



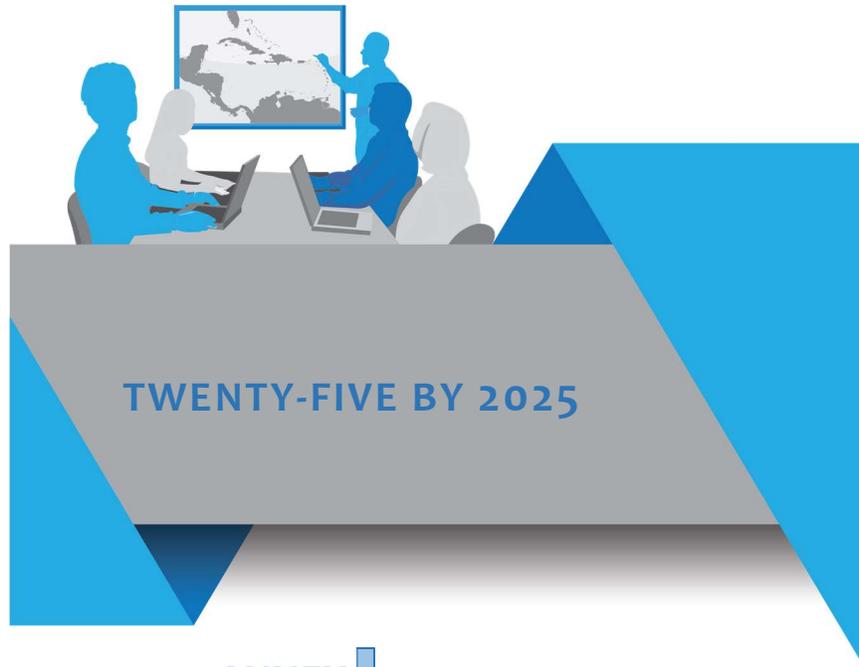
“TWENTY-FIVE BY 2025”

**Reducing CARICOM’s Agri-Food Imports:
Opportunities for CPSO Participation**

ANNEXES – BACKGROUND BRIEFS

List of Annexes

ANNEX 1: Breaking with and Learning from Past Approaches	1
1.1 Past Approaches for tackling Import Substitution/Replacement	1
1.2 A Tipping Point for the CARICOM Agri-Food Sector	5
Who is the Initiator/Demandeur?.....	5
The ‘Regional-National’ Dichotomy.....	5
Maintaining a Focus on Firms.....	6
‘Picking Winners’.....	6
‘Institution Building’ and ‘Investment Targeting’	6
‘Gaps and Missing Links’.....	7
Implementation Deficit, Non-Compliance?	7
ANNEX 2: Conceptual Approach to Developing Private Sector Investment Opportunities.....	9
ANNEX 3: CARICOM’s Trade Performance	12
3.1 Establishing the Context.....	Error! Bookmark not defined.
3.2 CARICOM’s Trade Performance	Error! Bookmark not defined.
CARICOM Merchandise Trade.....	Error! Bookmark not defined.
Total Agriculture Trade:.....	Error! Bookmark not defined.
CARICOM Global Import Profile.....	Error! Bookmark not defined.
ANNEX 4 SHAPING EXPECTATIONS	22
ANNEX 5: DATA FOR TRADE ANALYSIS	25



TWENTY-FIVE BY 2025

ANNEX 1:

**BREAKING WITH AND LEARNING
FROM PAST APPROACHES**



ANNEX 1: BREAKING WITH AND LEARNING FROM PAST APPROACHES

[A significant shift from past approaches is important]

1.1 PAST APPROACHES FOR TACKLING IMPORT SUBSTITUTION/REPLACEMENT

Significant lessons can be learned from the examination of the Region's past forays that have aimed to displace CARICOM's extra-regional food import with regional substitutes. In fact, Prime Minister Mottley's call for the regional private sector to seize the opportunity to significantly reduce agri-food imports, cannot credibly be pursued without an in-depth appreciation of similar past initiatives, their successes/failures, and the lessons learnt from each of these regional 'Import Displacement Plans' engaged by CARICOM Heads since the inception of the Original Treaty of Chaguaramas.

Answers to these questions will avert past pitfalls and will be invaluable in identifying the potential opportunities for the regional private sector investment, and in highlighting the key areas for priority action by both the Community and the CPSO's Members with the objective of reducing the Region's burgeoning food import expenditure as well as the widening negative agri-food trade balance.

Reducing the Region's food import bill has been a focus of CARICOM Integration Policy for the past forty-five years (since 1975), beginning with the endorsement of the Regional Food Plan (RFP), which followed the signature of the Original Treaty of Chaguaramas (OTC). The RFP was formulated on the import substitution development model, which dominated development thinking in most Latin American and Caribbean countries at that time. The RFP did not realize the anticipated objectives as a significant segment of CARICOM's agriculture, at that time, benefited from colonial preferences that created a bias against the development of non-traditional agri-food products.

The RFP was followed by the Regional Food and Nutrition Strategy (RFNS) of 1983. However, the objectives of replacing imports with domestic production in the major import food categories were equally unsuccessful. Mis-aligned domestic and regional agricultural policies, limited support infrastructure and limited technical and financial capacity of the proposed diversification initiatives were among the factors cited for the continuing poor performance as measured against the objectives.

The signature of the Grand Anse Declaration in 1989 signalled a shift by CARICOM to a deeper form of integration anchored in the commitment to move towards a Single Market and Economy. This commitment re-invigorated the regional import displacement thrust, and the RFNS was

replaced by the Caribbean Community Program for Agricultural Development (CCPAD) and the 'implementation-oriented' Regional Action Plan (RAP).

Within the framework of the CCPAD, arrangements and responsibilities for implementing various aspects of both the Plan itself and its ancillary RAP were allocated to various regional, national and private sector umbrella associations, based on a notion of "institutional competence". The underlying philosophical shift from the failed import substitution orientation of the 1970's towards export competitiveness defined the global and hemispheric context in which the CCPAD evolved. This was also accompanied by a proliferation of national and sub-regional projects premised on the identification of priority agricultural crops for export diversification. The gains associated with the period coinciding with the CCPAD were quickly reversed in many Member States of CARICOM, when external financing became unavailable, or when projects encountered insurmountable bottlenecks, emphasising the inadequate attention to critical infrastructure support. In short, financial sustainability could not be maintained when support funds ran out.

Implementation difficulties led to the Regional Transformation Programme for Agriculture (RTPA) being introduced in 1996, with the aim of remedying the implementation shortcomings of the CCPAD. The RTPA, which continues as the consensus regional embodiment of the thrust towards a community policy for agriculture, sought to make the policy initiatives at regional or CARICOM-wide level, supportive of and complementary to, initiatives at the national level. Inherent in this approach was the essential drawback that while the regional programme would reflect a compendium of national actions and priorities that easily dovetailed within the national context, this national focus could result in a failure to seize the synergies and market opportunities at the regional level. With the exception of the few remaining traditional sectors which still responded to the unified policies of "preference granting" countries, enhanced performance by the non-traditional agri-food sector continued to be elusive.

Myriad factors have been identified for the limited success of these predecessor initiatives aimed at formulating a regional agricultural policy for CARICOM capable of displacing third country imports by 'community-wide' agri-food production. From a macro-economic perspective, the bias against diversification into import-competing products heavily mitigated against the success of the earlier RFP and RFNS. This bias derived mainly from the significant price incentives provided to traditional products under preferential arrangements, which often led to resource misallocation.

At the "meso-level" the lack of institutional support was a significant limiting factor. This included major deficiencies in critical supporting infrastructure, such as price and market information systems, standards, marketing and transportation, applied technology and research and development capacity.

There was also a major under-appreciation of the readiness and abilities of micro and small entrepreneurs to carry the 'private-sector led' thrust and to champion the existing and emergent agri-food opportunities.

Ironically, many economic actors in the commercial private sector, such as distributors, merchants, traders and successful food processing firms remained largely unaware of, and largely divorced from the attempts to introduce a regional 'agriculture' policy.¹ This is not surprising since a similar dilemma existed at the national level. Accordingly, the regional initiative was often viewed as being of relevance only to small, subsistence primary producers. Quite simply, the well-intentioned policy goals of Member States did not transmit to the operations of the commercial private sector.

The Jagdeo Initiative (JI) was endorsed by CARICOM Heads of Government at the 25th Regular Meeting of the Conference held in St George's, Grenada in 2004. The JI represented an attempt to operationalise the RTPA, through the articulation of clearly defined intervention programmes aimed at surmounting a specific set of Key Binding Constraints (KBC) to agricultural development, while adjusting the supporting policies as appropriate.

The Initiative by President Jadgeo identified ten KBCs to agriculture development. The year 2015 was the target for the alleviation of these constraints, a timeframe coincident with the achievement of the Millennium Development Goals (MDGs). According to the JI, by 2015 CARICOM's agricultural sector should have:

- a. made substantial progress towards contributing significantly to national and regional development and to economic, social and environmental sustainability;
- b. a transparent regulatory framework at national and regional levels, that promotes and facilitates investment and attracts capital inflows;
- c. significantly transformed its processes and products and stimulated the innovative entrepreneurial capacity of Caribbean agriculture and rural communities; and
- d. enabled the Region (as a whole) to achieve an acceptable level of food security that is not easily disrupted by natural phenomena or man-made disasters.

The trade statistics indicate that since then, the Region's agriculture has drifted further away from the 2015 benchmark established under the JI and the MDGs. The lack of concerted action, including weak implementation plans and schedules, along with the paucity of resources to address the KBCs identified have beleaguered the JI, precluding serious progress.

¹ See 'Implementing the CSME Community Agricultural Policy: Issues, Options and Process' ISBN 13:978-92-9248-091-6, IICA, May (2009)

President Jagdeo recommended that CARICOM Ministers of Agriculture each take direct responsibility for one of the ten KBCs, subsequently consolidated into nine. Ministers of Agriculture were to be supported by a CORE Group of support agencies. Even with Heads of Government having to agree on the KBCs, there has been very limited 'buy-in' to achieve the matching actions by Member States, and with the key stakeholders, particularly the private sector.

In the absence of the requisite institutional architecture with responsibilities assigned according to institutional competence, these 'work arounds' resulted in limited success, as Member States that had joined a regional consensus at various Meetings of the Council on myriad critical reform measures, failed to implement the decisions at the national level.

CARICOM's Common Agricultural Policy (CCAP) 2011 represented a progression of the Community's focus on developing the agri-food, fisheries and forestry sectors in a regional framework. The CCAP took into account the JI (2004) and as well subsumed the Regional Policy for Food and Nutrition Security (RPFNS) 2011-2025, which was adopted by the COTED in 2010. The CCAP recognized the global repositioning of the food sector which, although affected by public policy decisions, was in large part the result of actions and investment decisions by the private sector, and it was designed to respond to these shifts. The CCAP recognized the keys for success as including, *inter alia*:

- (a) sustained political will;
- (b) adequate resources;
- (c) appropriate institutional framework; and
- (d) mechanisms for the coordination and management of resources and activities.

There was also the recognition that an implementation strategy would have been formulated and agreed by the various governing bodies (COFAP, COTED and COSHOD, Community Council and the Conference of Heads) within CARICOM. Statistical evidence, on the performance of the agri-food system, suggests that the success of the prevailing CCAP continues to diverge markedly from the objectives.

An examination of the six major policy thrusts, embarked upon by the Community over the past 45 years, evidences periods of limited positive growth, set against a trend of growing deficits in the agri-food trade balance.

1.2 A TIPPING POINT FOR THE CARICOM AGRIFOOD SECTOR

Several important differences distinguish the '25-25' approach and Initiative being advanced by the CPSO:

Who is the Initiator/Demandeur?

