

Required Report - public distribution

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## Caribbean Basin

### Market Development Reports

### Pet Food Market Report

### 2004

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Caribbean Basin ATO

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**Report Highlights:**

A strong affinity for pets combined with minimal production of pet foods leads Caribbean countries to import over \$ 17.6 million of pet food products from the United States. Steady growth in U.S. pet food exports over the past ten years resulted in a 95 percent U.S. market share for pet food in the Caribbean in 2003. Although most pet owners purchase premium pet foods at supermarkets, the hottest trend is specialty pet foods with nutritional benefits. In addition, the expansion of retail outlets offering pet food products now include more veterinary offices and pet supply stores.

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Includes PSD Changes: No  
Includes Trade Matrix: No  
Unscheduled Report  
Miami [C11]  
[C1]

## SECTION 1: MARKET SUMMARY

The U.S. pet food's thriving industry has spurred worldwide exports to grow over the past decade to reach over \$1 billion in 2003. One of the top ten regional export markets for U.S. pet foods, the Caribbean, produces minimal pet food products for local pet owners. As a result of the rapid growth in demand, pet food retailers often run out of supply before the next shipment arrives. The quality and recognition of U.S. brand pet foods explains why Caribbean supermarkets, pet supply stores and veterinarians rely on imports from the United States, the leader in pet food export to the Caribbean, to meet local demand.

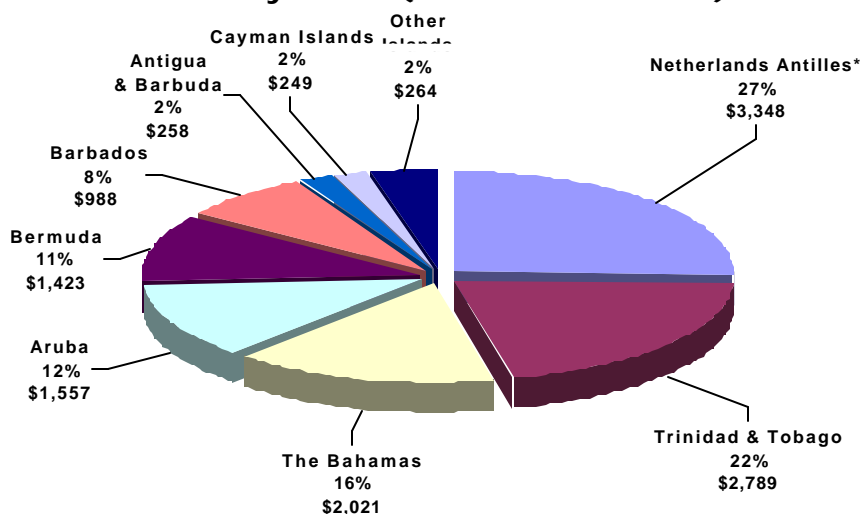
### A. Market Size

In 2003, U.S. exports of pet food products destined for the Caribbean reached their highest level ever, totaling \$17.6 million, making this region the sixth largest export market for U.S. pet foods. On average, we estimate that the U.S. market share of pet food products in the Caribbean is 96 percent, with the remaining imports coming from Canada and Europe.

With over 27 percent share of the total U.S. pet food product export to the Caribbean, the Netherlands Antilles (St. Martin, St. Eustatius, Saba, Curacao and Bonaire), are the largest market in the Caribbean for U.S. pet food products. This report covers all of the Caribbean islands including Bermuda and excluding Jamaica, the Dominican Republic and Haiti. Please consult our office in the Dominican Republic for information on these countries (see Section VIII). Other major Caribbean importers of pet food products include the Bahamas, the Cayman Islands, Aruba and the Leeward-Windward Islands (Anguilla, Antigua-Barbuda, British Virgin Islands, Dominica, Grenada, Montserrat, St. Christopher-Nevis and St. Lucia) (see figure 1). The relative percentages of market share between Caribbean islands have not changed significantly over the past 10 years with several Caribbean countries dividing the market relatively evenly.

