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Caribbean Environment for U.S. Agricultural Exports

Report Categories:

Agricultural Situation

Agriculture in the Economy

Market Development Reports

Market Promotion/Competition

Promotion Opportunities

Exporter Guide

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Report Highlights:

Despite slow growth economic conditions, the Caribbean continues to gobble up U.S. agricultural products at record levels (\$1.4 billion in 2012). This report outlines the political, economic, agricultural policy, trade, and SPS regulatory environment faced by U.S. agricultural suppliers in this vast and fragmented region.

General Information:

General Political Situation and Trends:

The Caribbean is one of the most fragmented and diverse regions in the world. This vast geographic area is covered by two regional FAS offices, the Office of Agricultural Affairs (OAA) in Santo Domingo and the Caribbean Basin Agricultural Trade Office (CBATO) in Miami. The OAA in Santo Domingo covers the Dominican Republic, Jamaica and Haiti. The CBATO covers practically all other island markets. Specifically, CBATO islands of coverage include: Anguilla, Antigua and Barbuda, Aruba, The Bahamas, Barbados, Bermuda, British Virgin Islands, Caribbean Netherlands or BES Islands (Bonaire, Sint Eustatius and Saba), Cayman Islands, Curaçao, Dominica, Grenada, Guadeloupe, Martinique, Montserrat, Saint Barthélemy, Saint Kitts and Nevis, Saint Lucia, Saint Martin, Saint Vincent and the Grenadines, Sint Maarten, Trinidad and Tobago, and Turks and Caicos Islands.

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Politically speaking, the CBATO's region of coverage is a mix of independent states, overseas departments or dependencies of European countries, and islands that are part of a European kingdom. Practically all of the islands have some sort of democratic parliamentary system or internal self-government, and they maintain political, economic and cultural ties with Europe of varying degrees of closeness.

Countries in the region also have generally good relations, including close commercial and social ties, with the United States. In islands where there is a high dependence on U.S. tourism as the principal source of income (e.g., The Bahamas, Bermuda, Cayman Islands, Aruba, and Turks and Caicos) this is more evident than in those that retain close ties with Europe, particularly in the French Antilles. Canada has close relations with its many Commonwealth partners in the region. Cuba, the largest and most populated country in the region, maintains diplomatic relations with most of its Caribbean neighbors.

Within our region there are several political and economic alliances. The most notable are:

The Caribbean Community (CARICOM) is made up of 15 Member States and five associate members. It comprises most CBATO islands of coverage as well as Belize, Guyana, Haiti, Jamaica and Suriname. Upon obtaining their new autonomous country status, in 2011 Sint Maarten and Curacao expressed interest in joining CARICOM as Associate Members. In February 2012 CARICOM set up a working group to study matters pertaining to associate membership, including that of Curaçao and Sint Maarten. CARICOM's Single Market and Economy (CSME) provides for free intra-regional movement of goods and a 40 percent common external tariff (CET) for extra-regional goods, among other things.

The Organization of Eastern Caribbean States (OECS) is made up of nine small, mostly developing nations in its region. In January 2011, the OECS' Economic Union entered into force, creating a single financial and economic space among six OECS countries. Many elements of the OECS Economic Union were already in place under CARICOM's CSME. All OECS countries, with the exception of the British Virgin Islands, use a single currency, the Eastern Caribbean Dollar, the existence of which predates the creation of the Economic Union. The exchange rate with the U.S. Dollar is fixed (US\$1.00 = EC\$2.70). As a practical matter, trade in goods between OECS countries is very low.

