

Willingness to substantial investment  
to penetrate new export markets:

Y N

If yes, to what countries or markets:

---



---

Does Company sell on line

Y N

Current Website used for On line sales:

---

If Online sales are through a third party portal,  
please indicate:

---

Is your company active on Social Media Networks

Y N

### 3. OVERALL ECONOMIC PERFORMANCE AND CAPACITY FIGURES

Total Annual Revenues	2012	2013	2014
Less than US\$500,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
US\$500,000- US\$1,000,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
More than US\$1,000,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local Sales as % of Total Revenue	____%	____%	____%
Export Sales as % of Total Revenue	____%	____%	____%

Annual increased revenue **potential** with  
current infrastructure: \$ \_\_\_\_\_

What would enable you to reach maximum  
revenue potential with existing infrastructure?

---

Current Growth Trend

Up ☐ Down ☐

---



---

Current Export  
Operations Self  
Sustainable?

Y N

If Not Self Sustainable,  
expected time to reach  
sustainability: \_\_\_\_\_ yrs.

Other foreign  
languages spoken:

---



---

Current Practices in place used to confirm Prospective Export Customers viability and Credit worthiness:

---



---



---

Total Inventory turnover annually  
\_\_\_\_\_ times

Current Excess Storage Capacity as percentage of  
total warehousing \_\_\_\_\_ %

Quality Control and Food Safety System in place:

HACCP ☐ ISO ☐ SQF ☐ BRC ☐

Is there a Quality Control/Food Safety  
Supervisor: Y N

Other: \_\_\_\_\_

#### 4. REGULATORY COMPLIANCE EXPERIENCE

Is there Awareness of Current  
Regulatory Requirement for  
Export Markets

US:

EU:

USDA ☐ FDA ☐

Directorate-General for Health  
and Consumers (DG SANCO)

Basic ☐ Medium ☐ Extensive ☐

Other: \_\_\_\_\_

Y N

Has your product ever been  
detained or refused entry other  
than for normal testing  
purposes?

Was the product that was  
denied entry released for sale?

Was the product denied entry  
discarded?

Y N

Y N

Y N

Do you have contractual arrangements with farmers or other firms in your home country to supply raw materials or other inputs? Y N

Please describe \_\_\_\_\_

---

Does your company practice production efficiency initiatives (i.e.: reduced usage of water, energy efficiency, renewable energy usage, innovative or recyclable waste management, etc.)

If yes, please describe \_\_\_\_\_

---



---

## 5. US MARKET EXPORTS

Currently Exporting to the US  Y   N	If yes, what cities: _____ _____ _____	Are your Exports to:
		Importer <input type="checkbox"/>
		Sales Agent/Broker <input type="checkbox"/>
		Distributor <input type="checkbox"/>
		Retailer <input type="checkbox"/>
		US Affiliate or Partner <input type="checkbox"/>

If no longer exporting to US, reason for cease:	If have not exported to US, what are your potential cities or states?
_____	_____
_____	_____
_____	_____

Annual US Market Export Sales:

**Sales**                      **2012**   **2013**  
**2014**

-Less than US\$300,000    ☐    ☐    ☐

**Preferred Method of Payment:**

Letter of Credit ☐; Advance Payment ☐

Credit Card ☐; Payment on delivery ☐

Open Credit: \_\_\_\_\_ days

-US\$300,000 – US\$600,000 ☐ ☐ ☐

-Over US\$600,000

but less than US\$1mil ☐ ☐ ☐

-US\$1mil-US\$1.5mil ☐ ☐ ☐

-More than US\$1.5 mil ☐ ☐ ☐

Responsible Party (Exporter E or

Importer I for cost of: (circle one)

Warehousing: E I

Product Promotion: E I

Importation/Customs: E I

Damaged/Expired Goods: E I

Do you cover the cost of  
products used for  
sampling and  
promotion

Y N

Does your importer or  
distributor have exclusive  
territorial rights?

Y N

US Trade Shows

participated in:

Activities to be undertaken which are expected to increase Exports to  
US market

Is knowledge and comprehension  
of the US market aspects  
satisfactory for your efficient  
export performance:

Basic ☐ Medium ☐ Strong ☐

If your product is appropriate for  
Food Service Sector, are you  
interested in supplying products  
for the Food Service Industry?

Y N

Are you satisfied with the  
performance of your  
exports operations in the  
US market?

Y N

State health and commercial regulations your  
products must comply with:

Is compliance of these regulations presenting  
challenges Y N

Are there any Non-tariff barriers your exports currently facing

Y N

Describe: \_\_\_\_\_

---

---

Are you aware of the New Food Safety Modernization Act (FSMA) as the new Health Regulation of the US

Y N

---

---

How often do you have company personnel assisting your importer or distributor in the target market in the US

Monthly ☐; Semi-annually ☐; Annually ☐

Other: \_\_\_\_\_

Do you have Intellectual Property Protection (brand registration, formula registration, etc.) for your products in the US market?

Y N

Please state \_\_\_\_\_

---

Describe your main concerns and Issues that are presenting challenges in your exporting process to US markets

---

---

---

How do you think these concerns can be addressed?

