

# Opportunities in Agri-Processed Foods for the Region

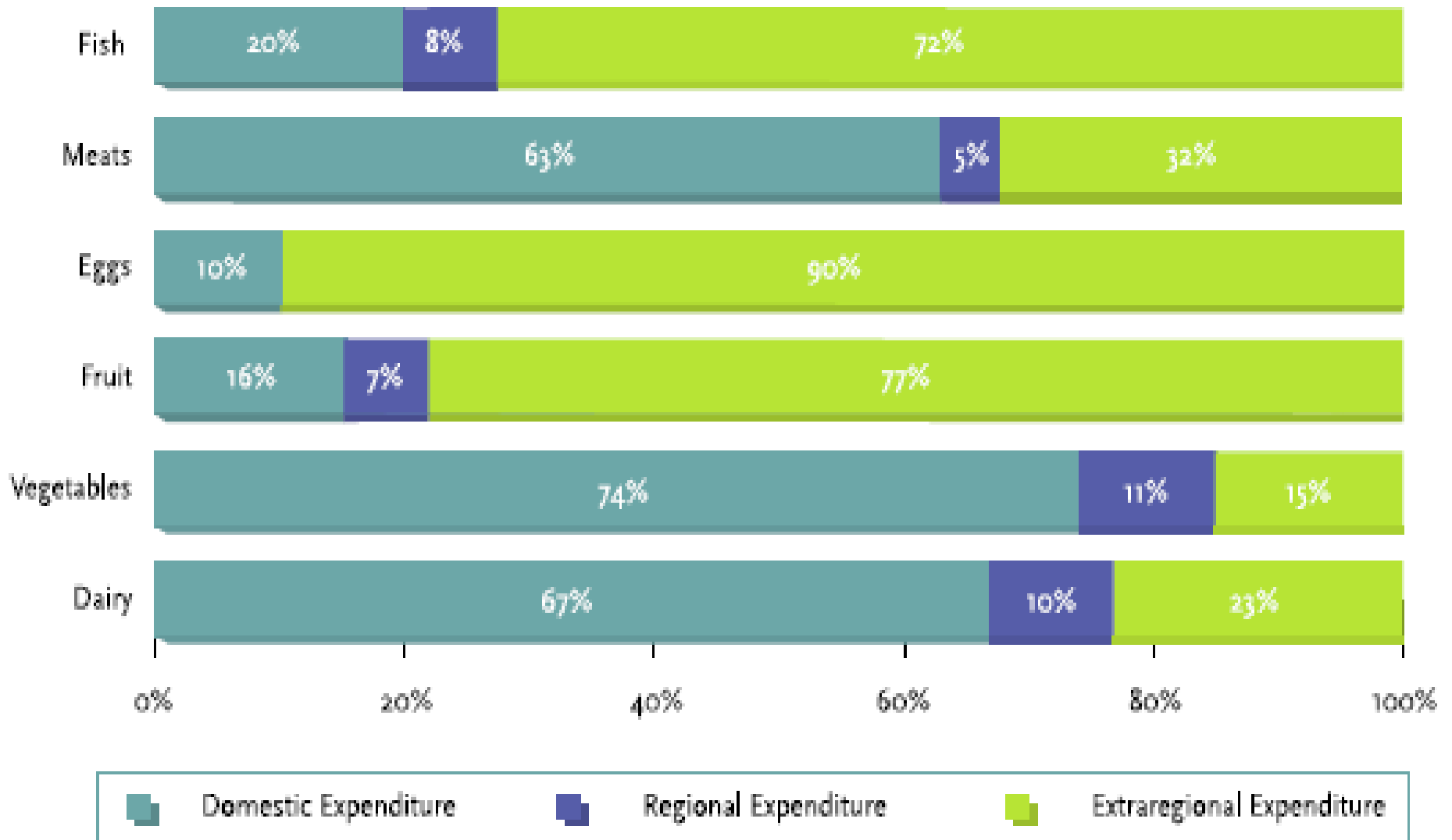


Promoting Trade and Investment Globally



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# Expenditure on Fresh Foods in the Hotel Sector