Past agriculture development thrusts by CARICOM, which targeted growing food imports, were largely 'public sector' led and oriented. The focus of these various agricultural development thrusts was largely confined to producers of primary agriculture and to a limited extent on traditional exports. Even where the primary agricultural producers were engaged, the fact that many of the plans did not originate with the primary agricultural sector actors at Member State level led to a lack of ownership and hence, limited uptake of the Community's plans by regional domestic agriculture producers.

Examination of the six Agricultural Development Plans at the Community level, reveals a noticeable absence of participation by the commercial private sector, including intermediate input suppliers, food and beverage manufacturers, and the food distribution, transport and agricultural services sectors. Accordingly, with the progressive shifts in global agri-food markets, and with steadily growing food imports, the Community's major agriculture development manifesto(s), became increasingly divorced from the market developments and opportunities which were accounting for the import growth and the declining trend in intra-regional trade in agri-food products. Evidently, private sector participation and ownership will be important factors in addressing, arresting and reversing the trend in agri-food imports.

The invitation to the private sector to identify the opportunities for investment as a means of more fully realizing the production and trade objectives of the CSME represents a significant shift with past approaches. The correct incentives must now be put in place to create the confidence required for the shift to occur.

The 'Regional-National' Dichotomy

Successive reviews of the various regional programmes have correctly identified a number of major recurrent causes for the limited success achieved to date. Among these are:

- (i) Lack [*apparent lack; emphasis CPSO*] of commitment and interest by CARICOM Member States;
- (ii) Absence of linkages between the regional and national programmes, which severely constrained strong national participation in the formulation, implementation and monitoring of regional programmes and projects.

The private sector impetus for the Investment thrust being undertaken by the CPSO Members, which spans the entire spectrum of firms, from MSMEs to large sized firms and regional Majors, will surmount the challenges to localization and ownership that bedevilled earlier approaches.

Maintaining a Focus on Firms

Firms may be considered the “operating systems” of the private sector economy. Firms pull together production technologies, business methods, market intelligence, and human capital, and coordinate them for commercial purposes. This “know-how” is based on the accumulation of many technologies and capabilities. Importantly, firms retain this know-how for new employees to absorb – and to take with them when they move on to new employment. The availability of skilled workers to new firms is as much, if not more, due to the churn of employment in other firms as it is to formal educational systems.

'Picking Winners'

The economic literature is divided on the practical application of ‘picking winners’ as development champions, at the expense of others. This debate is largely confined to the realm of ‘government-led’ interventions critical to the determination of ‘who succeeds’ and ‘who fails’. As economic operators, the private sector routinely makes investment decisions, based on criteria which vary (though not completely) from those associated with the ‘public-sector’ led approach that characterised the six major policy thrusts adopted by the Community over the past four and a half decades. The incorporation of criteria customarily associated with the determination of private sector investment decisions will undoubtedly elevate the success rate for the investment projects which will be championed or supported by the CPSO Membership.

CPSO Members, many of which maintain commercial operations in third Countries and also in other integration groupings, are acutely aware of the rapid pace of product and process innovation which continues to spawn new agri-food products that compete for ‘shelf space’. These developments dictate that a facility capable of rapidly responding to new investment ideas is a *sine qua non* for breaking the cycle of steady growth in CARICOM's food import bill. Support for the establishment of a Special Purpose Strategic Project Investment Facility (SPIF), which undertakes developing and seeking of suitable partnerships and financing for viable investment projects, will be important in minimizing the dilemma of sound agri-food projects not being realized. Evidently, the SPIF will also serve as a mechanism which ‘crowds in’ sound investment projects that may otherwise have been ‘crowded out’ by the predominantly ‘public sector’ led modalities of ‘picking winners’.

'Institution Building' and 'Investment Targeting'

Understandably so, the six major development thrusts endorsed by the Community, since 1975, and the thirty years since the Grand Anse Declaration reflect a heavy emphasis on a ‘top down’ approach. The advent of the Revised Treaty of Chaguaramas (RTC) and global changes forced the

creation of new institutions and significantly increased the demands on the existing institutions. Successive attempts to address the food import bill through a 'bottom-up', 'whole of private sector' approach, including MSMEs proved elusive. Accordingly, the operationalisation of the regional agri-food development agenda, in which addressing the food import bill was one of many objectives, continued to reflect an overly ambitious 'macro' oriented agenda, which was unclear about roles and responsibilities. This inadequacy was further compounded by limited uptake and even less chance of operationalization by agri-food firms and enterprises in Member States.

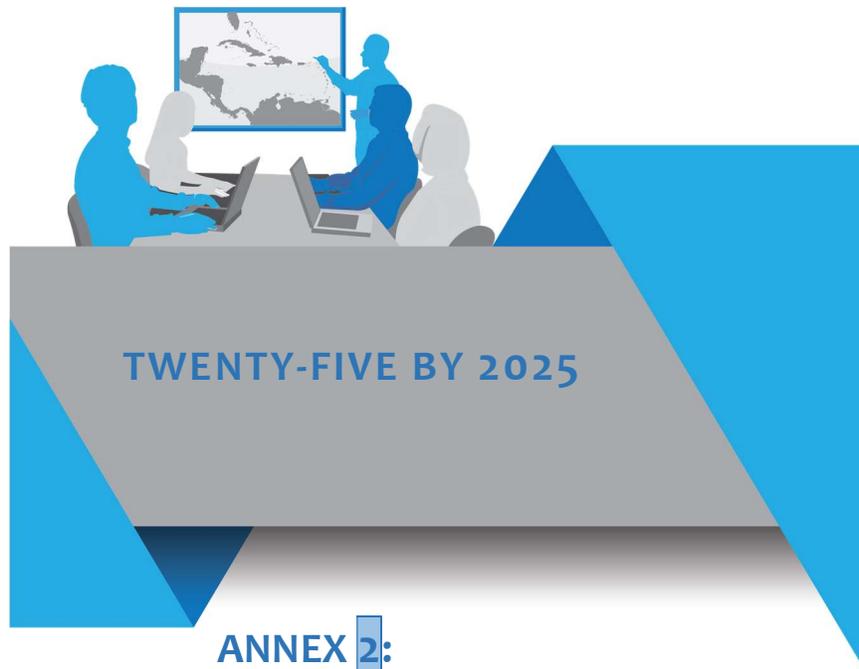
In order to arrest and subsequently reverse the under-performance of the agri-food sector both in the CSME and extra-regionally, greater clarity and simplification, and separation of roles and responsibilities are necessary. The CPSO's approach will focus on the selection of investment projects based on a pragmatic application of 'agri-food corridors' coupled with 'value creation' through entire 'value chains'.

'Gaps and Missing Links'

The various agriculture development thrusts, undertaken by the Community in the thirty years since the Decision to establish the CSME, have also underperformed due to critical gaps and missing links along or around the agri-food 'corridor'. Where the right incentives exist, the regional private sector has demonstrated that it does have the capacity to access the competencies required to champion the business opportunity. CARICOM firms have demonstrated that where 'risk-reward' payback is adequate, there will be a willingness to traverse the gaps and missing links which have restricted investments in various agri-food ventures. Again, the formulation of investment strategies and the building of organisational structures to carry them out must be left to the private sector. Strategic partnerships based on the identification of critical missing links and gaps can then be used to plug the gaps in institutions and infrastructure.

Implementation Deficit, Non-Compliance?

It is generally understood that the Party with the greater degree of control over the risk, should be responsible for bearing the risk. On this premise, the oft-discussed 'implementation deficit' in relation to the Community's Decisions, gives rise to a dilemma, wherein Member States and the Community hold responsibility for acting on the Decisions, but where, when such Decisions remain unimplemented, private sector investor firms often suffer the consequences of this non-implementation, (though the factors that give rise to the delays are beyond their control). There is a need for the Community to devise approaches for imputing consequences for non-implementation of Decisions, on the Party responsible for controlling the risk. In the absence of consequences for non-implementation, private sector confidence will remain weak, (investor pessimism), particularly so for agri-food investments which tend to be subject to greater risks.



TWENTY-FIVE BY 2025

ANNEX 2:

**Conceptual Approach to Developing
Private Sector Investment
Opportunities**



ANNEX 2: CONCEPTUAL APPROACH TO DEVELOPING PRIVATE SECTOR INVESTMENT OPPORTUNITIES

‘Corridors’ are viewed as a promising development construct capable of delivering substantial gains in economic growth, trade and connectivity.²

A burgeoning body of work has emerged on the symbiotic relationship between corridors and regional trading blocs, such as CARICOM. According to Ernst and Young³, combining corridors and regional trading blocs helps to deepen conventional country-based analysis, in a way that enriches strategic thinking about how to spur inclusive and sustainable growth.

A key driver for the CPSO’s interest in the ‘corridor’ approach is the high transactions costs associated with trade and exchange among the Member States of the Community. Business to Business (B-2-B) and Business to Consumer (B-2-C) transport and logistics costs among CARICOM pose a hindrance to investment, productivity growth and market integration.

‘Growth corridors’ are used synonymously with ‘economic corridors’ and ‘development corridors’ to refer to areas which attract transformative investments. In some instances, however, there is the addition of non-economic initiatives (e.g. health and food safety, environment protection [green corridors] and dimensions.

The reforms and support programmes associated with the ‘corridor’ can help improve the efficiency of agri-food input and output markets, transport and logistics, energy access, and national and cross-border marketing and distribution.

Focussing on the development of regional ‘agri-food corridors’ (RAC) within the CSME can assist in reducing transactions, transport and logistics costs and overcome other non-tariff barriers (NTB), and can also be used to develop ‘clusters’ or investment poles, which create the ‘B-2-B’ and ‘B-2-C’ linkages which is the oxygen for sustained growth and development of agri-food ventures in the CSME.

In this way at an operational level, ‘corridor initiatives’ can help in linking policy concerns around regional integration and cross-border infrastructures with private sector development, by engaging the regional and international private sector, including partnerships structured around the urgent need for development of critical cross-border infrastructure.

² Simply articulated, a ‘corridor’ is a conceptual, programmatic and investment framework to develop an area/territory and/or link regions and countries along a physical back bone of transport or other infrastructure (Healey 2004).

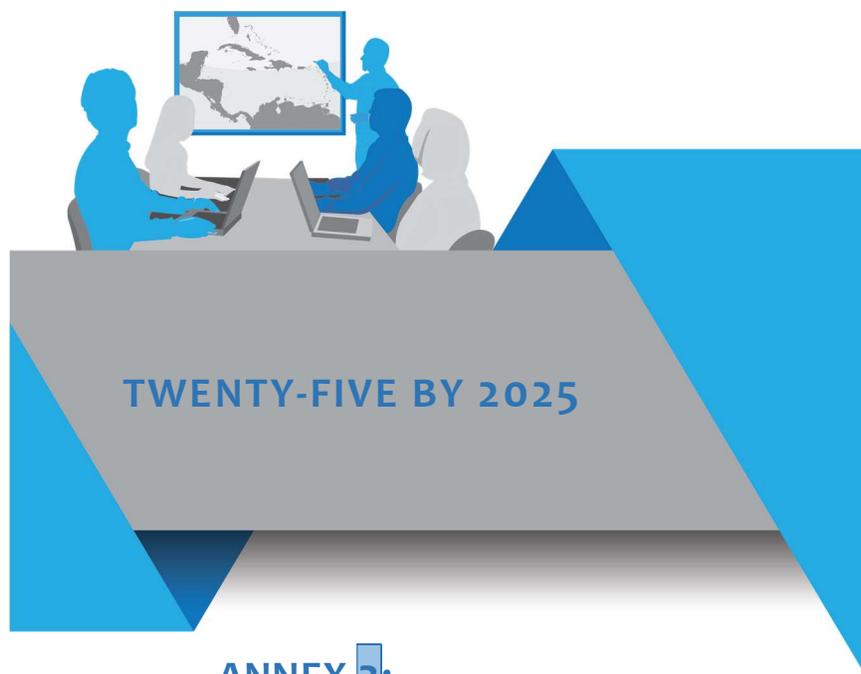
³ Ernst and Young, "Eye on Africa: how to write yourself into the African growth story," Special Issue 2011; available from [http://www.ey.com/Publication/vwLUAssets/Eye_special_ed_Africanm_Growth_Story/\\$FILE/Eye_special_ed_African_Growth_Story.pdf2011a](http://www.ey.com/Publication/vwLUAssets/Eye_special_ed_Africanm_Growth_Story/$FILE/Eye_special_ed_African_Growth_Story.pdf2011a).