---

---

---

Please furnish as much as possible information in the following tables:

**Product Table 5.1**

Product Information		Packaging	
Beverage	<input type="checkbox"/>	Plastic	<input type="checkbox"/>
Dairy	<input type="checkbox"/>	Cellophane	<input type="checkbox"/>
Canned	<input type="checkbox"/>	Carton	<input type="checkbox"/>
Refrigerated	<input type="checkbox"/>	Glass	<input type="checkbox"/>
Other	<input type="checkbox"/>	Other	<input type="checkbox"/>
Low-Acid food	<input type="checkbox"/>	FCE Registration No:	
Acidified food	<input type="checkbox"/>	Product pH:	
Labeling		U.S. Import	
Label Reviewed for US	Y   N	Previously Imported Into the U.S.	Y   N
Labels in English	Y   N	US Importer name	
Label Language:		US Distributor name	
Food Facility Registration		U.S. Agent for FDA communication	
FDA Facility Reg. No.		U.S. Agent	Y   N
FCE Registration No.		Agent Name:	
Food Safety Modernization Act (FSMA)			
Verified HACCP Plan	Y   N	Registered in the Foreign Supplier Verification Program	Y   N
Current GMPs In accordance with CFR-21 110	Y   N	Traceability and Recall Program In Place	Y   N
Preventive Controls Defined and Drafted	Y   N	Standard Operating Procedures In Place	Y   N
Additional Information or Comments			




**Product Table 5.2**

Export Product Characteristics								
Category (dairy, desserts,bever ages,confectio nery,ethnic,con diments, processed veg/meat,etc.)	Product Identity (Sauce,jams /jellies, spice,etc)	ProductDescription	Commercial Product Name	Requires Refrig. <7C Y / N If No, indicate Product pH if fluid or canned	Typeof Process (Pasteuriz d,Retort,U HT,etc.)	Typeof containers /package (Glass, Plastic, paper, can,film sacs,etc.	Package sizes/ Volume	Food Service or Bulk Y / N

## 6. Exporting to the European (EU) Market

Are you presently exporting to markets in Europe?      Y    N

If yes, which countries in Europe are you presently exporting to?

---

What are the sizes of your shipments? ☐ Container Loads ☐ Less than Container Loads

☐ Other \_\_\_\_\_

What mode of transport are you presently using for your shipment? ☐ Sea ☐ Air

☐ \_\_\_\_\_

If you have exported to Europe in the past and no longer do so, why did you stop?

---

If you are not exporting to Europe, which countries would you like to export to and why?

---



---

As an exporter to the EU who is your business partner/or who do you send your products directly to?

Importer	<input type="checkbox"/>	Retailer	<input type="checkbox"/>
Company Subsidiary	<input type="checkbox"/>	Partner e.g. Joint Venture	<input type="checkbox"/>
Sales Agent/ Broker	<input type="checkbox"/>	Distributor	<input type="checkbox"/>

Do you understand the distribution chain in Europe before the goods reach the consumer?

---

What is your preferred method of payment for exports made to Europe?

Letter of Credit ☐      Advance Payment ☐  
 Credit Card ☐      Payment on delivery ☐  
 Open Credit:      \_\_\_\_\_ days

For your exports to Europe, who is responsible for the following costs?

Warehousing if applicable \_\_\_\_\_

Promotions to trade and consumer (e.g. trade fairs, in store) \_\_\_\_\_

Customs clearance \_\_\_\_\_

Damaged/ expired/returned items \_\_\_\_\_

Are you able to bear the cost of providing products required for in store promotions such as: a case of each product for each of the stores in Europe that carry your products, etc.

Y      N

\_\_\_\_\_

Give an approximate sales value for **each** of the last 3 years (or what is applicable) of exports to Europe

<b>Sales</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>
Less than US\$300,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
US\$300,000 – US\$600,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Over US\$600,000 but less than US\$1mil <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
US\$1mil-US\$1.5mil	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
More than US\$1.5 mil	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Does your Importer have certain geographical exclusive distribution rights in the EU for your products?      Y      N

If yes, what geographic areas are these? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What EU Government regulations do your products comply with? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Are there any regulations that are providing a challenge for you?

\_\_\_\_\_

\_\_\_\_\_

Are you familiar with the following:

I. EU Single Market & EUR 1 Certification      Y      N

---

II. Packaging and Labelling requirement for goods entering the EU?      Y      N

If yes, please specify \_\_\_\_\_

III. Prohibited Imports into the EU:      Y      N

If yes, please specify \_\_\_\_\_

IV. EU's transparency and traceability in supply chain rules?      Y      N

If yes, please specify \_\_\_\_\_

Do you supply products in bulk packaging for repackaging in Europe/or for the Food Service Industry/ or as raw material?      Y      N

If yes, please specify and state what products \_\_\_\_\_

If no, are you interested in supplying products in bulk packaging?      Y      N

If yes, state what products \_\_\_\_\_

List the names of the contacts in Europe who import your products and the countries where they are located \_\_\_\_\_

Are you happy with exporting to Europe?      Y      N

If no, what are your concerns? \_\_\_\_\_

How do you think these concerns can be addressed? \_\_\_\_\_

What are your (CEO) plans for increasing exports to the markets in EU? \_\_\_\_\_

\_\_\_\_\_

What trade shows in Europe have you or your staff attended? Please specify and give the year of attendance \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

How often do you visit the EU market to “service your brand” e.g. meet with your importers or to attend events where your products are being promoted? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Do you have Intellectual Property Protection (brand registration, formula registration, etc) for your product in the EU market?      Y      N

Please specify \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## **PROJECTIONS AND PLANS**

What are the short term goals of the company (under 3 years)? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What are the medium term goals of the company (between 3 and 5 years)? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What are the long term goals of the company (5 years & over)? \_\_\_\_\_

---

---

Do you plan to further invest in the company in the next 2-3 years (expansion, machinery, infrastructure, etc) ? \_\_\_\_\_

If yes, please specify \_\_\_\_\_

---

---

Will you finance that investment with your own capital, a loan or joint venture? \_\_\_\_\_