## Benefits

- a) Increased sale of agri-processed products due to consumption by visitors during visit and “take away/souvenir packages”
- b) Cost efficient method to promote local products to foreign consumers who will continue to consume when they return to their home country and introduce the products to friends
- c) A more differentiated and value-added tourism product. Examples:
  - spa treatments and local wellness food products
  - community based tourism –agri-tourism + cultural tourism + food tourism + eco-tourism

## Benefits cont'd

- d) Increased participation by micro and small enterprises which comprise the majority of agro-processors
- e) Reduced dependence on imported foods to support the tourism industry and reduced foreign exchange leakages
- f) Preservation of local culinary traditions and therefore continued demand for local agro-processed products

# Constraints Linking Agro-processing and Tourism

## CONSTRAINTS

- a) Level of production and therefore reliability of supply of primary agriculture and processed foods
- b) Quality assurance systems along the value chain – from farm to agri-processors to street vendor.
- c) Investment in physical Infrastructure and product development to support the introduction of more value added tourism products:
  - e.g. investment in the development of authentic Caribbean spa experiences that combines Caribbean treatment products, Caribbean music, Caribbean décor, Caribbean food, etc

# Constraints Linking Agro-processing and Tourism

## CONSTRAINTS cont'd

- e.g. investment in infrastructure for hosting of street food vendors and street food festivals in a manner that represents value-for-money for visitors
- d) Positioning of agri-processed products – packaging, promotions, pricing, product features – to meet value-for-money expectations of visitors
- e) Availability of products (online or on-shelf) when visitors return to their home countries

# Planned and Ongoing Projects

## PROJECTS

- a) Technical assistance to spa and wellness enterprises to increase use of local foods and other local content to create a Caribbean spa experience
- b) Training and certification of food handlers
- c) Technical assistance to specialty food enterprises to improve food safety management capacity
- d) Establishing in-market liaison services in the EU and USA to assist specialty food enterprises to penetrate those markets
- e) Training in product development and technical assistance with packaging to micro and small agri-processors leading of products that meet visitors' expectations in terms of taste and appearance

## THREATS

- Increasingly strict entry requirements in import markets (Market Access Requirements)
- Trade barriers/non-trade barriers
- Competition from Latin American manufacturers and products.
- As a net importer of most primary agricultural commodities owing to a small and under-developed agricultural sector, the Caribbean is immensely vulnerable to an increase in global commodity prices.
- Culture of mistrust and reluctance by private sector operators to work collaboratively in clusters or cooperatives



# Products with potential for trade with Tourism

## FOOD

- Pepper sauces, pepper jellies, chutneys, dried pepper
- Jerk sauces & marinades, pepper wines
- Coconut oil (incl. virgin)
- Rum cakes and baked goods
- Crackers and biscuits
- Fruit juices and concentrates

- Bottled coconut water and bottled spring water
- Coffee and herbal teas
- Sweeteners (sugar, honey)
- Seamoss beverages
- Chocolate (incl. organic)
- Rum products and liqueurs
- Frozen vegetables

- Jams, jellies, fruit butters and cheeses
- Indigenous confectionery
- Canned ackee, callaloo, breadfruit, peas & beans
- Cassava pancake/waffle mix
- Cassava bread – gluten free

- Bottled seasonings and casareep
- Dairy products (milk, cheeses, yoghurt)
- Frozen and smoked fish
- Processed poultry & meats
- Fresh and liquid pasteurized eggs

# Products with potential for trade with Tourism – cont'd

- Bottled seasonings and casareep
- Dairy products (milk, cheeses, yoghurt)

## NON-FOOD

- Natural mosquito/insect repellents
- Natural Soaps
- Lotions, sun screens,
- Local crafts for gifts, souvenirs or in-room décor
- Spa products

Potential for trade with Latin America exists within the context of several trade agreements between the CARICOM Region and several LA countries. These are highly under-exploited and trading opportunities, as well as opportunities for intra-regional strategic alliances for agricultural production and processing.