The Caribbean Forum of African, Caribbean, and Pacific States (CARIFORUM) is made up of 16 Caribbean countries, all former colonies of European countries. They are: the CARICOM countries (with the exception of Montserrat), Cuba and the Dominican Republic. The 2008 European Union (EU)-CARIFORUM Economic Partnership Agreement (EPA) helps to bind this group together. (Cuba is the only CARIFORUM country which is not part of the EPA with the EU.) In 2011 a joint Caribbean-EU Strategy was developed, which aimed at laying the groundwork for a more mature relationship encompassing political dialogue and development cooperation over a five-year period which began in 2012. More recently, however, CARIFORUM countries have expressed publicly their concern at the implications of EU development policy decisions in 2012 that will direct assistance move toward lower income countries and reduce aid for middle income countries, such as the majority of the Caribbean countries.

Venezuela's prominence in the Caribbean Basin has risen over the past five years. Dominica, Antigua and Barbuda, and Saint Vincent and the Grenadines are members of the Venezuela-led Bolivarian Alliance for the Peoples of Our America (ALBA). St. Lucia and Suriname, which were guests at the February 2012 ALBA meeting in Caracas, have expressed interest in becoming full members. ALBA has provided considerable economic assistance to its Caribbean members in areas such as infrastructure, agriculture, and education (including scholarships for study in Cuba). Many Caribbean countries, including the ALBA members and The Bahamas, Grenada, Saint Kitts and Nevis, and Saint Lucia, are also part of PetroCaribe, an alliance with Venezuela that allows signatory countries to purchase oil from the South American country at preferential terms (up-front payment of 50 to 60 percent of the cost of the petroleum shipment and low interest 25-year terms to pay the balance).

See Appendix IV for a listing of CBATO island representation in selected international organizations.

Macroeconomic Situation and Trends:

According to the UN's Economic Commission for Latin America and the Caribbean (ECLAC), real GDP for the English and Dutch-speaking Caribbean (which makes up most of the CBATO's region of coverage) grew by 1.1 percent in 2012, following 0.4 percent growth in 2011. The economic situation in the United States and Europe has dampened demand for goods and services from the Caribbean. This is especially troubling for the tourism sector, the economic engine of most Caribbean economies, which

draws roughly 50 percent of its visitors from the United States and 20 percent from Europe. While tourist arrivals to the region continue to inch upward, , Caribbean Tourism Organization data show aggregate spending by visitors is just now catching up to levels prior to the global crisis in 2008-09. This has kept the sector's revenues (and thus economic growth) in check.

A second factor affecting the recovery is the high debt burden that many Caribbean islands face, which according to the IMF by the close of 2012 was projected to average nearly 95 percent of GDP for the tourism-dependent countries of the region. This represents a 15 percent swelling of public debt since the 2008-09 global financial crisis. Saint Kitts & Nevis and Grenada have debt-to-GDP ratios in excess of 100 percent, while several others in the CBATO region have ratios between 50 and 100 percent. These countries are trying to address the problem through a combination of revenue-raising and expenditure-cutting measures, as they face pressure from the IMF and credit rating agencies. In 2012 Barbados saw its credit rating downgraded by both Standard & Poor's and Moody's Investors Services. Also in 2012, Moody's downgraded The Bahamas and Saint Vincent and the Grenadines, while Standard & Poor's downgraded Bermuda.

In addition, the health of the region's financial sector has suffered due to the aftermath of the collapse of insurance and banking entities in recent years. According to the IMF, bank non-performing loans are also on the ascent.

Given these circumstances, economic performance for the region is expected to improve only marginally in 2013, with IMF and ECLAC real GDP growth projections ranging from 1.4 to 2.0 percent, respectively. However, an economic slowdown in the United States or a deepening of the recession in Europe could cut demand for Caribbean products and services (including tourism), curtail remittances, and exacerbate the already heavy public debt situation. The future of PetroCaribe in a post-Chavez Venezuela may also be a source of uncertainty for participating islands.

Agriculture in the Economy:

The total land area of the CBATO islands is 23,783 square kilometers (9,183 square miles), roughly the size of New Hampshire. Only about seven percent of this land is arable and an even smaller percentage is actually utilized for farming. Other challenges include: scant water resources in some islands; few economies of scale; labor shortfalls due to poor returns or wages compared to the services sector; disease and pest issues; inadequate post harvest handling and cold chain facilities; and hurricanes ripping through the region every year.