---

---

Do you plan to hire additional staff in the next 2 years? \_\_\_\_\_

What trade shows in the USA, if any, do you plan to visit in the next two years? \_\_\_\_\_

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---

What trade shows in Europe, if any, are you planning to visit in the next 2 years? \_\_\_\_\_

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---

Would the business consider alternative forms of market entry? (e.g. selling with others under one brand)

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**Thank you for completing this questionnaire. Please note that the information provided will be treated as confidential and will only be used for the purposes of this project, i. e. to determine export readiness and supply capacity and in order to develop an appropriate business plan for the most viable In–Market Liaison services for Caribbean specialty food exporters.**



## ANNEX II

## COMPANY SUMMARY DATA FROM ASSESSMENT TOOL

NAME OF COMPANY	EMPLOYEES				EXPORT INFO				STANDARDS							
	YEARS IN BUSINESS	NO. FULLTIME EMPLOYEES	NO. PARTIME EMPLOYEES	NO. MALES	NO. FEMALES	NO. YEARS EXPORTING	EXPORTING USA	EXPORTING EU	HACCP CERTIFIED	VERIFIED HACCP PLAN	HACCP SYSTEM IN PLACE	GMP CERTIFIED	CSR	IP PROTECTION US	IP PROTECTION EU	
Agro	1	n/a	n/a	n/a	n/a	0	0	no	no	no	yes	yes	no	yes	no	
Baron Foods	24	76	0	31	45	15	yes	yes	no	yes	yes	yes	yes	no	yes	
Belles Ruches	2	1	2	3	0	0	no	no	no	no	yes			yes	no	
Belize Chocolate Factory	8	10	0	2	8	0	no	no	no	no	no	no		yes	no	
Caribbean Coffee House	35	15	4	8	11	25	no	no	no	no	no	yes		no	no	
Caribbean Labs	15	16	0	4	12	12	yes	yes	no	no	no	yes		yes	no	
Caribbean Premier Products	6	56	0	30	26	0	no	no	no	no	no	yes(?)		yes	no	
Caribbean Treats	5	40	0	10	30	5	yes	no	no	no	no	no		no	no	
Central Food Packers	30	140	0	19	121	30	yes	yes		yes	yes	yes		yes	yes	
Che'il	4	2	1	1	2	0	no	no	no	no	no	no		no	no	
Cofrasa	30	58	2	39	21	20	yes	no	no	no	no	no		yes	no	
Country Traders	24	20	0	11	9	15	yes	yes			yes			no	no	
Fresh Start	21	25	0	12	13		no	no	no	no	no	no		yes	no	
Frutos Szhiva Pachamama	3	0	4	1	3	0	no	no	no	no	no	no		no	no	
Helados Bon	43	221	0	173	48	10	no	no	no	no	no	no		yes	no	
Home Choice	16	9	15	12	12	4	yes	yes	no	no	yes	yes		no	not yet*	
Hot Mama's	11	10	2	5	7	8	yes	no	no	no	yes	yes		yes	no*	
J&J Spirits	7	8	3	7	4	5	yes	no	no	no	no	no		no	yes/no*	
KC Confectionary	93	165	0	105	60	42	yes	Martinique	no	no	yes	no		yes	yes	
Marie Sharp's	34	35	5	11	29	28	Yes	Yes			yes			yes	no	
Nut-Med	15	14	6	7	13	12	yes	no	no	no	yes	no		no	no	
Oh Foods	15	16	0	8	8	2	no	no	no	no	unsure	yes		no	no	
Perishables Jamaica	35	14	5	15	4		yes	yes	no	no	yes	yes		no	no	
Proagro	10	40	0	24	16	0	no	no						no	no	
Procesadora Vizcaya	29	60	0	30	30	9	yes	yes	yes	yes	yes	yes		yes	yes?	
Rafah Foods	2	2	5	2	4	0	no	no	no	no	no	no		yes	no	
Sorena's	15	5	7	1	11	0	no	no	no	yes	yes	no		yes	no	
Southside Distributors	9	42	12	38	16	7	yes	yes		yes	yes	yes		yes	no	
Sun Eaters	2	1	2	3	0	0	no	no	no	no	no	no		yes	no	
Taste of the Caribbean	10	5	0	4	1	9	no	yes	no	no	no	no		yes	no	
Tijule	30	64	0			30	yes				yes	yes		yes	no	
Viking Traders	36	50	0	20	30	5	yes	yes	yes	yes	yes	yes		yes	no	

\*application in pr  
\*name taken  
\*answered yes an

\*please verify ans

**ANNEX III**
**DETAILED COMPANY RESPONSE BY COUNTRY**

Companies/Organisations Invited to Initial workshop/ introduced to SFILLS	Attended Initial Workshop	Received Assessment Questionnaire	Interest after Follow up by NEX/ BSO	Returned Assesment Questionnaire	Company /Factory Visit made by Nex Rep
---	---------------------------------	---	---	--	--

**DOMINICAN REPUBLIC**

Casa Calin	√	√	√		
Procesadora Vizcaya	√	√	√	√	√
Caibbean Labs	√	√	√	√	√
Cooprolacfro	√	√	√		
Conaleche	√	√	√		
JJ Spirits		√	√	√	√
Frutos Szhiva- Pachamama		√	√	√	√
Casabi					
Exotic Fruits					
Jugo noni					
Casabe Guaragano					
Kikaboni			√		
Naturelle	√				
Helados Bon	√	√	√	√	√
Coopdeci	√	√	√		
Nikay Bio Proceso	√	√			