A current trend among Caribbean pet owners is to opt for a pure bred dog. The historic British and European rule may have influenced the Caribbean preference for dogs as pets, over cats and other animals. Although the current ownership of dogs in Great Britain has declined in response

**Figure 1. 2003 U.S. Exports of Pet Food to the Caribbean, by Value (USD In Thousands)**



UNCLASSIFIED

\* Netherlands Antilles: St. Martin, St. Eustatius, Saba, Curacao and Bonaire

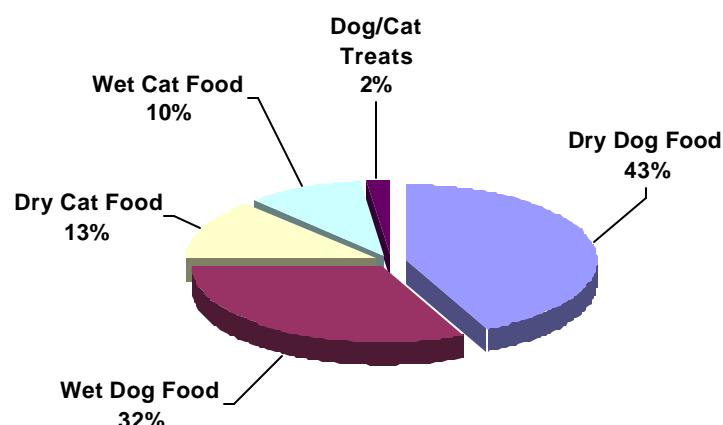
Source: Foreign Agricultural Service, BICO Report, 2004

al Service

to changes in local lifestyle in recent years, most Caribbean pet owners have held to the tradition of dog ownership. This coupled with the relaxed atmosphere of the Caribbean and higher social status has dogs outnumbering cats by about three to one.

Dry dog and cat foods are respectively the most imported pet food products in the Caribbean. In most islands dry pet food comprises the majority of these imports. One exception is the Cayman Islands, where wet pet food imports are now increasing due to the aggressive marketing of several brands of wet foods for dogs and cats. Treats are less often imported yet retain potential for growth because of their immediate availability from the U.S. supply and the ever-present American cultural influence on Caribbean markets. Pet foods for small animals and birds are present, but in far smaller quantities.

**Figure 2. Comparison of the Types of Pet Food Purchased, by Value**



Source: Interviews with importers including supermarkets, pet supply stores, and veterinary offices in the Caribbean, 2004

## B. Contributing Factors

While pet food products differ from other Caribbean agricultural imports in that they are not directly dependent on tourism, several other characteristics contribute to the variation in the pet food markets among the Caribbean islands. Population, per capita income, location and preference are just some factors which affect a Caribbean country's demand and, consequently, their import of pet food products. Although the Caribbean market is for the most part consistent, any individual country of interest should be explored for effective market entry.

Specific to each market, overall demand differs most according to both the level of per capita income and population size. Household incomes in countries such as Bermuda and the Cayman islands are higher than most in the Caribbean, and prove that population size can be outweighed by economic wealth, producing growth in pet food imports (see table 1). Nevertheless, most islands have low per capita gross domestic product (GDP), which makes pet ownership and pet food a luxury. Overall, most consumers in the Caribbean are very price conscious, and as a result, place less importance on name brands.

**Table 1. Comparison of GDP Per Capita and Annual Per Capita Spending Based on U.S. Exports to Each Island, by Value**

Country	GDP Per Capita (USD 1,000, 2002 est.)	Per Capita Annual Spending on Pet Food
Bermuda	\$35,200	\$22.07
Cayman Islands	\$35,000	\$5.94 <sup>1</sup>
Aruba	\$28,000	\$21.98
The Bahamas	\$17,000	\$6.79

Barbados	\$14,500	\$3.56
Netherlands Antilles <sup>2</sup>	\$11,400	\$15.48 <sup>2</sup>
Antigua & Barbuda	\$11,000	\$3.80
Trinidad & Tobago	\$9,500	\$2.53
Guadeloupe	\$9,000	\$0.27 <sup>4</sup>
St. Kitts & Nevis	\$8,800	\$2.73

Sources: Foreign Agricultural Service, BICO Report, 2004; Central Intelligence Agency, World Factbook, 2003

<sup>1</sup> Both Cayman trade and government officials agree that the import statistics are understated, for some unknown reason.

<sup>2</sup> Netherlands Antilles: St. Martin, St. Eustatius, Saba, Curacao and Bonaire

<sup>3</sup> Reexport and an unusually high ownership rate in Curacao explain this high value.