CPSO Members share the view that combining the RAC Approach with the value chain analysis, creates a critical link between sectoral strategies to promote structural change towards higher productivity sectors and activities, employment and market opportunities across Member States, with the agri-food sector as the key focus.

RAC is a bi-sectoral solution, in the sense that it aims to create synergies by simultaneously developing both the agriculture and the infrastructure sectors (e.g. transport, energy, telecommunications and agriculture-supporting infrastructure). From this perspective, agri-food based 'corridors' ought to be regarded as critical to improving the connectivity of agri-food markets; contributing to attracting transformative investments in the sector; and creating value networks among agri-business actors in the Member States. Countries and regions where agribusinesses are not agglomerating spontaneously, or not at the desired pace, can catalyse this agglomeration process by implementing Spatial Development Initiatives ('SDI')⁴ which target the sector.

The RAC will assist in linking the 'top-down' policy frameworks which are largely macro in orientation with 'bottom-up' functional initiatives by the private sector (micro in orientation), leading to employment-creating investment and improved livelihoods.

⁴ **Spatial Development Initiative** (SDI) programmes are short-term investment strategies that aim to unlock inherent economic potential in specific **spatial** locations. The programmes use public resources to promote private sector investment in regions with a high potential for economic growth.



TWENTY-FIVE BY 2025

ANNEX **3**:

CARICOM'S TRADE PERFORMANCE



ANNEX 3: CARICOM'S TRADE PERFORMANCE

[Private sector investment in efficiency-based agriculture]

3.2 ESTABLISHING THE CONTEXT: CARICOM'S TRADE PERFORMANCE

CARICOM Merchandise Trade

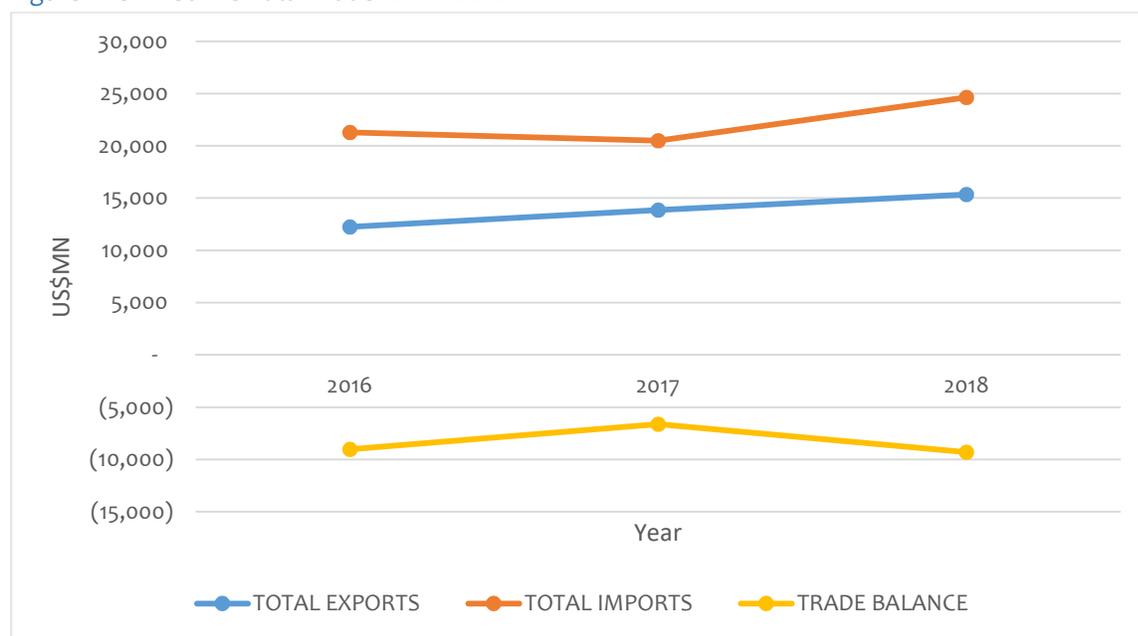
An examination of CARICOM merchandise trade for the period 2016 - 2018 reveals a deteriorating trade position with the trade deficit reaching US \$9.3 billion in 2018. (Figure 1). CARICOM's total exports have shown growth in the last three years, climbing to US \$15.3 billion in 2018. However, total merchandise imports have also increased to US \$24.6 billion contributing to the widening trade deficit (Table 1).

Agri-food imports over the 2016 – 2018 period have also increased. Agri-food imports as a percentage of total merchandise imports have been on the decline, reaching 15 percent in 2018 from 17 percent reached in 2016. The agri-trade deficit as a percentage of the overall trade deficit also fell from 22 percent in 2016 to 20 percent in 2018.

CARICOM's protracted trade deficit places pressures on the Region's fiscal position; and where performance elsewhere in the national economy fails to compensate, foreign reserve challenges have ensued in Member States, with a downward drag on Gross Domestic Product (GDP). The Regional private sector has a major stake in these developments, as the challenges attaching to foreign exchange scarcity have had a direct impact on their trading performance, business growth, and profitability.

For the period 2016 - 2017, the top 50 products imported into CARICOM averaged US \$1.9 billion and represented over 51% of all imported agri-food products. The top 100 imported agri-food products are provided as Annex 5.

Figure 1 - CARICOM's Total Trade: 2016 - 2018



3

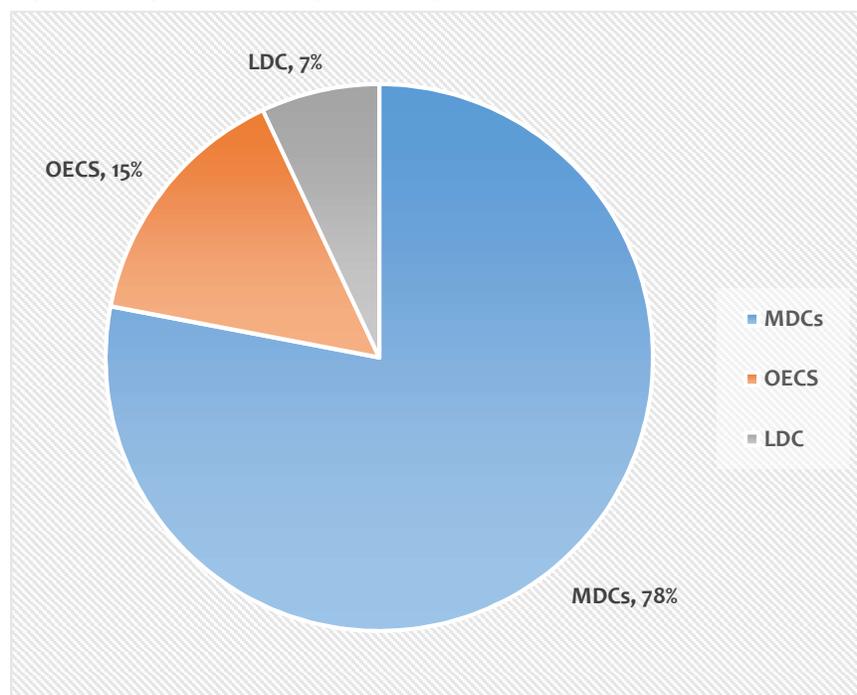
Source: Author's Illustration from CARICOM data

Table 1 - CARICOM's Total Trade Summary for the Period: 2016 to 2018

CARICOM's TOTAL TRADE SUMMARY			
	(US\$MN)		
	2016	2017	2018
Total Trade Exports	12,230	13,863	15,349
Total Trade Imports	21,273	20,491	24,646
Total Trade Balance	(9,043)	(6,628)	(9,297)
Total Agri. Trade Deficit as a % of Total Deficit	22%	23%	20%
Total Agri. Imports	3,557	3,623	3,792
Agri. Imports as a % of Total Imports	17%	18%	15%

Source: Author's Compilation from CARICOM data

Figure 2 - Regional Grouping Percentage Contribution to Overall Trade Deficit



Author's illustration from CARICOM data

CARICOM's More Developed Countries⁵ (MDCs) accounted for 78 percent of the overall trade deficit for the 2016-2018 period, whilst the Organisation of Eastern Caribbean States (OECS) Member States⁶ accounted for 15 percent. Belize's share was 7 percent.

Over the 2016 to 2018 period, Suriname recorded a trade surplus of approximately 1 percent in 2016 and 3 percent in 2017. Trinidad and Tobago achieved a trade surplus of 27 percent and 20 percent for 2017 and 2018, respectively.

Total Agriculture Trade:

Figure 3, which compares CARICOM to other selected Regional Trade Agreements (RTAs), provides a convenient entrée into the discussion of agriculture trade performance. The CARICOM internal market for agriculture accounted for 25% of total intra-regional trade, consistent with the performance of other developing country regional groupings.⁷ In the North American Free Trade Agreement (NAFTA), agriculture exports represent a little over 7.6% of the total value of exports

⁵ Barbados, Guyana, Jamaica and Suriname

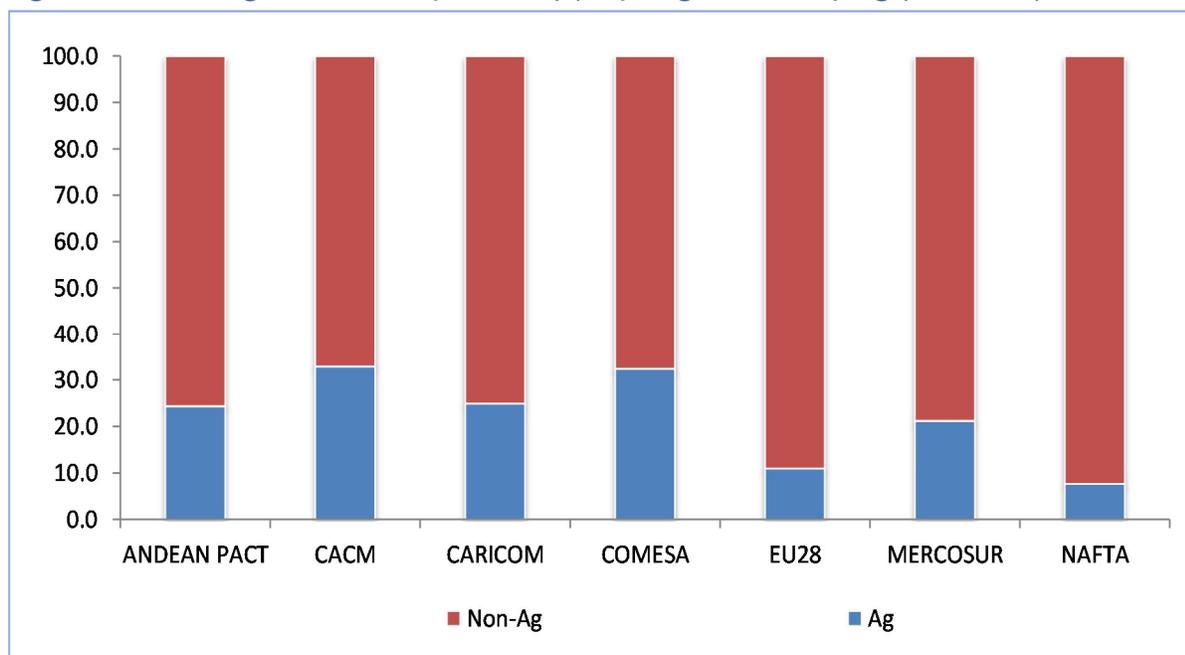
⁶ Excluding Dominica due to absence of export data

⁷ This metric refers to CARICOM agriculture exports divided by total exports of agriculture and non-agriculture products. This should not be confused with CARICOM intra-regional agriculture trade export share as a percentage of CARICOM total agriculture exports.

by NAFTA. In the European Union (EU-28) agriculture exports accounted for just over 11% of total exports by Members of the Grouping.