CYA	√	√			
Promango	√	√			
Ron veleiro	√	√			
Inversiones Blutellcom					
Flaquer y Cia					
Am Frutas					
Baldom					
Barceló					
Beica					
Bermudez					
Brugal					
Cluster de mango	√	√			
Cortes & Hnos		√	√		
Criollísimo					
EKO-BIO					
Grupo Bocel		√	√		
Grupo prodalsa					
Huevos paola					
Proagro		√	√	√	√
Jugos antillas					
Karoma					
Liquid sugar					
Macadamia la loma					
macapi					

Mardi					
Productos mama					
Profruveca					
By Bakery		√	√		
CONACADO		√	√		
Eva Comercial		√			
Audrey Tromp- Nagua Shelfish		√	√		
Taino Beverages		√	√		

#### ST LUCIA

Baron Foods St. Lucia Ltd		√	√	√	
Viking Traders Ltd	√	√	√	√	
Plass Kassav		√	√		
Rain Forest Foods	√	√	√		
Frootsy Foods Ltd	√	√			
Back to Roots	√	√	√		
Dr Wee Agro Processing Ltd		√			
Belles Ruches Apiary	√	√	√	√	√
Fresh Nuts		√			
Mille Fleur Honey Producers		√			
Ali Rose	√	√	√		
Sunfresh Ltd/Winfresh	√	√			
Fond Assau Agro Processing Group	√	√	√		√
St. Lucia Marketing Board	√	√			

## TRINIDAD AND TOBAGO

Associated Brand	√	√	√		
KC Confectionary	√	√	√	√	√
Suneaters	√	√	√	√	
Caribbean Treats	√	√	√	√	√
Oh Snacks	√	√	√	√	√
Fresh Start	√	√	√	√	√
Caribbean Coffee House	√	√	√	√	√
Chief Brand	√	√	√		√
TT Fine Cocoa Company	√	√	√		
Simply Delightful	√	√	√		
Jus Rite	√	√	√		
Bakery Treatz	√	√	√		
Habits Link	√		√		
National Canners Limited	√				
Perfect Peppers	√				
Trinidad and Tobago Fine Cocoa Company					√

## JAMAICA

A Taste of the Caribbean	√	√	√	√	√
All Natural Caribbean Spice					
Ashman's Food Products					
Associated Manufacturers	√				
Aunt Lola's Jerk Sauce	√	√	√		√

Bankra Buys					
Bare Nutrition		√			
Belcour Preserves Ltd		√			
Blue Mahoe Estates					
Blue Ribbon Manufacturing					
Canco Ltd		√			
Carleston Products		√			
Central Food Packers	√	√	√	√	√
Chamelleous Ltd		√			
Coffee Solutions					
Coffee Traders		√			
Connoisseurs Choice					
Continental Baking Company		√			
Country Traders		√	√	√	√
EMX Media Group	√				
Eva Natural Products					
Goshen Manufacturing & Distrib.					
Gray's Pepper		√			
HomeChoice	√	√	√	√	√
Honey Bun		√			
Jamaica Standard Products					
Jamaica Teas	√	√			
JP Foods		√			
King Pepper		√			

Mamme Products	√				
Matie Sauce	√	√			
Mavis Bank Cofffee					
National Baking Co					
Native Food Packers Ltd		√			
PA Benjamin		√			
Patwa Apparel (10 Fyah Side)					
Pedro Plains		√			
Perishables Ja	√	√	√	√	√
Pioneer Chocolate Co		√			
Real Rock Beer					
Shavuot Farms		√	√		
Southern Processors		√	√	√	√
Spike Industries					
Spur Tree Spices		√			
SueTru Caribbean		√			
Suntrax					
Taylor Food Products	√				
Technosol Ltd		√			
The Pickapeppa Co		√			
Tijule	√	√	√	√	√
Trade Winds Citrus					
Transient Trading					
Vineyards Food Products					

West Best Foods					
Bureau of Standards					
Jamaica Agro Processors	√	√			
JAMPRO	√				
Jamaica Exporters Assn	√				
Jamaica Manufacturers Assn	√	√			

## BELIZE

AMARABI's Spices and Seasonings		√			√
Belize Chocolate Company	√	√	√	√	
Caribbean Premier Products Limited	√	√	√	√	√
Che'il Mayan Chocolate Company	√	√	√	√	√
Cotton Tree Chocolate Company		√			
Elaine's Tambranero Sauce/Rafah Foods		√	√	√	
Gallon Jug Agro-Industry Limited		√			
Glorious Belize		√			
Hot Mamas Belize Limited	√	√	√	√	√
Ix'Cacao Maya Belizean Chocolate		√			
La Popular Bakery		√			√
Marie Sharp's Fine Foods Limited		√	√	√	√



Marvellous Dipping Sauce		√			
Ministry of Agriculture					
Bureau of Standards	√				
Chamber of Commerce & Industry					
Ministry of Trade, Investment Promotion					

Please see separate files.

**ANNEX V****REGULATORY COMPLIANCE REVIEW FOR REPORTED AND COMPLETED  
EXPORT READINESS QUESTIONNAIRE****EXECUTIVE SUMMARY**

Upon request of the Caribbean Development Agency and its representatives, and in participation with the development of the feasibility and design of in-market liaison service, we have evaluated a total of seventeen export readiness questionnaires prepared for the Cariforum Specialty Foods export promotion program. The objective of this evaluation and diagnosis is to assess the level of knowledge and compliance of current applicable phytosanitary norms imposed by the United States Health authorities as it applies to the importation of specialty foods into the US market.