Due to these many constraints, agriculture's contribution to GDP ranges from 1 percent or less in Aruba, Bermuda, British Virgin Islands, Cayman Islands, Curaçao, Saint Martin, Sint Maarten, Trinidad and Tobago, and Turks and Caicos Islands to 13.2 percent in Dominica. In most other islands, agriculture's contribution to GDP is between one and five percent. Commercial farming is concentrated

in bananas and sugarcane. However, deterioration of preferential market access to the EU has negatively impacted production of these crops in islands such as Dominica, Grenada, Saint Lucia, Saint Kitts & Nevis, and Saint Vincent and the Grenadines. Many of the islands produce tropical fruits, vegetables, root crops, coconuts, and spices. A few islands also produce dairy, poultry, pigs, goats, and sheep. See Appendix II for agricultural statistics by island.

Domestic Agricultural Policy Overview:

While most Caribbean governments devote some resources and efforts toward agriculture and rural development, budget and staff limitations generally constrain large-scale or long-term focus on the sector. Many islands have small extension programs. In the case of local produce, several islands have seasonal price supports, short-lived seasonal import bans on selected items, and/or quasi-government organizations which operate retail outlets aimed at helping farmers market their production and obtain “fair” prices. Governments are expressing greater interest in agriculture, however, driven since the late 2000s by food security concerns (see the Food Security section for more) and the desire to reduce food import bills.

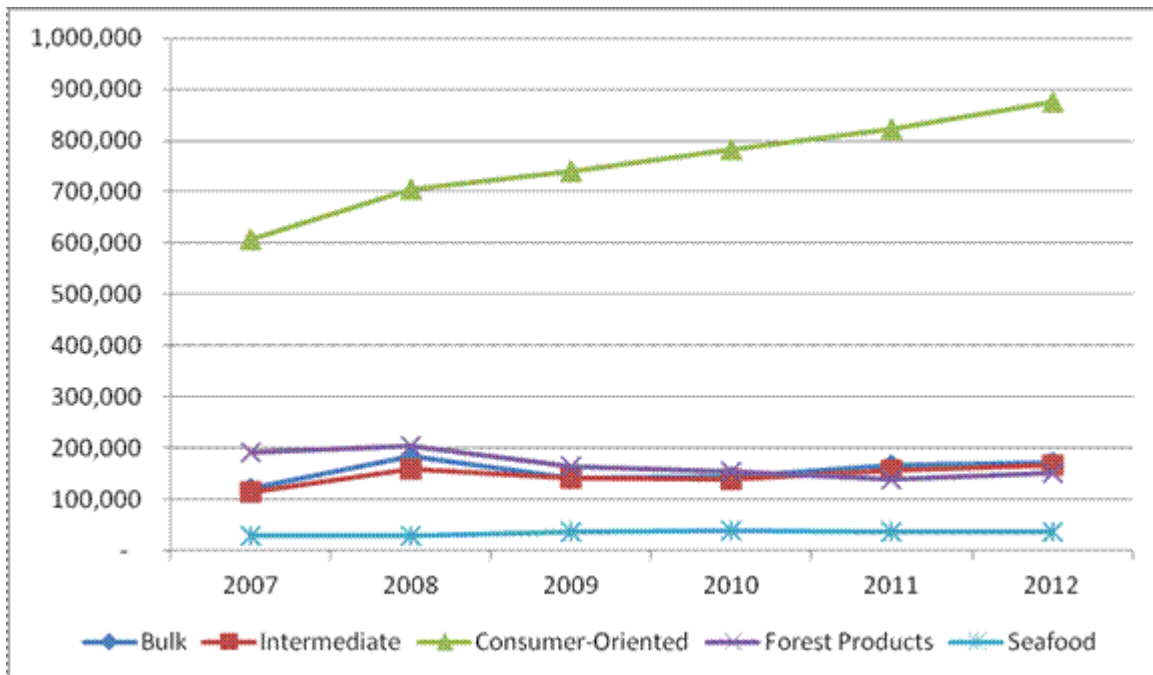
Trinidad and Tobago is perhaps the country which has been most active in this regard. In March 2012, the Government of Trinidad and Tobago (GOTT) unveiled an ambitious plan to expand its agricultural sector and cut the country’s estimated \$700 million food import bill in half by 2015. The National Food Production Action Plan 2012-2015 focuses on boosting production of basic staples, vegetables, fruits and livestock, as well as developing the aquaculture sector. The size of the Action Plan’s budget is not known and its impact remains to be seen. Reportedly, the GOTT is also exploring collaboration with the Government of Guyana (GOG) to facilitate an arrangement that would see Trinbagonian businesses investing in farming in Guyana, namely in rice. The idea of Guyana capitalizing on its farming resources (ample land and water) to boost its food production and help ameliorate the region’s food security situation is not a new one. The Jagdeo Initiative, a plan originally proposed in 2003 by the former Guyanese President, Bharrat Jagdeo, called (among other things) for the establishment of “megafarms” in Guyana that could supply neighboring Caribbean countries with rice and other crops. GOTT and GOG recent efforts, if successful, would be a step in this direction.