# Product classification with greatest competitive opportunity

Product	Specific Types	Countries with > Opp.
Hot sauces, condiments, dry rubs, marinades	Red, yellow, and green natural sauces Jerk sauces and marinades	Antigua, Barbados, Bahamas, Dominica, Grenada, Guyana, St. Lucia, Jamaica, St. Vincent, Trinidad
Seasoning and herbs	Wet all-natural herb mixtures Dried culinary herbs Convenience (semi-processed) herbal ingredients.	Antigua, Barbados, Bahamas, Dominica, Grenada, Guyana, St. Lucia, Jamaica, St. Vincent, Trinidad
High fibre, complex carbohydrate snacks and convenience foods	Cassava bread Dasheen, breadfruit, yam, cassava and sweet potato bread and crackers, chips, frozen foods Artisanal Caribbean breads, cakes and puddings	Trinidad, Jamaica, St. Vincent, Belize, Barbados, Suriname
Ethnic Foods	Garifuna, Maroon and Ital Carib	Belize & St. Vincent Jamaica, Suriname Dominica, Guyana, Trinidad

# Global Demand Top Markets Sauces and Condiments

Exporter	Demand US\$	Demand (Tons)	Growth in Demand (Value) 08 - 2012	Growth in Demand (Tons) 08 - 2012	Average Applied Tariff
USA	750 mill	372 k	8%	5%	3.7%
Germany	372 mill	128 k	9%	9%	0.8%
France	368 mill	137 k	7%	1%	0.8%
Canada	320 mill	123 k	8%	7%	5.5%
Japan	301 mill	104 k	9%	3%	6.9%
Australia	260 mill	119 k	12%	31%	0%
Hong Kong	185 mill	65 k	15%	8%	0%
South Korea	171 mill	84 k	9%	2%	7.9%
Saudi Arabia	138 mill	57 k	24%	20%	4.6%
Philippines	98 mill	50 k	28%	29%	6.9%