<sup>4</sup> Guadeloupe purchases pet food from mainland France, rather than the United States.

The location of an island can also play a role in the import of pet food. For example, 10 to 20 percent of St. Martin's pet food imports are products that are re-exported to neighboring countries like St. Eustatius with fewer direct shipments available. The island of Dominica, for example, imports roughly 25 percent of its pet food supply from neighboring Caribbean countries, which are imports originating from the United States. In addition, since St. Martin is duty free, individuals often take a day shopping trip from neighboring islands where tariffs on grocery products in general are high.

The scores of retiring American baby-boomers becoming permanent or at least seasonal residents of Caribbean countries are impacting the market broadly through population, per capita GDP and most of all, product preference. Affluent expatriates and returning Caribbean-Americans are bringing pets from their previous homes or buying pets, mostly dogs, from local and foreign breeders. Many of these consumers prefer specialized products for pet health and are more disposed to the purchase of high priced pet foods and treats.

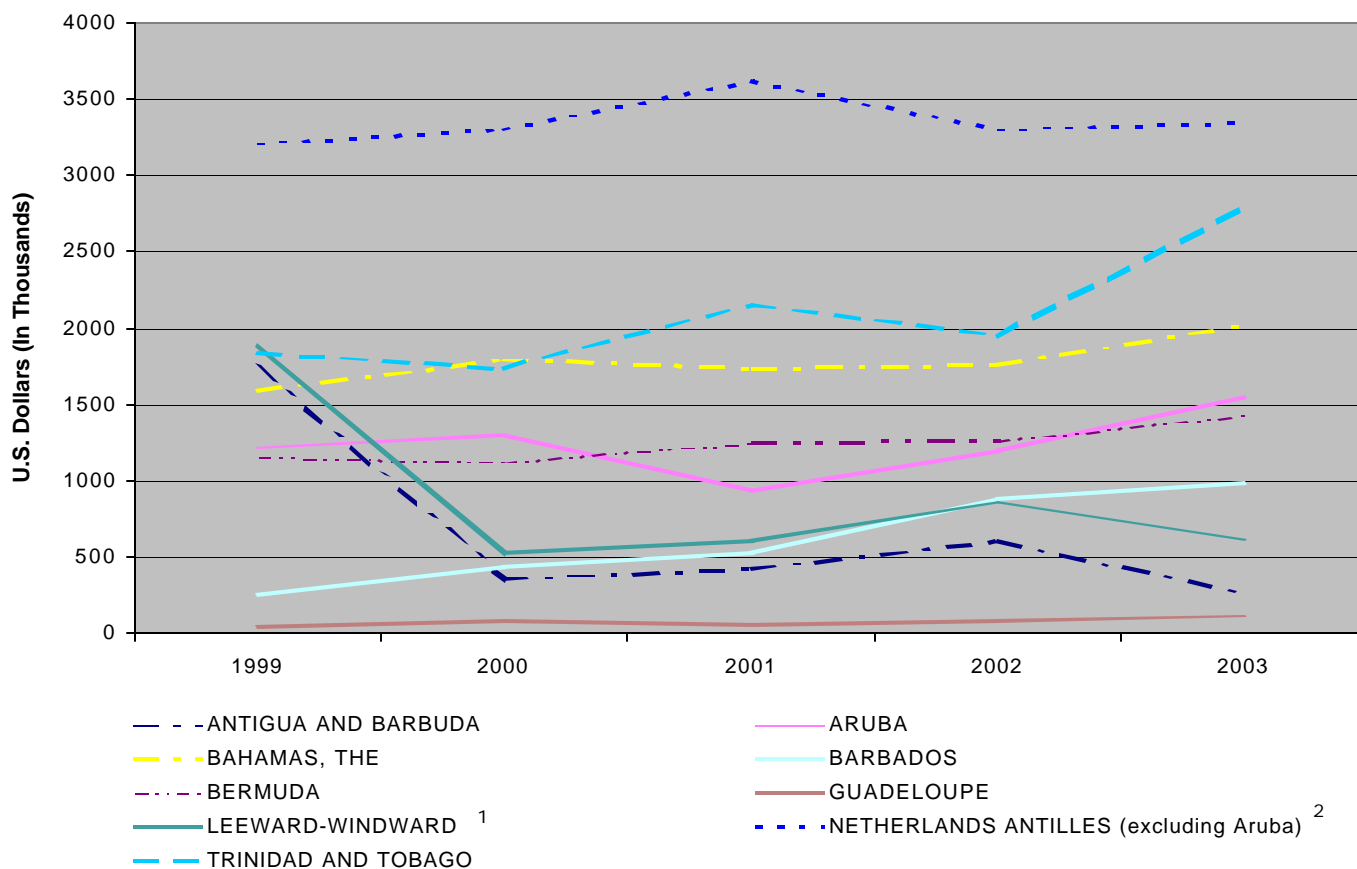
Traditional custom on each island can also vary and influence consumer preference. While local veterinarians are trying to spread the word that table scraps and other foods are not fit for pet consumption, a subset of the population still believes that buying commercial food for cats, dogs and other animals is unnecessary or too expensive. St. Lucia, for example, only began importing pet food four years ago. Conversely, most pet-owners living in countries with a high GDP like the Cayman Islands and Bermuda feed their pets primarily commercial foods, and increasingly the highest end pet foods.