A United Nations Environment Programme/Global Environment Facility (UNEP/GEF) four-year, \$13 million Regional Project for Implementing National Biosafety Frameworks (NBFs) in the Caribbean formally got underway in 2012. The project aims to assist 12 CARICOM countries (nine of which are part of the CBATO’s region of coverage) to comply with their obligations under the Cartagena Protocol on Biosafety (CPB). This project may result in the implementation of new regulations affecting trade in biotech products.

Agricultural Trade Environment:

In terms of agricultural products, the United States posted a \$1.3 billion positive trade balance with the CBATO islands in 2012. The United States imported \$116 million in agricultural, fish and forestry products from the region, with seafood from The Bahamas and Trinidad and Tobago accounting for the lion's share (over two-thirds) of these imports. By contrast, the United States exported a record-high \$1.4 billion in agricultural, fish, and forestry products to the region (see Appendix III), up 5.7 percent from 2011. Consumer-oriented products alone, which account for over 60 percent of these exports, set a new high of \$874 million in the process. The top five export markets within our region are Trinidad & Tobago, The Bahamas, Barbados, Bermuda, and Aruba. Top export products are poultry meat, red meats (fresh, chilled & frozen), snack foods, dairy products, and wheat. Overall U.S. market share is estimated at 55 percent, ranging from single digits in the French Antilles to as much as 95 percent in The Bahamas.

U.S. Agricultural Exports to the Caribbean Basin
(U.S. Dollars)



Source: Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics

As the data demonstrate, the CBATO's region of coverage is quite open and receptive to agricultural imports from the United States. Practically all the CBATO's islands of coverage are WTO and Codex members, or are represented in these organizations by way of being overseas territories of either the U.K. or France. A WTO Working Party has been established to consider The Bahamas' request to accede to the body. The current government has announced its intent to complete its accession by the end of 2014. See Appendix IV for a listing of CBATO Island Representation in Selected International Organizations.

The Economic Partnership Agreement with the European Union is scheduled over the next 25 years to gradually reduce Caribbean tariffs to zero for a large share of agricultural goods from the EU. The CARIFORUM countries first and second rounds of EPA tariff reductions were scheduled for January 1, 2011 and January 1, 2013, respectively. Media reports, however, indicate that implementation of these cuts has been uneven.

CARICOM is a party to trade agreements with Colombia, Cuba, Costa Rica, the Dominican Republic, and Venezuela. In addition, CARICOM is negotiating a free trade agreement with Canada. So far the two sides have concluded four rounds of negotiations, with an aim at having an agreement in place by the end of 2013. In 2011 Canada exported \$130.8 million in agricultural products to CARICOM-member countries. Canada's major exports to the region include wheat, fresh/frozen pork and other meat products, pulses, potatoes and French fries, flour, malt, and dairy products.