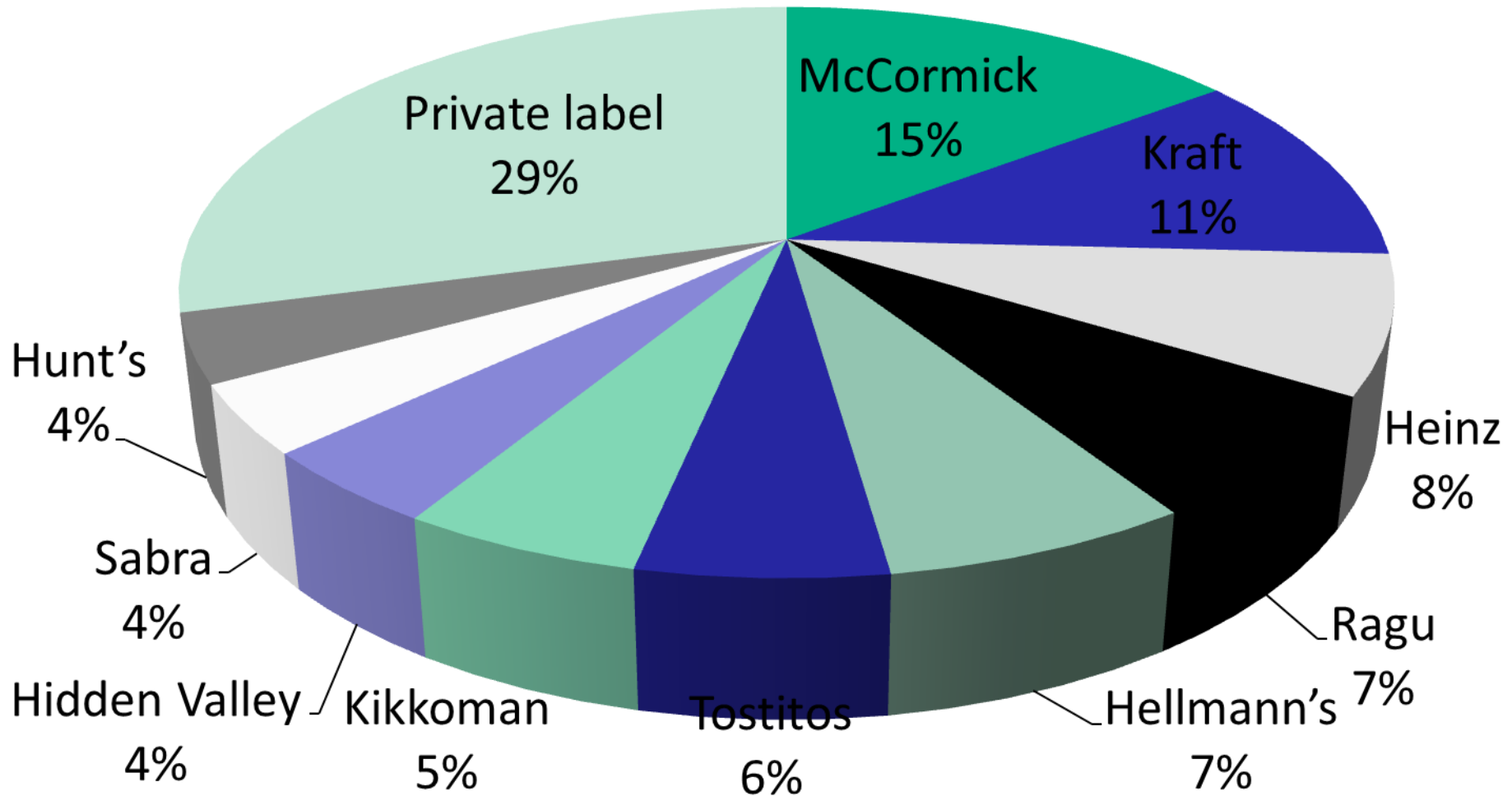
# Sauces, Dressing & Condiments Market

## US Retail Value in US\$ Millions

Categories	2007	2012	2007 – 2012 % CAGR
Sauces, dressings and condiments	16,287.5	18,635.1	2.7
Cooking sauces	4,298.8	4,854.9	2.5
Dips	2,182.5	2,490.6	2.7
Picked products	2,118.0	2,329.3	1.9
Table sauces	6,651.4	7,711.2	3.0
Tomato pastes and purees	433.0	527.0	4.0
Other sauces dressings and condiments	603.8	722.1	3.6