In the Southern Common Market (Mercosur) and the Central American Common Market (CACM), the value of agriculture exports measured nearly two-thirds the total value of non-agriculture exports. The Common Market for Eastern and Southern Africa (COMESA) Members’ agriculture exports of US \$17 billion was 32% of the exports of non-agriculture products. The Andean Pact Members’ exports of agriculture goods were 24% of the level recorded for non-agriculture exports. Evidently, the share of CARICOM’s intra-regional agriculture exports is broadly consistent with the performance of the other Developing Country Groupings examined, such as the CACM, COMESA and Mercosur.

Figure 3: Intra-Regional Trade by Sector (%), by Regional Grouping (2013-2015)



Source: Author’s Illustration from CARICOM data

Overall, intra-regional trade, as a share of CARICOM’s total exports for 2015, which stood at 11% was five percentage points below that recorded for 2006 at 16%, and 2% less than the 13% recorded for 2009. This decline may be reflective of the difficulties which the CARICOM Region continues to encounter with post-recession recovery but may also be reflective of a long-term declining trend in the level of production, competitiveness and/or exports of agriculture products⁸.

⁸This shift in trade performance requires a deeper analysis to ascertain causality, a task which is beyond the remit of the existing paper.

CARICOM’s total agriculture exports were 2.9 times the level of intra-regional exports. This compares with a multiple of ten times for the Andean Group and a multiple of seven times for COMESA. CACM Members exports to the world are five times the value of their intra-regional exports. Mercosur’s extra-regional exports are 13.5 times, the Group’s Members. Accordingly, CARICOM’s agriculture exports exhibit the lowest outward (extra-regional or global) orientation, which underscores the finding that CARICOM’s agriculture is least connected to Global Value Chains (GVCs) when compared to other developing country RTAs.

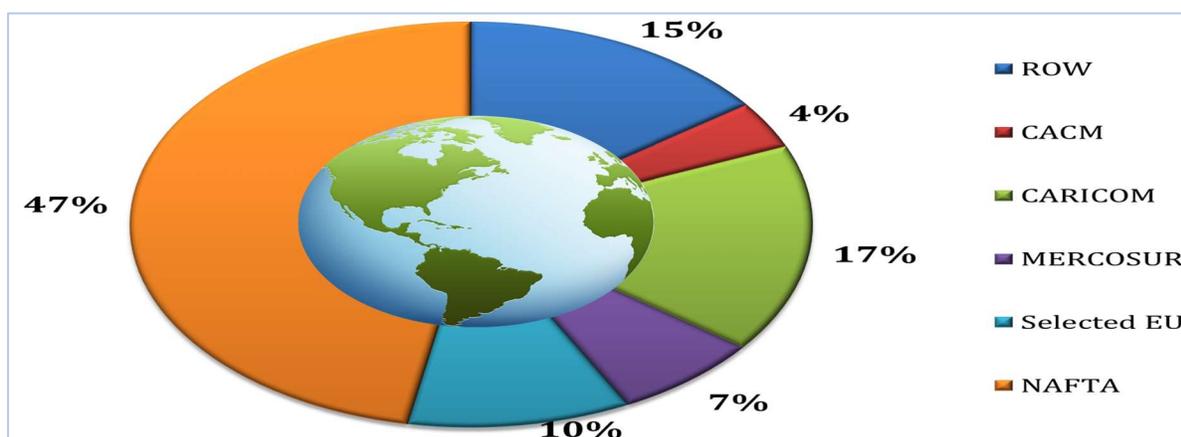
2.1.3 CARICOM Global Import Profile

- Agriculture Imports from Major Regional Grouping

CARICOM’s agriculture import share by major regional grouping is depicted in Figure 4. According to the trade analysis, NAFTA accounted for an average of 47% of CARICOM’s total agriculture imports over the 2013 – 2016 period. Imports from countries not captured in any of the Regional Groupings represented in the analysis are captured under an amalgam “Rest of the World (RoW)”, including China and India, which constitute 14.9% of total agriculture imports.

The CSME represents the second most significant source for CARICOM’s agriculture imports of approximately 17% of total agriculture imports, moderately greater than intra-regional imports of all products of 12.7%. The import share of the EU (EU- 24, as opposed to the EU-28) follows with just over 10% and Mercosur, led by Brazil, and the CACM close out the list of significant Regional Groupings.

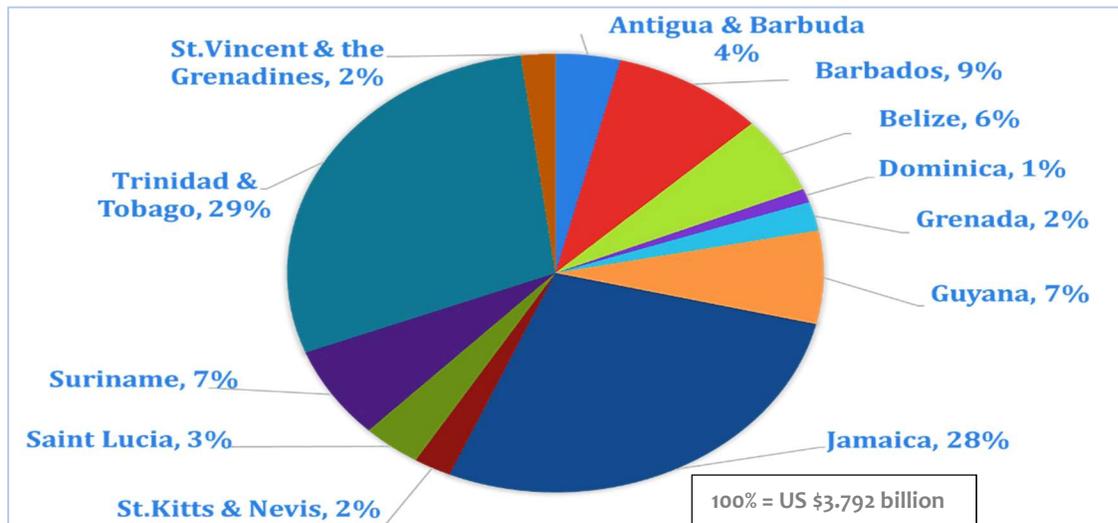
Figure 4: Composition of CARICOM Agriculture Imports by Regional Grouping (2013-2016)



Notes: 100% = US \$3.792 Billion; 2018 excludes data for Montserrat; 2018 data for Guyana and Trinidad & Tobago are preliminary.

Source: Author's Illustration from CARICOM data

Figure 5: CARICOM’s Extra-regional imports by Member State (2018)

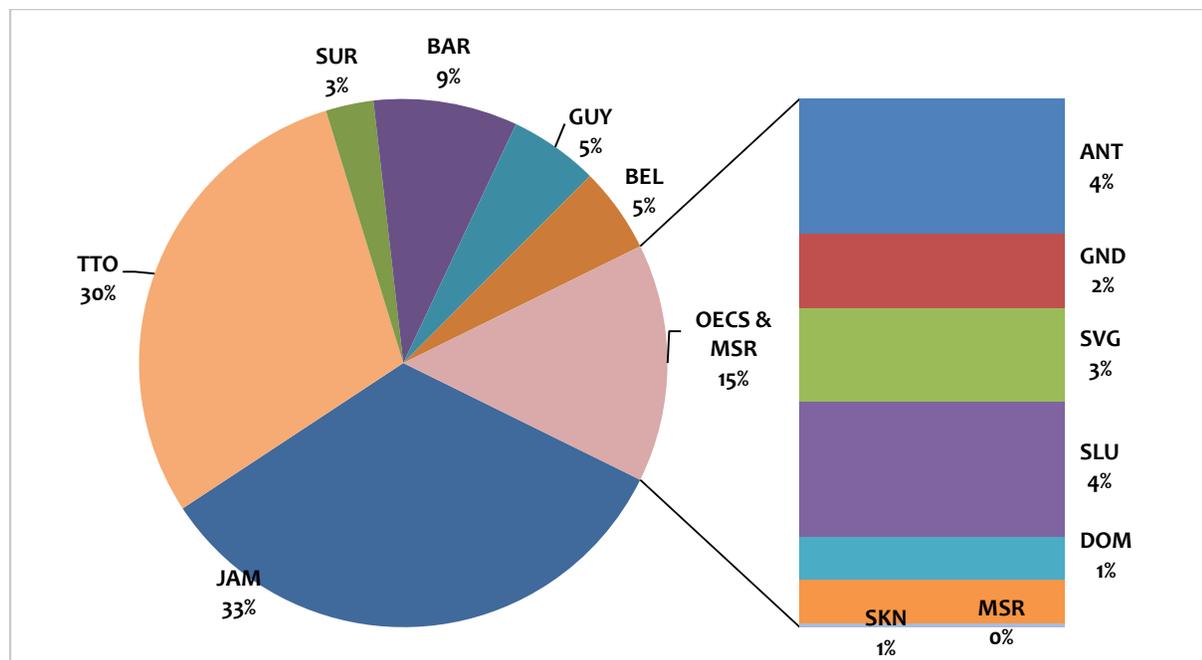


Source: Author's Illustration from CARICOM data

The share of CARICOM Member States' imports of agriculture products from NAFTA presented in Figure 6 is consistent with *a priori* expectations based on size, level of development, economic structure and geography (CARICOM location vis-à-vis the United States [US]). The data indicates that NAFTA, led by the US, accounted for more than 30% of the imports of individual CARICOM countries, except for Suriname, where it accounted for 19% of imports.

The magnitude of the trade flows between Trinidad and Tobago and NAFTA, and Jamaica and NAFTA, points to the existence of significant ‘trade architecture’ for imports. The strong orientation of the trading relationship between Barbados and NAFTA as a share of the Region’s total agriculture imports is also evident.