In the medium term, China, India, Argentina and Chile are other countries with the potential to become significant trading competitors in the Caribbean. The expansion of the Panama Canal, which is expected to conclude by 2014, bears watching. Larger, post-Panamax vessels from Asia transiting through the canal could possibly find it advantageous to make a strategic stop at a Caribbean port or a southern U.S. port, from which Asian products could be distributed to the rest of the Caribbean. Whether international distribution channels in the Caribbean Basin will be affected by the Panama Canal expansion remains to be seen.

Sanitary and Phytosanitary (SPS) Issues and Regulatory Systems:

Sanitary product registration, laboratory testing, special certification, and pre-market approval are not required to import the vast majority of foodstuffs into most islands. For products that do require import approval or certification (mainly meat and poultry, dairy, seafood, and produce), most countries try to follow international standards and guidelines. U.S. labels are generally accepted without a problem, although occasionally U.S. exporters run into problems with local authorities over U.S. products not fully complying with country of origin and expiration date requirements. These problems can usually be resolved, at least temporarily, with stick-on labels.

In most islands, food safety responsibilities fall under the Ministry of Public Health or its equivalent. The Ministry of Agriculture may also play a role with plant and animal products, both in terms of public health and in terms of plant and animal health. The fragmented nature of the Caribbean has contributed to the development of a number of differences from country to country in SPS and other regulatory requirements and procedures. Resources available to fund regulatory systems, including enforcement, vary widely as well.

Food Security:

Hurricanes are the number one threat to the region's food security, and thus emergency preparedness and response are essential to ensuring the uninterrupted flow of food trade. Other factors, such as interruptions in transportation in the aftermath of 9/11, the 2007/2008 global spike in food prices, and the economic crisis of 2008-2009 have heightened food security concerns in some islands.

Many island governments are making efforts, within their resource limitations, to promote greater food production. There is also interest in addressing the food security issue at the regional level. Regional efforts in 2010-11 resulted in CARICOM approval in October 2011 of a five-year action plan to set in motion its Regional Food and Nutrition Security Policy. The policy identifies four overarching objectives:

- Food Availability – Promote the sustainable production, processing, preparation, commercialization and consumption of safe, affordable, nutritious, high quality Caribbean food commodities/products.
- Food Access – Ensure regular access of Caribbean households, especially the poor and vulnerable, to sufficient quantities of safe, affordable, quality foods at all times, particularly in response to diverse socioeconomic and natural shocks.
- Food Utilization/Nutritional Adequacy – Improve the nutritional status of the Caribbean population, particularly with respect to non-communicable diseases including diabetes, hypertension and obesity.
- Stability of the Food Supply – Improve the resilience of the region's national communities and households to natural and socio-economic crises.

While CARICOM's Regional Food and Nutrition Security Policy and some island-specific efforts are noteworthy, there is broad recognition in the region that efforts to boost farm output will not lead to food self-sufficiency. Still, the objective of improving production of select priority items that can be effectively produced and traded within the region enjoys policy and political appeal. The Caribbean Agricultural Research and Development Institute (CARDI) is focusing its efforts upon: small ruminants (sheep and goats), papaya, hot pepper, poultry, sweet potato, aquaculture, vegetables, coconut, cassava, golden apple, red pea, cow pea, and marine fish. Individual islands with commercial poultry operations are also prioritizing poultry production. To a lesser extent, meat and dairy production are also being prioritized in some islands.