Various circumstances, in addition to those previously mentioned will affect the quantity and dollar value of pet food imports. To illustrate, the highest percentage of Caribbean pet food imports goes to the Netherlands Antilles, which does not have a comparatively large population. However, the large volume can be explained by a combination of re-exports to islands and neighboring St. Martin and a considerable amount of large-sized bags of dry dog food exported to the relatively small island of Curacao. In Curacao, dog ownership is popular and many households have multiple dogs.

Because of its minimal connection to the tourism industry, pet food product export to the Caribbean was nearly unaffected by the economic downturn experienced as a result of the events of September 11<sup>th</sup>, 2001. Although a downturn in the local economy occurred as it did in the United States, most countries continued to show a slight increase in importing U.S. pet foods (see figure 3).

**Figure 3. U.S. Exports of Pet Food Products to the Caribbean, by Country, by Value**

**1999-2003**



<sup>1</sup> Leeward-Windward Islands: Anguilla, Antigua & Barbuda, British Virgin Islands, Dominica, Granada, Montserrat, St. Christopher-Nevis, St. Lucia and St. Vincent & the Grenadines

<sup>2</sup> Netherlands Antilles: St. Martin, Curacao and Bonaire

Source: Foreign Agricultural Service, BICO Report, 2004

Import duties on pet foods are usually higher in countries with a low per capita GDP. When comparing per capita GDP or average income to local pet food duties, the duties have surprisingly less importance in product demand. In countries with a higher GDP, duties range from about 12 to 20 percent, while duties in lower GDP countries have a higher range of about 35 to 60 percent.

The local government officials in finance and customs have jurisdiction over pet food imports to their respective islands. Barbados and Trinidad and Tobago are countries that also engage the local agriculture authority to monitor pet food imports made with beef as a result of the Bovine

Spongiform Encephalopathy (BSE or Mad Cow Disease) outbreak. Where requirements ban the import of pet foods with specific byproducts, officials can confiscate them and either destroy or return the shipment. However, this is rare, and most pet food shipments to the Caribbean encounter no difficulties.

Advantages	Challenges
U.S. pet food products are well recognized, recommended by local veterinarians and preferred by Caribbean residents.	Many Caribbean importers already have established U.S. pet food export relationships with major manufacturers.
Specialty pet foods are gradually increasing in demand.	Caribbean importers in countries with lower per capita GDP do not have much interest in pet treats.
Barbados is the only island producing pet food and still imports significant quantities from the United States.	Many Caribbean residents with pets traditionally feed them table scraps, against the advice of local veterinarians.
The market for pet food products has remained stable, even in the recent economic downturn.	Some Caribbean countries have high duties on pet food products, which are often seen as luxury items.
Importers typically use one or several consolidators in Florida for their grocery products.	Few importers have a large enough market to import full containerloads of pet food.