Figure 6: NAFTA Distribution of Imports to CARICOM Countries 2013-2015



Source: Author's Illustration from CARICOM data

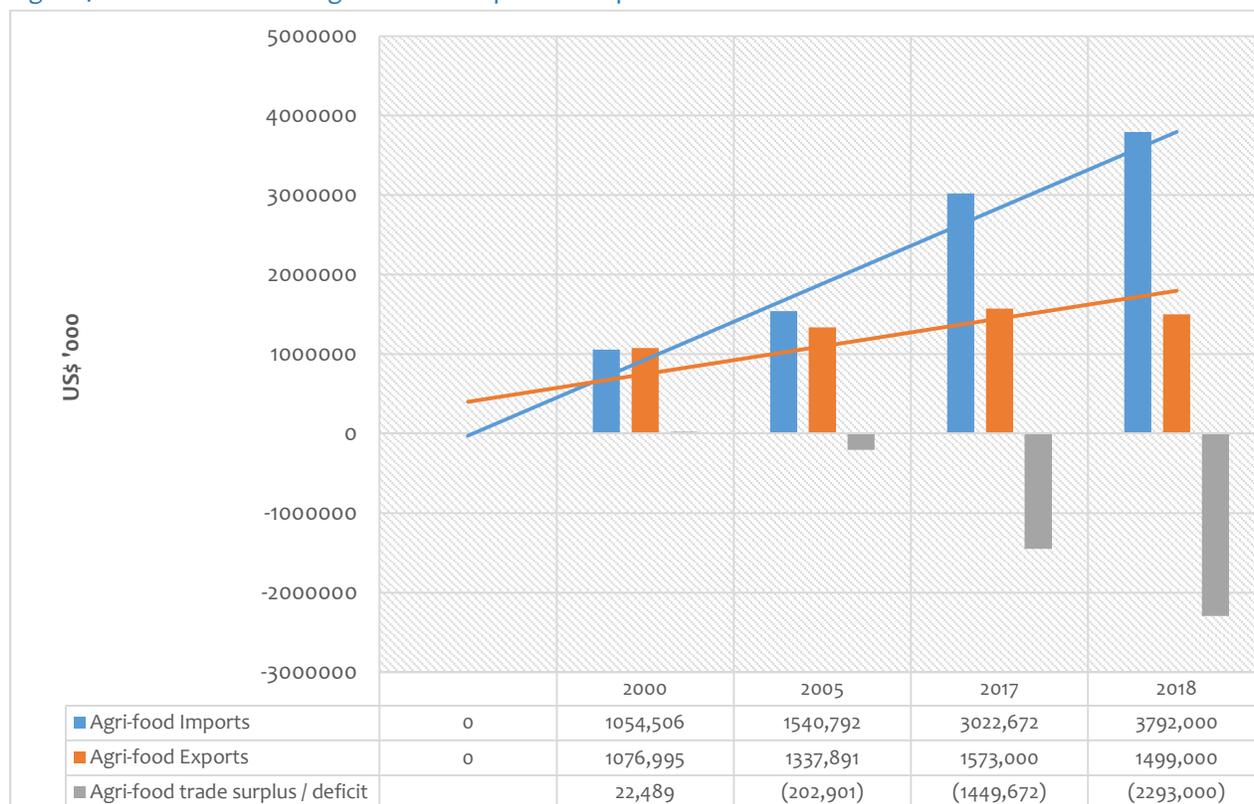
Within NAFTA, between 2013 and 2016, imports from the US into CARICOM accounted for over 40% of total imports of agriculture products in St. Vincent and the Grenadines, Trinidad and Tobago, Montserrat, Jamaica, Saint Lucia, Antigua and Barbuda, and Barbados.

Total Agriculture Trade:

Figure 7 compares CARICOM agri-food imports against its exports. In 2000, the CARICOM Region had an agri-food trade surplus of US \$20 million or 2%. Over the last eighteen years, the global agri-food landscape has undergone significant transformation, influenced by buyer concentration in the export markets, renegotiation of preferential trading agreements, developments relating to trade agreements and trade relationships, growth dividends accruing to global value chains, innovations and the introduction of new technologies which yield production and processing efficiencies, amongst others.

With agri-food imports of US \$3.7 billion (2018), the Region currently has an annual agri-food trade deficit of just above US \$2.2 billion. When the trade relating to beverages and spirits is excluded (Chapter 22 products) from the Region's agri-food exports, an even more acute scenario arises where the Region's small surplus of 2 percent earned in 2000 is eliminated and the trade balance plummets to a deficit of 23 percent. Over the period 2016-2018, agri-food products traded at an annual average deficit of US \$1.9 billion. See Annex 5.

Figure 7 - CARICOM Extra-Regional Food Imports vs Exports



Source: Author’s Illustration from CARICOM data

The trade data reveals that the top three (3) agriculture imports (*Food preparation n.e.c item 2106 ...*, *Meat and edible offal of fowl of species gallus...*, and *Sugars, sucrose, chemically pure...*) into CARICOM, when combined account for approximately 10 percent or US \$400 million in food imports. These imports to a large measure, among others, hold potential for increased Regional production and processing.

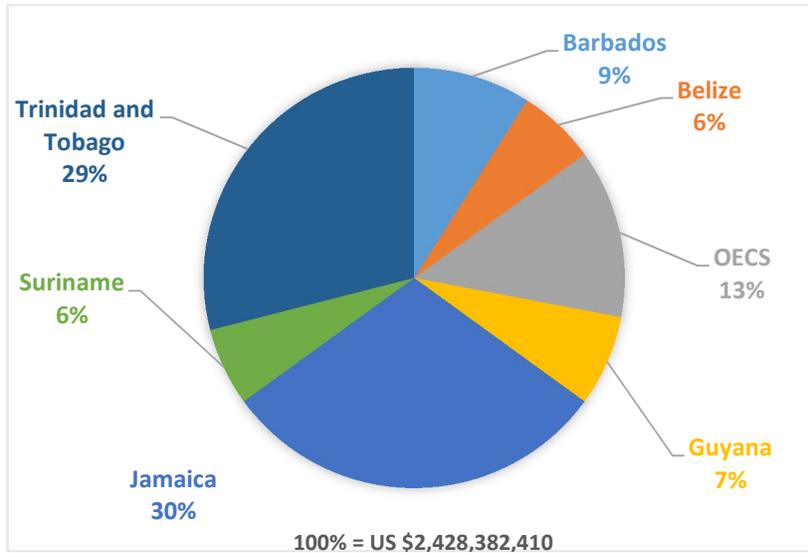
Agriculture Import Profile of Individual CARICOM Member States

A representation of agri-food imports for each CARICOM Member State over the period 2016-2018 is referenced at Figure 8 and Table 2.

CARICOM’s agri-food imports were dominated by Jamaica which represented US \$718 million or 30 percent of total CARICOM agri-food imports. Trinidad and Tobago was the second largest CARICOM agri-food importer, accounting for 29 percent or US \$711 million of the Region’s total agri-food imports. The OECS Member States collectively represented 13 percent of CARICOM’s total agriculture imports.

Annex 5 presents the top 10 imported Agri-food Products by each Member State.

Figure 8 - Distribution of CARICOM Food Imports Average (2016 – 2018)



Source: Author’s Compilation from CARICOM data

Table 2 Average Annual Value of Top 100 Agri - Products imported per Country

Total Agri Food Imports Average 2016: 2018 - top 100 products	
COUNTRIES	US\$
Antigua and Barbuda	81,824,475
Barbados	214,043,462
Belize	144,483,582
Dominica	19,813,552
Grenada	47,478,709
Guyana	169,882,254
Jamaica	718,395,954
Saint Lucia	82,491,661
St. Kitts and Nevis	47,146,417
St. Vincent and the Grenadines	55,014,388
Suriname	136,046,117
Trinidad and Tobago	711,761,839
Total	2,428,382,410

Source: CARICOM



TWENTY-FIVE BY 2025

ANNEX 4:

SHAPING EXPECTATIONS



ANNEX 4 SHAPING EXPECTATIONS

The CPSO offers a unique private instrumentality through which economic operators - micro, small and large - across the full spectrum of the private sector, inclusive of manufacturers, distributors, producers, transport and logistics firms, and tourism operators, can exchange ideas and reach consensus on practical steps to reduce the food import deficit.

While the agri-food deficit is undeniable, if not also unacceptable, proper context must take cognizance of the large and growing tourism sector, which increases the **effective** CARICOM population, at any given point in time, significantly beyond the indigenous population in many instances. On the one hand, this has a direct bearing on the precise meaning of "food security"; on the other hand, the expanded consumer base also raises additional market possibilities to supply 'agri-food' products.

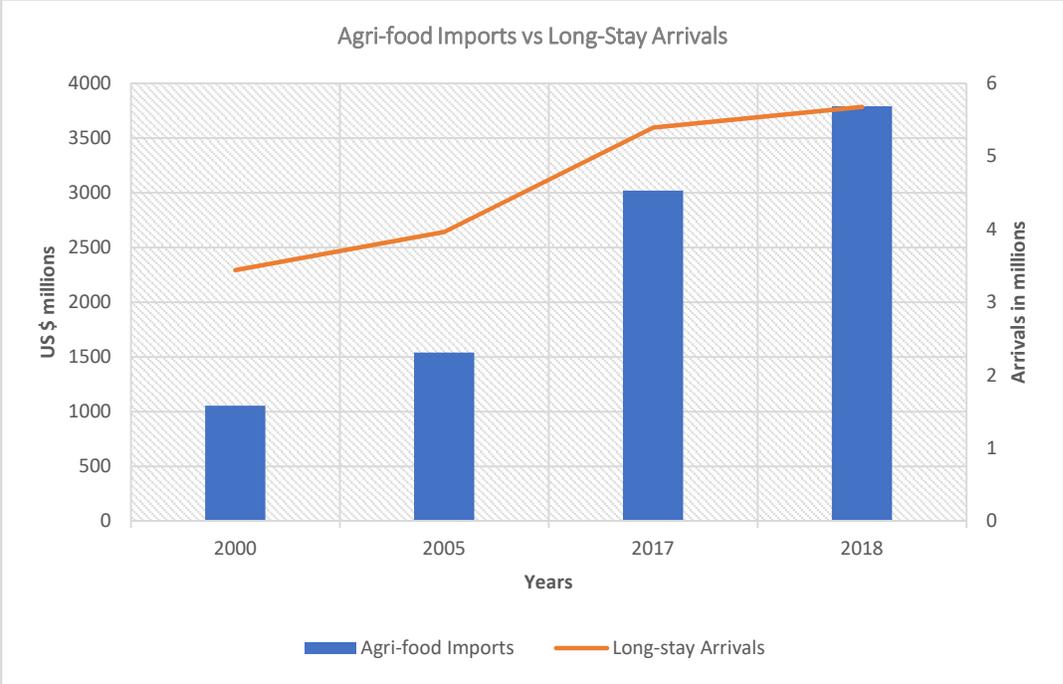
According to Figure 8, between 2000 and 2018, the Region experienced an increase in long-stay visitors of 63 percent, reaching 5.6 million visitors. The average length of stay of a visitor in the Region is 7 to 10 days, (except for Barbados and St. Vincent and the Grenadines, which recorded slightly higher numbers of 10.6 days and 13 days, respectively⁹). The increase in the number of long-stay visitor arrivals coincided with a 260 percent increase in the value of agri-food imports over the same period. Considered in light of the contraction in domestic production, the Region essentially has become more import dependent, especially when tourism growth is taken into account.

Supplanting food imports presently absorbed by the tourism sector with regionally sourced production is much more difficult than supplanting food imports destined for the domestic market, as expectations regarding high product quality and reliable service are far more rigorous than is the case of domestic markets.