Advantages & Challenges for U.S. Suppliers:

Advantages	Challenges
With little arable land and food production, the islands of the Caribbean must import most of their food needs.	In some markets, such as the French West Indies, traditional ties with Europe are a constraint. Chefs in many islands are European trained and thus prefer European products.
Tourism continues to regain momentum and	Caribbean economic well-being relies heavily on

remains a key factor in generating demand for U.S. products, particularly in the food service sector. The Caribbean is visited by approximately six to seven million stop-over tourists annually.	tourism. Hence, economies remain very susceptible to factors that may disrupt tourism.
The United States is the source of over 50 percent of all tourists visiting the region, boosting demand for U.S. foods.	Ocean transportation rates from the United States can be more expensive than those from Europe.
Proximity and frequent transportation service to the region work to the advantage of U.S. suppliers.	Political interest in attaining “regional food security” or “food sovereignty” has strengthened in recent years, and many islands are actively attempting to boost domestic production and diversify food supplies.
Exposure to U.S. media as well as language, cultural, and commercial ties with the United States all contribute to consumers having a positive attitude toward U.S. products.	The nature of individual island markets requires special effort from U.S. exporters: dealing with several small accounts; consolidation of small orders; complying with different import requirements for select products; ascertaining different market characteristics in every island.
U.S. exporters, particularly south Florida consolidators, service the market very well and are in many ways better positioned to supply the Caribbean than competitors.	The 2008 trade agreement between the Caribbean and the EU has set the stage for increased competition from Europe. CARICOM is also negotiating a free trade agreement with Canada.
The United States has a dominant market share in the vast majority of Caribbean islands (estimated at 55 percent overall).	Other competitors are also targeting the Caribbean. The expansion of the Panama Canal, which is expected to be completed in 2014, may open the door to greater competition from Asia.
The regulatory environment at present is fairly open to U.S. products.	Certain products, particularly meat and poultry, may be restricted in selected markets due to either EU or island-specific requirements.

Author Defined:**Appendix I. Caribbean Islands at a Glance**

(2012 Statistics, except where noted)

Island / Country	Population (Mid-year estimate)	Stop-Over Tourist Arrivals (2011)	GDP (Purchasing Power Parity)	Real GDP Growth (%)	GDP Per Capita (ppp)	Inflation (Consumer Prices, %)	Public Gross Debt (% of GDP)
Anguilla	15,423	65,783	\$175.4 mill ³	8.5 ³	\$12,200 ⁴	4.5	n/a
Antigua & Barbuda	89,018	241,331	\$1.535 bill	1	\$17,500	1.4	97.8
Aruba	107,635	871,316	\$2.258 bill ⁶	2.4 ⁶	\$21,800 ⁷	2.3	n/a
The Bahamas	316,182	1,344,189	\$11.04 bill	2.5	\$31,300	2.5	52.6
Barbados	287,733	567,724	\$7.091 bill	0.7	\$25,500	6.1	70.4
Bermuda	69,080	236,038	\$4.5 bill ⁷	4.6 ⁷	\$69,900 ⁷	2.7	n/a
British Virgin Islands	31,148	337,773	\$853.4 mill ⁷	-0.6 ⁴	\$38,500 ⁷	4	n/a
Caribbean Netherlands	21,133 ²	n/a	n/a	n/a	n/a	n/a	n/a
Cayman	52,560	309,091	\$2.25 bill ⁴	1.1 ⁴	\$43,800 ⁷	1.2	n/a

Islands							
Curaçao	145,834 ²	390,297	\$2.838 bill ⁴	3.5 ⁴	\$15,000 ⁷	2.3 ¹	n/a
Dominica	73,126	75,546	\$1.035 bill	0.4	\$14,600	2	72.3
Grenada	109,011	118,295	\$1.471 bill	0.5	\$14,100	3.2	105.4
Guadeloupe	466,400	407,300	n/a	n/a	n/a	n/a	n/a
Martinique	408,700	489,000	n/a	n/a	n/a	n/a	n/a
Montserrat	5,146	5,396	\$43.78 mill ⁵	3.5 ⁴	\$8,500 ⁵	3.3	n/a
Saint Barthélemy	7,332	n/a	n/a	n/a	n/a	n/a	n/a
Saint Kitts & Nevis	50,726	94,000	\$890 million	0	\$15,500	0.7	144.9
Saint Lucia	162,178	312,404	\$2.234 bill	0.7	\$13,300	4.4	78.7
Saint Martin	30,959	n/a	n/a	n/a	n/a	n/a	n/a
Saint Vincent & The Grenadines	103,537	73,866	\$1.301 bill	1.2	\$11,900	5.1	68.3
Sint Maarten	39,088 ²	424,340	\$794.7 mill ⁴	1.6 ⁴	\$15,400 ⁴	0.7 ³	n/a
Trinidad & Tobago	1,226,383	427,900	\$27.12 bill	0.7	\$20,400	8.7	35.7
Turks & Caicos	46,335	n/a	\$216 mill ⁸	4.9 ⁹	\$11,500 ⁸	2.5	n/a
TOTAL	3,864,685	6,791, 589	n/a	n/a	n/a	n/a	n/a