The questionnaires evaluated have been submitted by small and medium size companies from the nations of Belize, Dominican Republic, Jamaica, St. Lucia and Trinidad and Tobago. These include a series of questions pertaining compliance of phytosanitary aspects by the applying companies whose answers reflect the voluntary declaration of their own awareness or comprehension of various aspects related (but not limited to) to company registrations, licenses, health certifications, processing permits and economic level of revenues generated by their current exporting activities to the target market.

It is important to indicate that not all applicants declared current export activity which is interpreted as being companies that would be totally new to exporting to such geographical market. From the information evaluated, approximately over half of the applicants have or are currently involved in exporting activities. Of those currently active it is evident that there is widespread deficiency in their knowledge or understanding of the current and newly implemented health standards that regulate food imports into the US. These regulations are currently undergoing reforms and a newly published law, the Food Safety Modernization Act (FSMA), as passed by Congress will reform the food industry entirely. The new law will be one based in clear establishment of Preventive Controls (PC), defined Standard Operating Procedures (SOP), proper implementation of Hazard Analysis and Critical Control Points (HACCP) programs, application of the new Good Manufacturing Practices standards (GMPs as published in the 21CFR Section 117), and maintain validated supporting records. In addition, FSMA's compliance will be based on in-plant audits by US regulators or by accredited third party agencies in territories outside of the US.

From our evaluation, similarities were observed amongst most of the applicant's in their lack of understanding of specific aspects of current norms and of the new law. In addition, although not corroborated, we would venture to suspect that deficiencies in the identification of their products (labeling) would be commonly found which would deem as necessary a review of their labels to confirm proper compliance of food labeling standards.

All of the applying companies present products that do have some attractiveness to consumer sectors of the market, both ethnic and cross over. It is evident that there is commercial prospectiveness among all applicants, however without doing an economic analysis of each particular case, it would be difficult to assess the level attainability of the new regulations or the level of success that each participant would present. Clearly, further capacity building in processing, norm compliance, logistic aspects and marketing support will be necessary to secure measurable success among all applicants.

#### CURRENT REGULATORY ASSESMENT BY COMPANY

#	Company	Country	Observations on US Regulatory Compliance
1	Hot Mamas	BZE	<p>A young company with limited experience in exporting Hot sauces into the US. They must be prepared and review their compliance with FSMA, particularly by implementing a HACCP plan and complying with the new 21CFR 117 code for GMPs. This will be a requirement for exporters to comply by the end of 2016 and this company does not count with it.</p> <p>In addition, they should have their labels for the US market reviewed and perform corrections or confirm compliance prior to continuing exporting in order to avoid recalls or withdrawing product from markets.</p>
2	Marie Sharpe	BZE	<p>Although this company's questionnaire y partially filled in the US norm compliance section, I have knowledge of this brand and trajectory since they are a known player in their product category. From the information in the questionnaire, this company appears not to be aware of the aspects that the new FSMA regulation entails and such is the main challenge for this company in order to continue to expand its sales in North America. Fat implementation and updating their current compliance of the law will facilitate expansion and increasing their current exports to the US.</p>
3	Caribbean Labs	DR	<p>This company appears to have control in their operation and are only seeking market expansion.</p> <p>Although their products are not heavily regulated by the US Health authorities, they must be prepared and review their compliance with FSMA, particularly by implementing a HACCP plan and complying with the new 21CFR 117 code for</p>

			GMPs, This will be a requirement for exporters to comply by the end of 2016 and this company does not count with it.
4	Frutos Pachamama	DR	Although the questionnaire is incomplete, it is understood that this company manufactures frozen fruit pulp which is not heavily regulated by the US health authorities. Certificates of analysis must be in place with every exportation and all labels must be in full compliance of the established regulations. It is important to consider that all fruit products that have been processed should have been processed by a thermal process (i.e.: pasteurization) in order to provide guarantees to the authorities of the safety of the final product regardless of being stored a <10 degrees Centigrade
5	JJ Spirits	DR	<p>This is a fairly new establishment which is pending to discover numerous aspects of the export market characteristics. Although they have their company registered with FDA as a food facility,</p> <p>they must confirm if their registration has been updated and if they currently have an agent in the US as required (agent is not necessarily the importer). All FSMA aspects are not marked as in compliance thus this company is in a very early stage of Health Norms' compliance which can be a risk and a threat if they continue exporting.</p> <p>In addition, they should have their labels for the US market reviewed and perform corrections or confirm compliance prior to continuing exporting in order to avoid recalls or withdrawing product from markets.</p>
6	Procesadora Vizcaya	DR	It is our impression that the form was filled rather quickly and fails to reflect information regarding characteristics of their products, particularly those that are considered low acid and thus the most common to be scrutinized by the US health authorities both at entry and in the market. Label review for all their products is highly recommended.

			<p>This company appears to have control in their export operation and are only seeking market expansion. Although their products are not heavily regulated US Health authorities, they must be prepared and review their compliance with FSMA, This will be a requirement for exporters to comply by the end of 2016 and this company does not count with it.</p>
7	Helados Bon	DR	<p>A solid company in the ice cream business with activity thru the Caribbean market. Very unprepared for export to the US even though regulatory requirements for this type of product is low and attainable without the need of lengthy and costly certification processes such as for milk and low acid products. Based on the aforementioned, this company is in need of solid training and regulatory finding for their specific market within the US since each state has slightly different regulations for importing ice cream and ice dessert into their markets.</p> <p>All FSMA aspects (particularly HACCP plans) are not in place at this company which will also be required for exporting to the US, as well as having their labels reviewed to comply as necessary.</p>
8	Central Food Packers	JAM	<p>An experienced exporter with ample knowledge of the regulatory environment for their products. They count with the required registrations for their products. Although they claim that all FSMA aspects are under control, such must be validated once the norm is published by the FDA to ratify that their compliance is in effect. From their catalogue, it is evident that their experience in exporting and on customer relations is extensive and strong respectively.</p>