# Top Brand Shares by Company of Sauces, Dressings & Condiments in the US

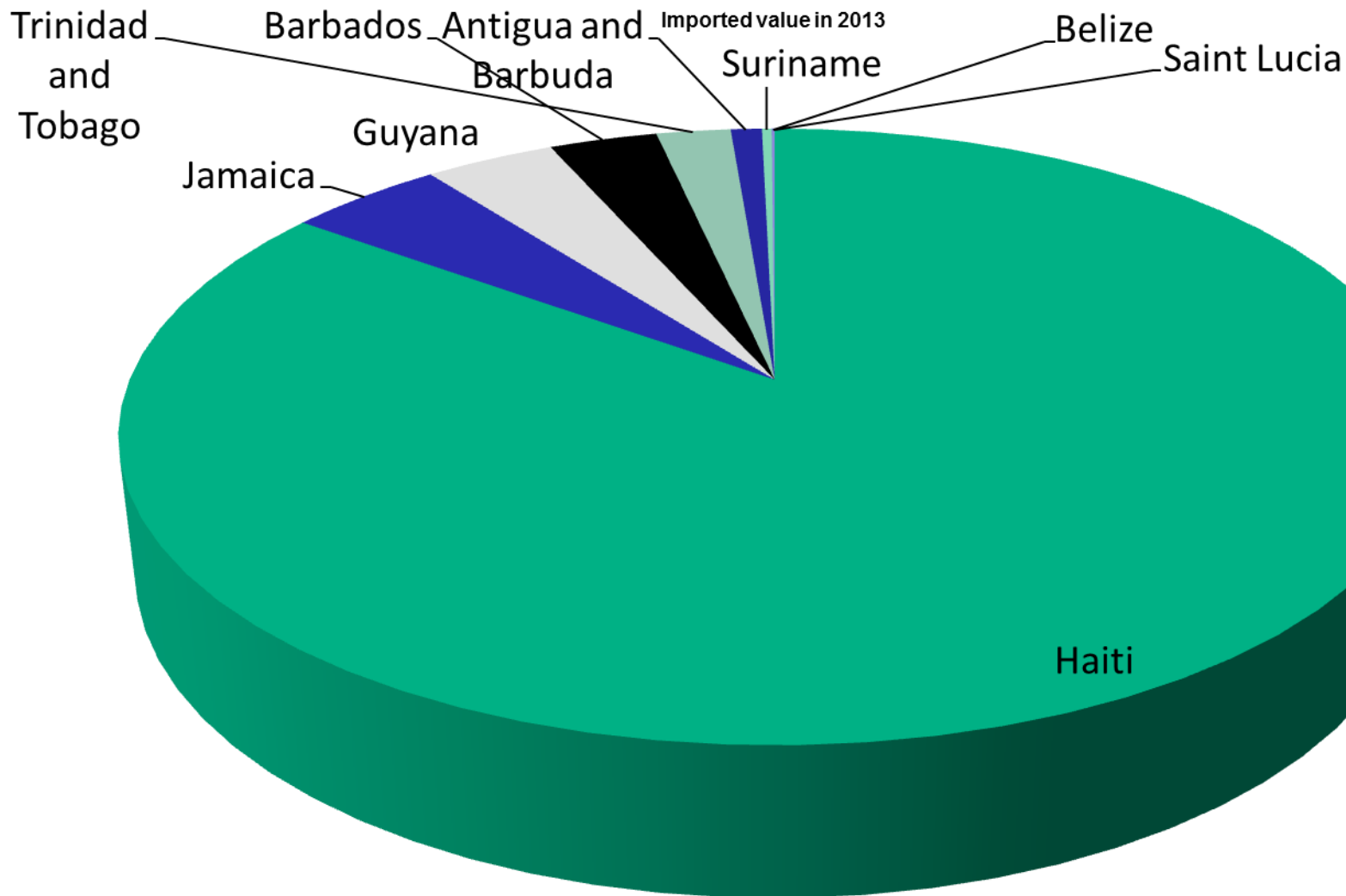
Top Brand Shares by Company (Global Brand Owner) of Sauces, Dressings and Condiments in United States - Retail Value Breakdown



# CARIFORUM Trade with the US

Exporter	Exported US\$	Exported (Tons)	Price sold per unit (Tons) US\$	Growth in Exports (Value) 08 - 2012	Growth in Exports (Tons) 08 - 2012
Dominican Republic	11 mill	6,189	1,906.00	5%	3%
Jamaica	9.5 mill	2,261	4,218.00	9%	7%
Trinidad and Tobago	2.2 mill	674	3,332.00	21%	13%
Belize	454 k	137	3,314.00	7%	2%
Saint Lucia	282 k	101	2,792.00	52%	76%
Barbados	102 k	40	2,550.00	-16%	-15%
Guyana	101 k	38	2,658.00	64%	49%

# Market opportunities in CARIFORUM





# Caribbean Export Programmes

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- The 10<sup>th</sup> EDF Regional Private Sector Development Programme (RPSDP). A 5 years EU funded - 28.3 million Euro programme. 2010 – present
  - **Special Call for Proposal – Food Safety: October 2014**
- CARTFund Programme funded by the UK government – 1.2 million US programme incl extension: 2010 – March 2015
- AFD funded Capacity Building Programme – Food Safety – 1.5 Million Euro: 2015 – 2018
- ACP-EU TBT funded Programme on Capacity Building programme – Training: 2015 for 18mths



Taking Caribbean Excellence to the World

## WHERE TO FIND US

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We encourage small business owners, heads of Business Service Organizations and also investors with an interest in the Caribbean to contact us. You may reach us at:

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