1. 2011 estimate; 2. 2010 estimate; 3. 2009 estimate; 4. 2008 estimate; 5. 2006 estimate; 6. 2005 estimate; 7. 2004 estimate; 8. 2002 estimate; 9. 2000 estimate.

Source: Population data from CIA World Factbook, Euromonitor, and Central Bureau of Statistics of the Netherlands Antilles; Tourist arrival data from Caribbean Tourism Organization and Euromonitor; GDP & inflation data from CIA World Factbook, debt figures from IMF, Regional Economic Outlook: Western Hemisphere.

Appendix II. Caribbean Agriculture at a Glance

Island / Country	Land Area (sq. km.) / % Arable	Ag % of GDP	% of Labor Force in Ag.	Crop Prod. Index 2010 (‘04-‘06 =100) ¹	Food Prod. Index 2010 (‘04-‘06 = 100) ²	Agricultural Products
Anguilla	91 / 0	2.2	4	n/a	n/a	Small quantities of tobacco, vegetables; cattle
Antigua	443 / 18.2	2.1	7	101.2	106.1	Cotton, fruits, vegetables, bananas, coconuts,

						cucumbers, mangoes, sugarcane; livestock
Aruba	180 / 10.5	0.4	n/a	n/a	n/a	Aloes; livestock; fish
The Bahamas	10,010 / 0.6	2.1	5	110	110.6	Citrus, vegetables; poultry
Barbados	430 / 37.2	3.1	10	94.7	100.1	Sugarcane, vegetables, cotton
Bermuda	54 / 20	0.7	3	115	110.9	Bananas, vegetables, citrus, flowers, dairy products, honey
British Virgin Islands	151 / 20	1	0.6	n/a	n/a	Fruits, vegetables; livestock, poultry; fish
Caribbean Netherlands	322 / n/a	n/a	n/a	n/a	n/a	Very limited agriculture
Cayman Islands	264 / 3.9	0.2	1.9	102.2	103.2	Vegetables, fruit; livestock; turtle farming
Curaçao	444 / 10	0.7	1.2	n/a	n/a	Aloe, sorghum, peanuts, vegetables, tropical fruits
Dominica	751 / 6.7	13.2	40	112.5	108.6	Bananas, citrus, mangoes, root crops, coconuts, cocoa
Guadeloupe	1,628 / n/a	15	15	n/a	n/a	Sugarcane, bananas, vegetables, plantain, cocoa, flowers, root crops
Grenada	344 / 5.9	5.2	11	88.4	93.5	Bananas, cocoa, nutmeg, mace, citrus, avocados, root crops, sugarcane, corn, veg.
Martinique	1,128 / n/a	6	n/a	n/a	n/a	Sugarcane, bananas, pineapples, cut flowers, avocados, citrus, vegetables; fish
Montserrat	102 / 20	1.6	n/a	n/a	n/a	Cabbages, carrots, cucumbers, tomatoes, onions, peppers; livestock products
St. Barthélemy	21 / n/a	n/a	n/a	n/a	n/a	No significant agriculture
St. Kitts & Nevis	261 / 19.4	1.6	n/a	19.1	29.3	Sugarcane, rice, yams, vegetables, bananas; fish
St. Lucia	606 / 6.5	2.7	21.7	108.4	110.9	Bananas, coconuts, vegetables, citrus, root crops, cocoa
St. Martin	54 / n/a	1	n/a	n/a	n/a	No significant agriculture, limited fish
St. Vincent & the Grenadines	389 / 18	6.5	26	124.2	116	Bananas, coconuts, sweet potatoes, spices; cattle, sheep, pigs, goats; fish
Sint Maarten	34 / 10	0.4	1.1	n/a	n/a	Sugar
Trinidad &	5,128 /	0.3	3.8	64.1	89	Cocoa, rice, citrus, coffee,