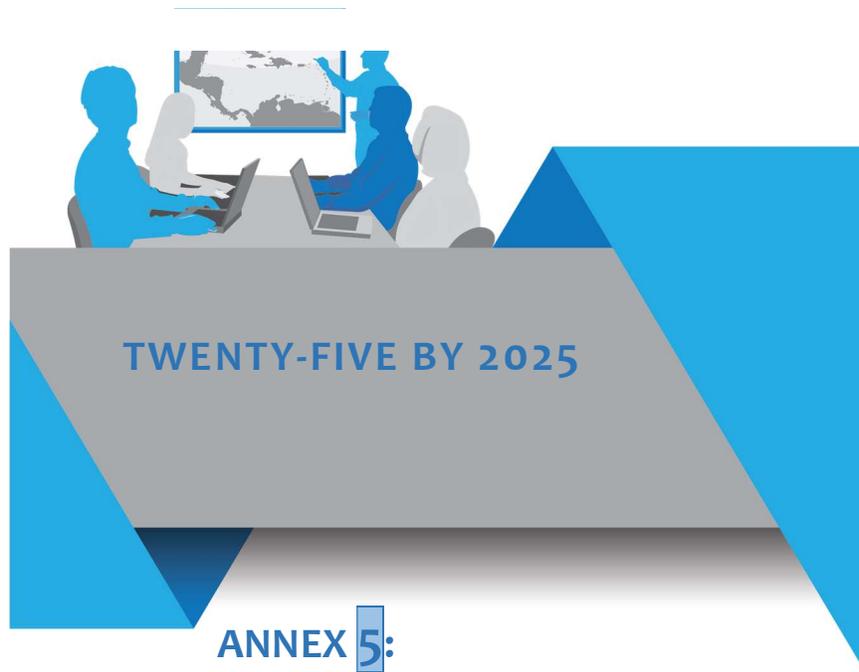
Having regard to the relative size and tendencies of the Region's domestic (supplier and consumer) and import markets, reducing the agri-food trade deficit may be constrained beyond certain limits, since increasingly, both CARICOM consumers and tourist visitors expect 'global agri-food product choices' to be accessible. Experts, however, buttressed by the evidence of success of certain niche investments, believe that the private sector, through increased domestic and regional investment in agri-food ventures, can do far more to harvest the gains in existing and emerging agri-food opportunities in the CSME, thereby reducing the overall trade deficit in food imports (in relative terms). Such is the rationale for this CPSO intervention.

⁹ The Caribbean Market Report, September 2019, Horwath HTL

Figure 9: Agri Food Imports vs Long Stay Arrivals



Given the position of most CARICOM economies, reducing agri-food imports will require a combination of opportunistic private sector investments that simultaneously brings a renewed focus to efficiency-based import displacement in the regional market as a whole, and urgently connects with global value chains through exports. The ‘business as usual’ investment patterns of the past have been inadequate and will now need to be augmented by a new wave of agri-food investments propelled by appropriate economic incentives.



TWENTY-FIVE BY 2025

ANNEX 5:

DATA FOR TRADE ANALYSIS


ANNEX 5: DATA FOR TRADE ANALYSIS
5.1 CARICOM'S Top Agricultural Imports from all Extra-Regional Sources

CARICOM's Top 100 Agricultural Imports from all Extra-Regional Sources by Reporting Member States				
Products	HS Chapters	VALUE US\$		%
		2016	2017	
Food preparations, n.e.c. in item no. 2106.10	210690	225,521,585	206,588,658	6.8%
Meat and edible offal, of fowls of the species Gallus domesticus, cuts and offal, frozen	020714	98,540,056	99,174,968	3.3%
Sugars, sucrose, chemically pure, in solid form, not containing added flavouring or colouring matter	170199	87,566,693	89,928,311	3.0%
Dairy produce, cheese (not grated, powdered or processed), n.e.c. in heading no. 0406	040690	72,563,619	82,936,247	2.7%
Oil-cake; other solid residues, whether/ground/ in form of pellets, resulting from the extraction of soya-bean oil	230400	90,104,492	69,568,720	2.3%
Dog/cat food, (not for retail sale), used in animal feeding	230990	59,055,287	62,554,371	2.1%
Cereals, maize (corn), other than seed	100590	64,037,817	61,256,110	2.0%
Wheat other than durum wheat, and meslin.	100190	62,471,394	59,633,490	2.0%
Durum wheat.	100110	55,144,098	49,868,692	1.6%
Cigarettes, containing tobacco	240220	52,292,426	48,267,044	1.6%
Sauces and preparations therefor, mixed condiments and mixed seasonings	210390	43,751,017	47,290,034	1.6%
Meat, of bovine animals, boneless cuts, frozen	020230	46,541,713	47,234,033	1.6%
Food preparations, of flour, meal, starch, malt extract or milk products, for infant use, put up for retail sale	190110	39,312,920	43,089,292	1.4%
Vegetable preparations, potatoes, prepared or preserved otherwise than by vinegar or acetic acid, frozen	200410	38,719,275	42,787,203	1.4%
Non-alcoholic beverages, n.e.c. in item no. 2202.10, not including fruit or vegetable juices of heading no. 2009	220290	39,344,816	41,475,229	1.4%
Hatching eggs	040700	46,455,748	38,466,150	1.3%
Dairy produce, milk and cream, concentrated or containing added sugar or other sweetening matter, in powder, granules or other solid forms, of a fat content not exceeding 1.5% (by weight)	040210	32,898,006	38,101,989	1.3%
Waters, including mineral and aerated, containing added sugar or other sweetening matter or flavoured	220210	44,154,381	37,906,378	1.3%
Food preparations, bakers' wares n.e.c. in heading no. 1605, whether or not containing cocoa, communion wafers, empty cachets suitable for pharmaceutical use, sealing wafers, rice papers and similar products	190590	35,783,527	37,148,940	1.2%
Vegetable oils, soya-bean oil and its fractions, crude, whether or not degummed, not chemically modified	150710	30,678,784	35,776,128	1.2%
Cereals, maize (corn), seed	100510	34,466,630	32,537,483	1.1%

Reducing CARICOM's Agri-Food Imports: Opportunities for CPSO Participation

CARICOM's Top 100 Agricultural Imports from all Extra-Regional Sources by Reporting Member States				
Products	HS Chapters	VALUE US\$		%
		2016	2017	
Vegetable oils, soya-bean oil and its fractions, other than crude, whether or not refined, but not chemically modified	150790	30,678,784	30,950,259	1.0%
Dairy produce, milk & cream, concentrated, not containing added sugar/other sweetening matter, in powder, granules or other solid forms, of a fat content exceeding 1.5% (by weight)	040221	28,477,771	29,513,139	1.0%
Vegetables, potatoes (other than seed), fresh or chilled	070190	28,238,982	28,475,577	0.9%
Undenatured ethyl alcohol, of an alcoholic strength by volume of 80% vol. or higher	220710	27,594,327	28,473,403	0.9%
Fish, dried, whether or not salted but not smoked, other than edible fish offal, other than cod (<i>Gadus morhua</i> , <i>Gadus ogac</i> , <i>Gadus macrocephalus</i>)	030559	26,410,859	28,198,279	0.9%
Fish prep., sardines, sardinella and brisling or sprats, prepared or preserved, whole or in pieces (but not minced)	160413	21,595,988	26,796,203	0.9%
Dog/cat food, put up for retail sale, used in animal feeding	230910	24,604,640	26,745,822	0.9%
Wine, still, in containers holding 2 litres or less	220421	25,512,687	26,245,386	0.9%
Sugar confectionery, (excluding chewing gum, including white chocolate), not containing cocoa	170490	23,693,298	25,158,583	0.8%
Ethyl alcohol and other spirits, denatured, of any strength	220720	22,785,646	25,147,212	0.8%
Food prep., sweet biscuits, whether or not containing cocoa	190531	24,215,006	24,924,072	0.8%
Food preparations, mixes and doughs for the preparation of bread, pastry, cakes, biscuits and other bakers' wares	190120	24,108,349	24,093,595	0.8%
Food preparations, obtained by the swelling or roasting of cereals or cereal products	190410	23,188,008	22,936,817	0.8%
Meat, of sheep (including lamb), cuts with bone in (excluding carcasses and half-carcasses), frozen	020442	14,010,981	21,372,628	0.7%
Vegetables, alliaceous, garlic, fresh or chilled	070320	22,233,188	20,732,530	0.7%
Vegetable oils, palm oil and its fractions, other than crude, whether or not refined, but not chemically modified	151190	15,299,411	20,493,839	0.7%
Whiskies	220830	28,200,443	20,472,625	0.7%
Soups and broths and preparations therefor	210410	17,993,383	19,691,283	0.7%
Meat prep, sausages, similar products, of meat, meat offal or blood, food preparations based on these products	160100	20,031,789	19,688,076	0.7%
Fish prep., tunas, skipjack and Atlantic bonito (<i>sarda</i> spp.), prepared or preserved, whole or in pieces (but not minced)	160414	14,932,733	19,453,627	0.6%
Spirits obtained by distilling grape wine or grape marc	220820	18,198,194	19,155,436	0.6%
Chocolate and other food preparations containing cocoa, n.e.c. in chapter 18	180690	16,918,090	18,966,588	0.6%

Reducing CARICOM's Agri-Food Imports: Opportunities for CPSO Participation

CARICOM's Top 100 Agricultural Imports from all Extra-Regional Sources by Reporting Member States				
Products	HS Chapters	VALUE US\$		%
		2016	2017	
Edible mixtures or preparations of animal or vegetable fats or oils or of fractions of different fats or oils of this chapter, other than edible fats or oils of heading no. 1516	151790	16,520,880	18,809,191	0.6%
Dairy produce, cheese, processed (not grated or powdered)	040630	15,955,467	18,054,748	0.6%
Beer, made from malt	220300	19,041,370	17,499,552	0.6%
Dairy produce, milk & cream, containing added sugar or other sweetening matter, other than in powder, granules or other solid forms	040299	15,403,818	17,268,214	0.6%
Food preparations, pasta, uncooked (excluding that containing eggs), not stuffed or otherwise prepared	190219	17,100,080	17,150,175	0.6%
Malt, not roasted	110710	17,668,384	16,920,781	0.6%
Fish preparations, mackerel, prepared or preserved, whole or in pieces (but not minced)	160415	18,737,807	16,851,693	0.6%
Ice cream/other edible ice, whether or not containing cocoa	210500	12,541,555	16,511,433	0.5%
Meat, of swine, n.e.c. in item no. 0203.2, frozen	020329	13,471,868	16,218,151	0.5%
Vegetable preparations, potatoes, prepared or preserved otherwise than by vinegar or acetic acid, not frozen	200520	18,074,234	16,082,315	0.5%
Food preparations, of flour, meal, starch, malt extract or milk products, for uses n.e.c. in heading no. 1901	190190	18,812,855	15,955,620	0.5%
Fruit, nuts and other edible parts of plants, prepared or preserved, whether or not containing added sugar, other sweetening matter or spirit, n.e.c. in heading no. 2008	200899	15,940,044	15,661,517	0.5%
Vegetable fats and oils and their fractions, partly or wholly hydrogenated, inter-esterified, re-esterified or elaidinised, whether or not refined, but not further prepared	151620	14,672,844	14,739,381	0.5%
Juices, mixtures of fruits or vegetables, unfermented, not containing added spirit, whether or not containing added sugar or other sweetening matter	200990	15,241,921	14,104,445	0.5%
Meat and edible offal, of turkeys, cuts and offal, frozen	020727	10,359,535	14,059,557	0.5%
Dairy produce, derived from milk, butter	040510	9,602,424	13,797,819	0.5%
Meat prep., of bovine animals, meat or meat offal, prep/ or preserved (excl. livers & homogenised preparations)	160250	22,494,023	13,476,078	0.4%
Soya beans	120100	14,223,812	13,221,461	0.4%
Offal, edible, of bovine animals, (other than tongues and livers), frozen	020629	14,829,902	13,111,211	0.4%
Fruit, edible, grapes, fresh	080610	13,622,493	13,099,279	0.4%
Dairy produce, yoghurt, whether or not concentrated or containing added sugar or other sweetening matter or flavoured or containing added fruit or cocoa	040310	13,852,688	12,960,067	0.4%
Crustacean prep.; shrimps and prawns, prepared or preserved	160520	10,598,783	12,937,780	0.4%
Meat, of goats, fresh, chilled or frozen	020450	10,103,008	12,784,955	0.4%