9	Perishables JA	JAM	<p>An experienced exporter of leaf and other vegetable teas, they appear to be mature in their export knowledge however lack verification of their HACCP. Under the new FSMA law, HACCP verification and GMP compliance as per the 21CFR Section 117 will be required to be in place by 2016.</p> <p>This company has an excellent website and are an ideal candidate for export market expansion.</p> <p>Furthermore, the questionnaire does not reflect the pH for the beverage which is an important factor to acknowledge in order to assess what additional regulations their products must comply with.</p>
10	Southside Distributors	JAM	<p>This company appears to have control in their export operation and are only seeking market expansion. Since their products are heavily regulated US Health authorities, they must be prepared and review their compliance with FSMA, by reviewing all aspects for this new law, even though they claim that such aspects are under control, it must be verified once the new law is published in the following weeks.</p>
11	Coffee Traders	JAM	<p>Although this report was submitted twice, it remains failing to reflect information for their US health regulatory environment aspects. They indicate their product is a beverage but fail to declare if this requires refrigeration or not and/or the pH of the beverages. Without this information impossible to assess their level of compliance left blank thus impossible to determine their current compliance status. Being that they are already exporting to the US leads us to believe that they may be in compliance; however, it is common that food products are exported to the US and be overlooked by the health authorities at customs on its regulatory requirements' compliance, nonetheless this does not mean that such will always be the case</p>
12	Tijules	JAM	<p>It is important to point out that this company has marked in their questionnaire their special attention to implementing a recognized food safety system in order to better expand in the US market. This will be attained once they implement in</p>

			<p>a structured manner all of the FSMA aspects as published in the new law.</p> <p>Definitely an exporter with ample experience and product variety and who is very much aware of the requirements presented by the health authorities for their products.</p>
13	Home Choice	JAM	<p>Reported of currently exporting to US, products include dried fish, spices and shelf stables sauces. It has been a requirement for many years to have HACCP Plans implemented for seafood. As for sauces, the report submitted fails to declare pH of the products which are necessary to determine its regulatory requirements. If currently exporting to the US, it is likely that product will be detained at customs at any moment. HACCP implementation must be expedited and in place prior to continue exporting and acidity of products must be determined in order to determine proper regulatory compliance for the sauces. It is recommended as requested to have a full label review of all products to be exported.</p> <p>Under the new FSMA law, HACCP verification and GMP compliance as per the 21CFR Section 117 will be required to be in place by 2016.</p>
14	Viking Traders	SL	<p>A small exporter with potential for medium growth. Coconut cream and sauces are low acid and acidified products respectively. Although for acidified products there are no major restrictions, it is important to confirm that there is a Filed Process for the coconut cream and that the acid products have been confirmed by an authorized process authority and letter have been issued to be presented at customs at the entry moment of each importation in the US. As for coffee and other spices (including all other products as well) labeling must be confirmed that is in full compliance of the current regulations. Although they claim that all FSMA aspects are under control, such must be validated once the norm is published by the FDA to ratify that their compliance is in effect.</p>



15	Boron Foods	SL	<p>From the information submitted it appears that this is an experienced exporter with ample knowledge of the regulatory requirements for their products since they are all Low Acid. The report fails to reflect the Low Acid registration number for the plant; however, if their export activity has been for several years and not product detention has been experienced, its evidence that they have registered their production processes with FDA. As to FSMA, it appears that they are clear of the documentation requirements and claim that they are prepared for the implementation of the new law.</p> <p>This exporter will mainly need support in new marketing activities to expand their current sales in the US</p>
16	Caribbean Treats	TT	<p>Shelf stable candy is a not so regulated product in the US market. Nonetheless, quality control analysis as well as of all FSMA aspects are still to be complied with thus this company is in a very early stage of Health Norms' compliance which can be a risk and a threat if they begin exporting.</p> <p>In addition, they should have their labels for the US market reviewed and perform corrections or confirm compliance prior to continuing exporting in order to avoid recalls or withdrawing product from markets.</p>
17	KC Confectionary	TT	<p>An experienced exporter of confectionary products, they appear to be mature in their export knowledge however lack implementation of a HACCP plan and documentation of other aspects related to GMPs, as well as all FSMA regulatory requirements which will be required to comply by 2016.</p> <p>In addition, they should have their labels for the US market reviewed and perform corrections or confirm compliance prior to continuing exporting in order to avoid recalls or withdrawing product from markets.</p>

18	Oh Snacks	TT	<p>A company without any experience in exporting to the US and with limited knowledge or information of the potential target markets and logistic aspects.</p> <p>Shelf stable nut bars are not so regulated product in the US market. Nonetheless, quality control analysis as well as of all FSMA aspects are still to be complied with thus this company is in a very early stage of Health Norms' compliance which can be a risk and a threat if they begin exporting. In addition, they should have their labels for the US market reviewed and perform corrections or confirm compliance prior to continuing exporting in order to avoid recalls or withdrawing product from markets.</p>
19	Caribbean Coffee House	TT	<p>A company without any experience in exporting to the US and with limited knowledge or information of the potential target markets and logistic aspects. Additionally, their knowledge of the health regulations, aspects of compliance and the cost or resources that this entails is apparently nonexistent. Luckily, ground coffee, seasonings and confectionary are products that are not so regulated by the US health authorities. Nonetheless, quality control analysis as well as of all FSMA aspects are still to be complied since its initial stage.</p>

## ANNEX VI SUMMARY OF MEETINGS

### 8/9/2015 Caribbean Coffee House

John Devaux, owner

Tekesha Mayers, operation manager (since 2 weeks)

#### Production

Coffee from Brazil roasted and grinded.