Tobago	14.6					vegetables; poultry
Turks & Caicos	948 / 2.3	1	20	n/a	n/a	Corn, beans, cassava (tapioca), citrus fruits; fish

1. Crop production index includes all crops except fodder crops.

2. Food production index covers food crops that are considered edible and that contain nutrients. Coffee and tea are excluded because, although edible, they have no nutritive value.

Source: CIA World Factbook, World Bank (World Development Indicators), Euromonitor & CBATO research.

Appendix III. U.S. Agricultural Exports to the Caribbean, CY2012

(Thousands of Dollars)

	CBATO Islands	Cuba	D.R., Jamaica & Haiti	All Caribbean Islands
Bulk	171,881	199,824	705,029	1,076,734
Intermediate	167,665	79,465	477,316	724,446
Consumer	874,337	181,123	681,358	1,736,818
Forest Prod.	151,059	0	89,795	240,854
Seafood	35,942	0	17,048	52,990
Total	1,400,884	460,412	1,970,546	3,831,842

Source: Derived from U.S. Bureau of the Census trade data.

Appendix IV. CBATO Island Representation in Selected International Organizations

		Codex	CARICOM	OECS	CARIFORUM	IICA
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Country/Island	WTO Member	Commission Member	Member	Member	Member	Member
Anguilla	1/	1/	Associate member	Associate member		
Antigua & Barbuda	Yes	Yes	Yes	Yes	Yes	Yes
Aruba	2/	2/	Observer			
The Bahamas	Observer 4/	Yes	Yes		Yes	Yes
Barbados	Yes	Yes	Yes		Yes	Yes
Bermuda	1/	1/	Associate member			
British Virgin Islands	1/	1/	Associate member	Associate member		
Caribbean Netherlands	3/	3/				
Cayman Islands	1/	1/	Associate member			
Curaçao	2/	2/				
Dominica	Yes	Yes	Yes	Yes	Yes	Yes
Grenada	Yes	Yes	Yes	Yes	Yes	Yes
Guadeloupe	5/	5/				
Martinique	5/	5/				
Montserrat	1/	1/	Yes	Yes		
Saint Barthélemy	6/	6/				
Saint Kitts & Nevis	Yes	Yes	Yes	Yes	Yes	Yes
Saint Lucia	Yes	Yes	Yes	Yes	Yes	Yes
Saint Martin	6/	6/				
Saint Vincent & The Grenadines	Yes	Yes	Yes	Yes	Yes	Yes
Sint Maarten	2/	2/				
Trinidad & Tobago	Yes	Yes	Yes		Yes	Yes
Turks and Caicos Islands	1/	1/	Associate member			

1/ - As an overseas territory of the U.K., it is indirectly represented thru the U.K.; 2/ - As an autonomous country within the Kingdom of the Netherlands, it is indirectly represented thru the Kingdom; 3/- As overseas municipalities of the Kingdom of the Netherlands, the Caribbean Netherlands are represented by the Kingdom; 4/ - The Bahamas is in the process of WTO accession. The first accession Working Party meeting for The Bahamas was held on September 14, 2010; 5/ - As an overseas Department of France, it is represented by France; 6/ - As an overseas collectivity of France, it is represented by France.

Source: CBATO research.