Reducing CARICOM's Agri-Food Imports: Opportunities for CPSO Participation

CARICOM's Top 100 Agricultural Imports from all Extra-Regional Sources by Reporting Member States				
Products	HS Chapters	VALUE US\$		%
		2016	2017	
Meat preparations, of the poultry of heading no. 0105, (i.e. of fowls of the species Gallus domesticus)	160232	12,251,653	12,475,862	0.4%
Dairy produce, milk and cream, concentrated, not containing added sugar or other sweetening matter, other than in powder, granules or other solid forms	040291	11,184,262	12,306,273	0.4%
Fruit, edible, apples, fresh	080810	13,475,829	12,276,619	0.4%
Meat, of swine, hams, shoulders and cuts thereof, with bone in, frozen	020322	9,487,365	12,035,244	0.4%
Vegetables, alliacious, onions, shallots, fresh or chilled	070310	14,199,019	11,873,019	0.4%
Flours and meals, of soya beans	120810	14,223,812	11,703,776	0.4%
Dairy produce, fresh cheese (including whey cheese), not fermented, and curd	040610	7,703,766	11,580,000	0.4%
Wine, sparkling	220410	10,765,577	11,295,848	0.4%
Vegetables, root, carrots and turnips, fresh or chilled	070610	11,229,280	11,264,316	0.4%
Vodka	220860	10,791,846	9,822,422	0.3%
Meat, salted in brine, dried or smoked, of swine, n.e.c. in item no. 0210.1	021019	11,525,196	9,806,495	0.3%
Cereals, husked (brown) rice	100620	9,827,212	9,329,927	0.3%
Food preparations, cereal or cereal products (excluding maize), in grain form, pre-cooked or otherwise prepared	190490	8,389,372	9,262,741	0.3%
Nuts and other seeds, whether or not containing added sugar, other sweetening matter or spirit (excluding ground-nuts except in mixtures)	200819	8,259,447	9,234,638	0.3%
Flour, meal and powder, of the products of chapter 8	110630	7,865,450	8,964,071	0.3%
Vegetables, leguminous, chickpeas (garbanzos), shelled, whether or not skinned or split, dried	071320	8,933,882	8,933,882	0.3%
Sugars, molasses, from sugar cane, resulting from the extraction or refining of sugar	170310	7,797,950	8,674,340	0.3%
Dairy produce, cheese of all kinds, grated or powdered	040620	8,537,045	8,537,045	0.3%
Wheat or meslin flour	110100	7,316,630	8,144,367	0.3%
Dairy produce, milk and cream, not concentrated, not containing added sugar or other sweetening matter, of a fat content, by weight, exceeding 1% but not exceeding 6%	040120	6,785,205	8,067,547	0.3%
Wine, still, in containers holding more than 2 litres	220429	9,246,990	7,948,151	0.3%
Cereal groats and meal, of maize (corn)	110313	7,028,525	7,726,486	0.3%
Nuts, ground-nuts, whether or not containing added sugar, other sweetening matter or spirit	200811	7,141,985	7,465,199	0.2%
Chocolate and other food preparations containing cocoa, in blocks, slabs or bars, filled, weighing 2kg or less	180631	6,122,119	7,370,015	0.2%
Sugars; cane sugar, raw, in solid form, not containing added flavouring or colouring matter	170111	6,706,419	6,772,278	0.2%
Liqueurs and cordials	220870	7,145,146	6,520,553	0.2%
Margarine, excluding liquid margarine	151710	5,950,678	6,248,402	0.2%

Reducing CARICOM's Agri-Food Imports: Opportunities for CPSO Participation

CARICOM's Top 100 Agricultural Imports from all Extra-Regional Sources by Reporting Member States				
Products	HS Chapters	VALUE US\$		%
		2016	2017	
Cereals, rice, semi-milled or wholly milled, whether or not polished or glazed	100630	4,908,479	5,833,102	0.2%
Sauces, tomato ketchup and other tomato sauces	210320	5,285,323	5,636,218	0.2%
Frozen Fish, n.e.c. in heading no. 0303 (excluding fillets, livers, roes and other fish meat of heading no. 0304)	030379	4,173,304	5,080,244	0.2%
Rum and other spirits obtained by distilling fermented sugar-cane products	220840	2,555,403	3,084,215	0.1%
Sugars, molasses, from sugar beet, resulting from the extraction or refining of sugar	170390	1,421,048	1,421,048	0.0%
Juice, orange, frozen, unfermented, (not containing added spirit), whether or not containing added sugar or other sweetening matter	200911	745,165	871,828	0.0%
Fish, frozen, salmonidae, n.e.c. in item no. 0303.1, excluding fillets, livers, roes/other fish meat of HS 0304	030319	266,370	266,370	0.0%
		2,954 million	3,022 million	

5.2 CARICOM'S Total Agricultural Trade Balance 2016-2018

Reducing CARICOM's Agri-Food Imports: Opportunities for CPSO Participation

CARICOM's total Agricultural Trade Balance (from all sources) by HS Chapters : 2016-2018					
COUNTRIES	HS Chapters	2016	2017	2018	Top 10 Import Ranking
Live animals.	01	(3.7)	(1.3)	(3.7)	
Meat and edible meat offal.	02	(259.7)	(280.6)	(295.5)	3
Fish and crustaceans, molluscs and other aquatic invertebrates.	03	(16.8)	38.8	26.7	
Dairy produce; birds' eggs; natural honey; edible products of animal origin, not elsewhere specified or included.	04	(287.6)	(312.0)	(347.9)	1
Products of animal origin, not elsewhere specified or included.	05	(1.6)	(1.7)	(1.6)	
Live trees and other plants; bulbs, roots and the like; cut flowers and ornamental foliage.	06	(6.6)	(6.5)	(6.4)	
Edible vegetables and certain roots and tubers.	07	(99.5)	(101.7)	(98.1)	10
Edible fruit and nuts; peel of citrus fruit or melons.	08	(12.2)	(2.9)	(10.8)	
Coffee, tea, mat, and spices.	09	12.0	6.5	(1.6)	
Cereals.	10	(112.7)	(82.0)	(147.1)	8
Products of the milling industry; malt; starches; inulin; wheat gluten.	11	(57.6)	(61.2)	(61.0)	
Oil seeds and oleaginous fruits; miscellaneous grains, seeds and fruit; industrial or medicinal plants; straw and fodder.	12	(42.3)	(47.4)	(54.6)	
Lac; gums, resins and other vegetable saps and extracts.	13	(3.7)	(3.1)	(4.0)	
Vegetable plaiting materials; vegetable products not elsewhere specified or included.	14	0.6	0.0	(0.0)	
Animal or vegetable fats and oils and their cleavage products; prepared edible fats; animal or vegetable waxes.	15	(122.0)	(163.4)	(161.1)	7
Preparations of meat, of fish or of crustaceans, molluscs or other aquatic invertebrates	16	(154.7)	(158.1)	(168.6)	6
Sugars and sugar confectionery.	17	5.7	(7.7)	(1.2)	
Cocoa and cocoa preparations.	18	(28.8)	(25.4)	(30.4)	
Preparations of cereals, flour, starch or milk; pastrycooks' products.	19	(171.9)	(175.2)	(176.3)	5
Preparations of vegetables, fruit, nuts or other parts of plants.	20	(123.3)	(135.3)	(137.9)	9
Miscellaneous edible preparations.	21	(290.9)	(278.8)	(334.0)	2
Beverages, spirits and vinegar.	22	(69.1)	(51.8)	(31.6)	
Residues and waste from the food industries; prepared animal fodder.	23	(175.0)	(158.8)	(185.4)	4
Tobacco and manufactured tobacco substitutes.	24	105.5	90.3	98.1	
Total Agricultural Trade balance		(1,916)	(1,919)	(2,134)	
Total CARICOM Imports (B)		21,273	20,491	24,646	
(A/B) %		(9.0)	(9.4)	(8.7)	

5.3 – Top 10 Imported Products by Member State

Jamaica

Jamaica			
Top 10 Agri imports description	HS Chapters	Value US\$	% share
Total		718,395,954	
Food preparations, n.e.c. in item no. 2106.10	210690	73,358,887	10.21%
Oil-cake and other solid residues, whether or not ground or in the form of pellets, resulting from the extraction of soya-bean oil	230400	45,254,897	6.30%
Sugars, sucrose, chemically pure, in solid form, not containing added flavouring or colouring matter	170199	40,139,817	5.59%
Vegetable oils, soya-bean oil and its fractions, crude, whether or not degummed, not chemically modified	150710	34,393,630	4.79%
Durum wheat.	100110	34,276,454	4.77%
Cereals, maize (corn), seed	100510	27,007,223	3.76%
Cereals, maize (corn), other than seed	100590	26,870,785	3.74%
Undenatured ethyl alcohol, of an alcoholic strength by volume of 80% vol. or higher	220710	25,696,223	3.58%
Ethyl alcohol and other spirits, denatured, of any strength	220720	24,712,736	3.44%
Dairy produce, cheese (not grated, powdered or processed), n.e.c. in heading no. 0406	040690	19,752,541	2.75%
source: Author's Compilation			

Trinidad and Tobago

Trinidad and Tobago			
Top 10 Agri imports description	HS Chapters	Value US\$	% share
Total		711,761,839	
Food preparations, n.e.c. in item no. 2106.10	210690	53,786,012	7.56%
Dairy produce, cheese (not grated, powdered or processed), n.e.c. in heading no. 0406	040690	38,430,198	5.40%
Dog or cat food, (not put up for retail sale), used in animal feeding	230990	34,664,426	4.87%
Wheat other than durum wheat, and meslin.	100190	28,418,740	3.99%
Sugars, sucrose, chemically pure, in solid form, not containing added flavouring or colouring matter	170199	23,297,821	3.27%
Hatching eggs	040700	19,582,712	2.75%
Vegetable oils, soya-bean oil and its fractions, other than crude, whether or not refined, but not chemically modified	150790	19,394,804	2.72%
Meat, of bovine animals, boneless cuts, frozen	020230	19,217,361	2.70%
Dairy produce, milk and cream, concentrated, not containing added sugar or other sweetening matter, in powder, granules or other solid forms, of a fat content exceeding 1.5% (by weight)	040221	18,467,013	2.59%
Cereals, maize (corn), other than seed	100590	17,206,458	2.42%
Source: Author's Compilation			

Barbados

Barbados			
Top 10 Agri imports description	HS Chapters	Value US\$	% share
Total		214,043,462	
Food preparations, n.e.c. in item no. 2106.10	210690	19,260,566	9.00%
Soya beans	120100	10,709,700	5.00%
Dairy produce, cheese (not grated, powdered or processed), n.e.c. in heading no. 0406	040690	9,233,501	4.31%
Meat, of bovine animals, boneless cuts, frozen	020230	9,195,048	4.30%
Wine, still, in containers holding 2 litres or less	220421	7,818,143	3.65%
Hatching eggs	040700	6,215,338	2.90%
Meat, of sheep (including lamb), cuts with bone in (excluding carcasses and half-carcasses), frozen	020442	5,920,760	2.77%
Fish preparations, tunas, skipjack and Atlantic bonito (sarda spp.), prepared or preserved, whole or in pieces (but not minced)	160414	5,920,300	2.77%
Cereals, maize (corn), other than seed	100590	5,837,724	2.73%
Sauces and preparations therefor, mixed condiments and mixed seasonings	210390	5,622,726	2.63%
Source: Author's Compilation			