Production of Rum Balls in house. Chocolate mass from USA

#### Wholesales

Private label trading: Seasoning (Mixes of spices), Corn meal,

#### In general:

No GMP, no SOP's, no cleaning plan, no HACCP,

No registration of ingredients, product batches, storage Planning a reorganization in the layout of the premises

#### Summary:

Not ready for export to US or EU. Actions needed:

Set up of SOP's, GMP, and Hazard analysis. Start with registration

Promised to mail: Codex info on coffee and Ochratoxin

### 8/9/2015 Fresh Start

Marcus Sun Kow, Managing Director

#### Production:

Concentrated fruit juices & Ready to drink fruit juices High volume concentrates are imported (Belize) Specialty juices are produced in house.

Products are not pasteurized! Non sterile shelf life 2 weeks by 4°C

#### Summary:

Products are not suitable for export (refrigerated and too short shelf life) No SOP's, nor GMP nor HACCP

Planning a new factory.

ExportTT may support with consultancy on layout and process flow. Without getting pasteurization in the process no export opportunities.

Promised to mail: Codex Alimentarius info on Fruit juices

**9/9/2015**      **ASA Enterprise**

Arfan Khan, Managing Director

**Production**

“Health Bars” (made from nuts, seeds and fruits)

Private label trading: nuts, seeds, dried fruits, mixes, jellies No SOP, nor HACCP.

Batch registration includes ingredients.

In bar production advised to separate between “raw” and “cooked” section (Cross contamination)

**Summary:**

Major risks are mycotoxins (no knowledge about) Health claims on bars will be removed

Needs HACCP plan for export

Promised to mail info on:      Allergens and Codex Alimentarius

Easy method for Mycotoxin detection

**9/9/2015**      **KC Candy**

Ashmeer Mohamed, Sales Director

QA: Diane, Esther

**Production:**

Since 1920 confectionary production in all kinds. 270 staff 75% of production is for export, 35% to USA and Canada. Also export to UK, contacts with other EU countries.

**Summary:**

Old company with well established protocols; Major attention is pests fight. Health claims on butternut bars will be removed

HACCP plan is partly ready, but not fully implemented.

Promised: To check for CBIsupport at import in NL

**9/9/2015      Trinidad & Tobago Fine Cocoa Company**

Ashley Parasram, Director

**Production:**

Started with production September 1<sup>st</sup> 2015. Capacity 15 ton beans per year Marketing USP: Single Estate Chocolate. Export to UK via "Artisan du Chocolat". Well designed production unit with clear cleaning programs (made by Duyvis)

**Summary:**

HACCP plan not started. Major risk is presence of Salmonella.  
Certificate of analysis needed for export. Contact with SGS Germany (specialized in cocoa) Drying process is in hands of beans supplier. Has high risk on microbial contamination.

Promised to mail:      Info / ISO norm Salmonella

Codex Alimentarius Checklist for HACCP plan

**11/9/2015      BON, Ice Cream Factory**

Spoken with .....

Large, well established company with export within Caribbean.  
Export to US was held up by FDA, because the presence of dairy in the product. Have SOP's, GMP and HACCP in place.  
Allergens might be an issue if exporting to EU. No Follow Up from our side.

**11/9/2015      Pro-Agro- Dominicana**

José A. Luciano, Managing Director

Factory completely new build in big hall. Layout according to HACCP and GMP.

**Production:**

Buy ingredients that will be mixed and packaged. Main product is milk powder (Full milk, Arla) Mixed with cocoa (local supply) or with fruits.

Marketing has just started and seems to be very successful.

**Summary:**

Most critical point is the quality of these ingredients.  
Best option is to make suppliers responsible by requiring certificates of conformation by each batch of ingredients.

Critical points:

- Salmonella in milkpowder and in cocoa.

Aflatoxin M (= mycotoxin) in milkpowder No follow up from our side

### 12/9/2015 fruits & Zhiva Pachamama (??)

Nora Lis & Pachi Coquet (Business partners)

Visited the Fruit Farm of Nora.

Organic products do come from 3 farms (Nora, Pachi and 3<sup>rd</sup> party) Nice small factory near farm.

#### **Production:**

Fruits from farms are cleaned outside and processed inside the factory. Main product: fresh pulp in plastic bag (frozen).

No cooking, nor pasteurization.

Fresh product is processed and frozen. Frozen product 2 year shelf life. (based on info from similar products)

Also bottles of alcohol with 10% fruit in it. No sterilization or other process. Rely on alcohol to preserve products.

New product: dried fruits (dried with sun energy) Objective is to cover some fruits (like banana's) with chocolate. Test samples are very soft and contain too much water. Process should be reviewed. (Suggested to look at Codex Alimentarius)

#### **Summary:**

Frozen fruits:

Labels incomplete for export (as well as local)

- No lot/batch number
- No net weight or volume
- No storage temperature (-18°)
- No instructions for use
- No nutritional values

In general: no HACCP in place. Discussed issues for this operation.

EU will need a Salmonella analysis for each batch frozen non pasteurized product imported!

Promised to mail: EU labelling requirements

HACCP example?