Guyana

Guyana			
Top 10 Agri imports description	HS Chapters	Value US\$	% share
Total		169,882,254	
Dairy produce, milk and cream, concentrated or containing added sugar or other sweetening matter, in powder, granules or other solid forms, of a fat content not exceeding 1.5% (by weight)	040210	16,039,790	9.44%
Wheat other than durum wheat, and meslin.	100190	15,145,553	8.92%
Flours and meals, of soya beans	120810	11,435,850	6.73%
Hatching eggs	040700	9,157,850	5.39%
Waters, including mineral and aerated, containing added sugar or other sweetening matter or flavoured	220210	8,498,452	5.00%
Dairy produce, fresh cheese (including whey cheese), not fermented, and curd	040610	8,283,667	4.88%
Food preparations, of flour, meal, starch, malt extract or milk products, for infant use, put up for retail sale	190110	7,368,702	4.34%
Cereals, maize (corn), other than seed	100590	6,486,017	3.82%
Sugars, sucrose, chemically pure, in solid form, not containing added flavouring or colouring matter	170199	5,346,550	3.15%
Vegetable fats and oils and their fractions, partly or wholly hydrogenated, inter-esterified, re-esterified or elaidinised, whether or not refined, but not further prepared	151620	5,119,101	3.01%
Source: Author's Compilation			

Belize

Belize			
Top 10 Agri imports description	HS Chapters	Value US\$	% share
Total		144,483,582	
Cigarettes, containing tobacco	240220	40,032,216	27.71%
Food preparations, n.e.c. in item no. 2106.10	210690	10,306,137	7.13%
Dog or cat food, (not put up for retail sale), used in animal feeding	230990	7,126,169	4.93%
Soups and broths and preparations therefor	210410	5,502,571	3.81%
Durum wheat.	100110	5,451,264	3.77%
Sauces and preparations therefor, mixed condiments and mixed seasonings	210390	5,130,207	3.55%
Oil-cake and other solid residues, whether or not ground or in the form of pellets, resulting from the extraction of soya-bean oil	230400	5,097,529	3.53%
Edible mixtures or preparations of animal or vegetable fats or oils or of fractions of different fats or oils of this chapter, other than edible fats or oils of heading no. 1516	151790	4,937,453	3.42%
Dairy produce, cheese, processed (not grated or powdered)	040630	4,672,629	3.23%
Food preparations, obtained by the swelling or roasting of cereals or cereal products	190410	3,402,767	2.36%
Source: Author's Compilation			

Suriname

Suriname			
Top 10 Agri imports description	HS Chapters	Value US\$	% share
Total		136,046,117	
Food preparations, n.e.c. in item no. 2106.10	210690	16,419,648	12.07%
Meat and edible offal, of fowls of the species Gallus domesticus, cuts and offal, frozen	020714	14,062,924	10.34%
Sugars, sucrose, chemically pure, in solid form, not containing added flavouring or colouring matter	170199	11,010,626	8.09%
Vegetable oils, soya-bean oil and its fractions, other than crude, whether or not refined, but not chemically modified	150790	6,378,861	4.69%
Beer, made from malt	220300	5,909,884	4.34%
Durum wheat.	100110	3,724,948	2.74%
Vegetables, alliaceous, garlic, fresh or chilled	070320	3,705,615	2.72%
Fish preparations, sardines, sardinella and brisling or sprats, prepared or preserved, whole or in pieces (but not minced)	160413	3,649,423	2.68%
Oil-cake and other solid residues, whether or not ground or in the form of pellets, resulting from the extraction of soya-bean oil	230400	3,641,248	2.68%
Dog or cat food, (not put up for retail sale), used in animal feeding	230990	3,599,322	2.65%
Source: Author's Compilation			

Saint Lucia

Saint Lucia			
Top 10 Agri imports description	HS Chapters	Value US\$	% share
Total		82,491,661	
Meat and edible offal, of fowls of the species Gallus domesticus, cuts and offal, frozen	020714	11,029,679	13.37%
Food preparations, n.e.c. in item no. 2106.10	210690	4,840,169	5.87%
Meat, of bovine animals, boneless cuts, frozen	020230	3,882,958	4.71%
Dairy produce, milk and cream, concentrated, not containing added sugar or other sweetening matter, other than in powder, granules or other solid forms	040291	3,047,035	3.69%
Dairy produce, cheese, processed (not grated or powdered)	040630	2,931,260	3.55%
Fish preparations, tunas, skipjack and Atlantic bonito (sarda spp.), prepared or preserved, whole or in pieces (but not minced)	160414	2,847,060	3.45%
Wine, still, in containers holding 2 litres or less	220421	2,119,713	2.57%
Food preparations, bakers' wares n.e.c. in heading no. 1605, whether or not containing cocoa, communion wafers, empty cachets suitable for pharmaceutical use, sealing wafers, rice papers and similar products	190590	1,748,183	2.12%
Sugars, sucrose, chemically pure, in solid form, not containing added flavouring or colouring matter	170199	1,740,931	2.11%
Vegetables, potatoes (other than seed), fresh or chilled	070190	1,731,545	2.10%
Source: Author's Compilation			

Antigua and Barbuda

Antigua and Barbuda			
Top 10 Agri imports description	HS Chapters	Value US\$	% share
Total		81,824,475	
Meat and edible offal, of fowls of the species Gallus domesticus, cuts and offal, frozen	020714	10,986,979	13.43%
Food preparations, n.e.c. in item no. 2106.10	210690	7,926,422	9.69%
Waters, including mineral and aerated, containing added sugar or other sweetening matter or flavoured	220210	4,225,251	5.16%
Sauces and preparations therefor, mixed condiments and mixed seasonings	210390	2,508,640	3.07%
Wine, still, in containers holding more than 2 litres	220429	2,359,356	2.88%
Food preparations, bakers' wares n.e.c. in heading no. 1605, whether or not containing cocoa, communion wafers, empty cachets suitable for pharmaceutical use, sealing wafers, rice papers and similar products	190590	2,208,616	2.70%
Whiskies	220830	2,185,602	2.67%
Meat preparations, sausages and similar products, of meat, meat offal or blood, and food preparations based on these products	160100	2,073,302	2.53%
Dog or cat food, put up for retail sale, used in animal feeding	230910	2,033,713	2.49%
Non-alcoholic beverages, n.e.c. in item no. 2202.10, not including fruit or vegetable juices of heading no. 2009	220290	1,661,719	2.03%
Source: Author's Compilation			

St. Vincent and the Grenadines

St. Vincent and the Grenadines			
Top 10 Agri imports description	HS Chapters	Value US\$	% share
Total		55,014,388	
Meat and edible offal, of fowls of the species Gallus domesticus, cuts and offal, frozen	020714	9,234,203	16.79%
Wheat other than durum wheat, and meslin.	100190	8,386,504	15.24%
Food preparations, n.e.c. in item no. 2106.10	210690	4,794,899	8.72%
Meat and edible offal, of turkeys, cuts and offal, frozen	020727	1,788,097	3.25%
Cereals, maize (corn), other than seed	100590	1,728,014	3.14%
Dairy produce, cheese (not grated, powdered or processed), n.e.c. in heading no. 0406	040690	1,665,429	3.03%
Dairy produce, milk and cream, concentrated or containing added sugar or other sweetening matter, in powder, granules or other solid forms, of a fat content not exceeding 1.5% (by weight)	040210	1,562,801	2.84%
Meat preparations, sausages and similar products, of meat, meat offal or blood, and food preparations based on these products	160100	1,273,912	2.32%
Dairy produce, milk and cream, concentrated, not containing added sugar or other sweetening matter, other than in powder, granules or other solid forms	040291	1,213,361	2.21%
Wine, still, in containers holding more than 2 litres	220429	1,118,645	2.03%
Source: Author's Compilation			

Grenada

Grenada			
Top 10 Agri imports description	HS Chapters	Value US\$	% share
Total		47,478,709	
Meat and edible offal, of fowls of the species Gallus domesticus, cuts and offal, frozen	020714	9,222,874	19.43%
Food preparations, n.e.c. in item no. 2106.10	210690	4,533,176	9.55%
Dairy produce, cheese (not grated, powdered or processed), n.e.c. in heading no. 0406	040690	3,072,449	6.47%
Non-alcoholic beverages, n.e.c. in item no. 2202.10, not including fruit or vegetable juices of heading no. 2009	220290	2,298,836	4.84%
Dairy produce, milk and cream, containing added sugar or other sweetening matter, other than in powder, granules or other solid forms	040299	1,837,921	3.87%
Dairy produce, milk and cream, concentrated or containing added sugar or other sweetening matter, in powder, granules or other solid forms, of a fat content not exceeding 1.5% (by weight)	040210	1,324,946	2.79%
Meat and edible offal, of turkeys, cuts and offal, frozen	020727	1,273,798	2.68%
Food preparations, bakers' wares n.e.c. in heading no. 1605, whether or not containing cocoa, communion wafers, empty cachets suitable for pharmaceutical use, sealing wafers, rice papers and similar products	190590	1,234,965	2.60%
Meat preparations, sausages and similar products, of meat, meat offal or blood, and food preparations based on these products	160100	1,055,103	2.22%
Sauces and preparations therefor, mixed condiments and mixed seasonings	210390	976,116	2.06%
Source: Author's Compilation			

St. Kitts and Nevis

St. Kitts and Nevis			
Top 10 Agri imports description	HS Chapters	Value US\$	% share
Total		47,146,417	
Meat and edible offal, of fowls of the species Gallus domesticus, cuts and offal, frozen	020714	5,514,202	11.70%
Food preparations, n.e.c. in item no. 2106.10	210690	4,686,466	9.94%
Non-alcoholic beverages, n.e.c. in item no. 2202.10, not including fruit or vegetable juices of heading no. 2009	220290	1,977,185	4.19%
Dairy produce, cheese (not grated, powdered or processed), n.e.c. in heading no. 0406	040690	1,817,064	3.85%
Food preparations, obtained by the swelling or roasting of cereals or cereal products	190410	1,630,608	3.46%
Sauces and preparations therefor, mixed condiments and mixed seasonings	210390	1,576,102	3.34%
Food preparations, bakers' wares n.e.c. in heading no. 1605, whether or not containing cocoa, communion wafers, empty cachets suitable for pharmaceutical use, sealing wafers, rice papers and similar products	190590	1,335,230	2.83%
Dog or cat food, (not put up for retail sale), used in animal feeding	230990	1,183,726	2.51%
Fish, dried, whether or not salted but not smoked, other than edible fish offal, other than cod (Gadus morhua, Gadus ogac, Gadus macrocephalus)	030559	1,165,772	2.47%
Wine, still, in containers holding more than 2 litres	220429	1,113,714	2.36%
Source: Author's Compilation			

Dominica

Dominica			
Top 10 Agri imports description	HS Chapters	Value US\$	% share
Total		19,813,552	
Meat and edible offal, of fowls of the species Gallus domesticus, cuts and offal, frozen	020714	4,178,236	21.09%
Food preparations, n.e.c. in item no. 2106.10	210690	1,657,022	8.36%
Dairy produce, cheese (not grated, powdered or processed), n.e.c. in heading no. 0406	040690	934,794	4.72%
Dairy produce, milk and cream, concentrated or containing added sugar or other sweetening matter, in powder, granules or other solid forms, of a fat content not exceeding 1.5% (by weight)	040210	928,089	4.68%
Non-alcoholic beverages, n.e.c. in item no. 2202.10, not including fruit or vegetable juices of heading no. 2009	220290	711,896	3.59%
Meat preparations, sausages and similar products, of meat, meat offal or blood, and food preparations based on these products	160100	705,314	3.56%
Sugars; cane sugar, raw, in solid form, not containing added flavouring or colouring matter	170111	654,710	3.30%
Sauces and preparations therefor, mixed condiments and mixed seasonings	210390	473,102	2.39%
Meat and edible offal, of turkeys, cuts and offal, frozen	020727	364,550	1.84%
Fish preparations, sardines, sardinella and brisling or sprats, prepared or preserved, whole or in pieces (but not minced)	160413	354,542	1.79%
Source: Author's Compilation			