Mail to: [pachicoquet@gmail.com](mailto:pachicoquet@gmail.com)

### 15/9/2015 Country Traders (Questionnaire)

- Coffee roasters
- Tortuga Rum Cakes (with Walnuts)

*No visit was made to Company but comments/ questions on the completed form*

*passed to Joy for clarification*

Any potential Issues:

Mycotoxin detection in Walnuts? ??Codex CAC/RCP 59-2005

**15/9/2015      DAVKARR Quality Consultancy Management**

Karen Taffe

General discussion about Food safety and Hygiene.

In general there is a lack of knowledge and training, and ignoring the FSH requirements. Promised to mail her the "Health Claim" issues in EU

**16/9/2015      Perishables Jamaica Ltd**

Lenworth Collins; Special projects officer

Manufacturer of Jamaican Herbal Teas. Export to USA, Canada, UK and Caricom

Packing is in 3 languages (English, Spanish and French)

Very good and thorough Food Safety System in place.

Well documented HACCP and SOP's, with hazards well covered.

- i.e. each batch of raw material is microbial tested (Salmonella, E.coli, etc)
- Positive microbial batches are stored for some weeks in a hot room (By solar +60C).
- Cleaning of mixer is monitored with swabs (Clean-Trace 3M)
- Only issue seen is the possible presence of pesticides or herbicides.

PJ does have 500 farmers supplying the material. There is no written contract to forbid the use of pesticides or herbicides. This issue should be laid down in a contract and irregular tested.

Follow up:      Contact for labelling consultancy in Europe

Contacts for residue analysis in Europe (Because of price in Caricom)

**16/9/2015      Central Food Packers Ltd**

Natalie Grandison, Marketing manager + 2 persons: QA manager, Production manager

CFP is producing canned products (Calaloo, Ackee), sauces (Yerk), cassava flour. Export 90% of production, private labeled, to USA, Canada and UK.

Labeling is customers responsibility

Own Product line: Sunrite and Sunrite Select.

Active in European exhibition: Sial, Anuga, IFE, Food and Drink Expo Time for local nutritional analysis 4-6 weeks.

As most processes are manually, they many employees.

Challenge: to keep hygiene in place with so many people in production facility. (People were working outside production area!)

Risk on pesticide/herbicide limited by agreement with farmers, with audits by QA. HACCP in place and on paper.

No FU

**ANNEX VII**
**RATING OF COMPANIES AND JUSTIFICATION**

Company / Area	Country	Rate	Justification for Rating**
KC Confectionary Trinidad & Tobago	TT	A	The company is export ready by all standards. EU expert found some minor adjustment for EU market, but compliance issues for candy are considered low level. Presentations could be improved based on market feedback
Procesadora Vizcaya	DR	B	Company is HACCP Certified, has authentic products, but need to work on presentation, packaging and promotion for SF
Caribbean Treats	TT	C	Company has interesting products like Chana, spiced fruits. Although currently exporting, it does not have GMP in place (only elements of it), building is not compliance and processing hygiene in general needs to improve. Visit by Food Safety expert was not possible due to a fire in one of the area
Fresh Start	TT	C	They have interesting products such as Mauby and some exotic fruits, but they do not comply with GMP or HACCP. Not ready for export as yet
Pachamama	DR	C	Have interesting organic (in process of certification), community grown fruits, but it does not quantity and compliance capacity.
Belle Riches	SLU	C -	It does not have the quantity to produce for export. However, it is using advance methods and have small operation following GMP. It has premium honey with natural enhanced flavors. Honey is a good market trend currently.
Caribbean Labs	DR	B	It has a variety of products with mix tropical flavor, organic cocoa and other elements which could appeal to the SF market. It applies GMP, but does not have HACCP certification.
Helados Bon	DR	B	Exported to US before. Brand recognition in Diaspora, CSR strong, tropical and original flavoring. Good GMP implemented, HACCP process started. Possibility to export directly to US and not through copacking. Need to upgrade presentation and type of products to target SF.
Oh Snacks	TT	C+	Healthy snacks. Interested in securing organic certification. Exports to Canada and Barbados.



			Needs to improve monitoring of quality and safety systems
Caribbean Coffee House	TT	B-	Rum balls and roasted coffee. Strong presence in gift shops around the region. Wants to follow Tortuga Rum Cake model. Selling online. Needs to improve health compliance. Has new COO to address this.
Viking	SLU	A	Company already exporting to EU and US. They have certifications and indicate FSMA readiness. Their banana ketchup is their best seller.
Suneaters	TT	C	Interesting chocolate, community based, celebrity branded products. Social impact, fair trade. Very small production capacity, lack of business plan.
Proagro	DR	B	Company is new. It has a organic cocoa milk products. It is ready for the local market, but comply with HACCP norms. They are planning to export to US as a second step int their expansion process
Sorena Winery	SUR	C	This company is hard to assess as no visit has been made. But it has potential in terms of products
Agro Cooperative WIUma Fu Srana	SUR	D	Company was not visited or recommended by BSOs, however for the content of the forms, they are not market ready. Too small.
COFRASA	DR	B	Company is strong in food ingredients and it is developing new products for export. It has export capacity.
J J Spirit	DR	B	It has a initial specialized liquor, however this category is different from others in the Specialty Food as distribution channels are different. They are developing new and innovative products and are currently exporting to US and meeting market standards.
Baron	SLU	A	They are successful exporters which have grown in market and products both to US and EU.
A Taste of The Caribbean	JA	B-	Jams, sauces and condiments. Products visible in hotels and airport shops, Exports to the UK, Canada and Caribbean. Needs more work in HACCP preparation
Rafah Foods/E laine's tabranero	BZ	D	Sauces. Micro business not ready for exporting