## SECTION II: ROAD MAP FOR MARKET ENTRY

### Market Structure

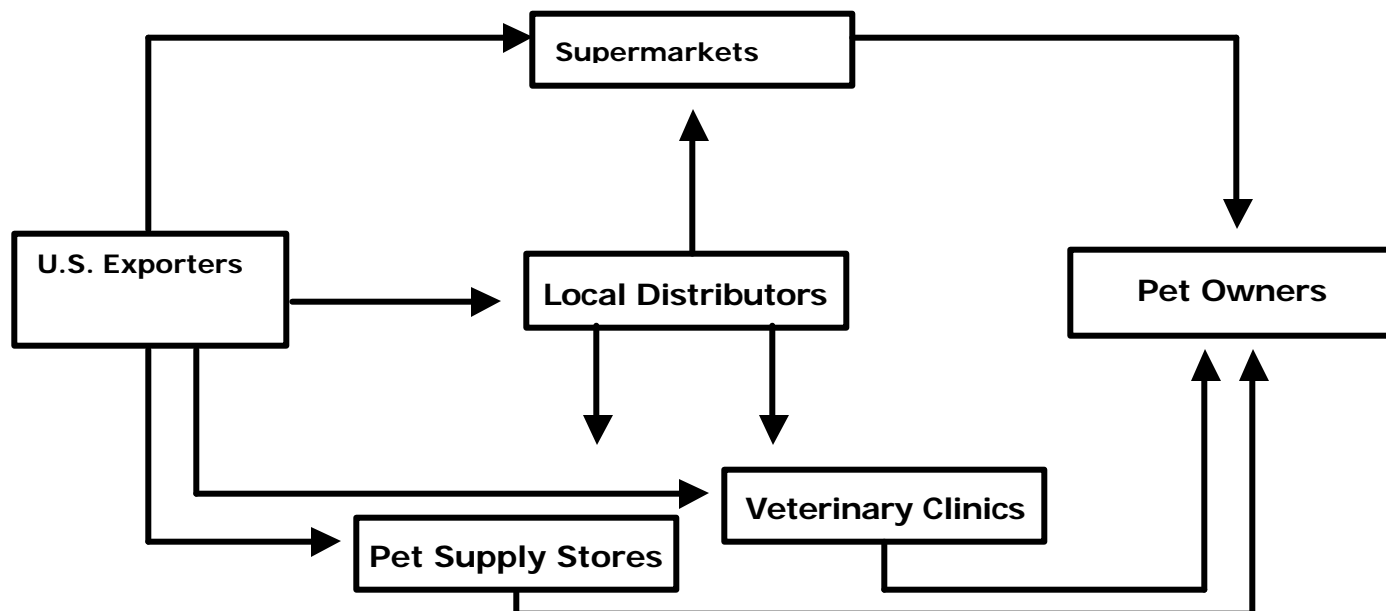
The market for pet food products can flow through several paths in the import sequence. By far, the largest quantity is sold through supermarkets, which import directly from suppliers in the United States. Importers and distributors also play an important role, importing large quantities for local retailers. Caribbean pet supply stores, growing in number and size, carry a variety of supplies for pets either imported directly, or sourced through the local distributor. Veterinarians usually acquire their imports through local distributors or will occasionally import directly. Caribbean pet owners purchase from a local pet store, veterinarian or supermarket

depending on the availability of the product and/or the brand demanded. Other consumers of pet food products in the Caribbean include animal shelters and veterinary clinics.

Pet food products are primarily shipped to Caribbean importers via sea. In fact, many Florida shipping companies offer weekly service to the main ports in the Caribbean (see section VII for more details). It is important to note that few markets are large enough to order full containerloads. For this reason, it is important to get information from importers on their consolidators, most often located in Miami, Florida.

Embarking on new export business with Caribbean islands can be a demanding yet rewarding venture for U.S. exporters of pet food products. Recognizing the special needs of the region, as with any export scenario, will help make the process smoother and more lucrative.

### ***Product Flow for Imports:***



### **A. Supermarkets**

#### **Entry Strategy**

Supermarkets generally import pet food products directly from manufacturers and, less regularly, through local distributors representing a brand name. However, the major brands all have in-country product representative. Depending on the strength of the supermarket versus the product representative and how strictly laws for exclusive agreements are enforced, the product representative may or may not receive payment for products imported directly. For example, supermarkets in St. Lucia do not pay the product representative when they import directly. With temporary lower cost pricing available occasionally from U.S. discounters, Caribbean supermarkets increasingly bring in parallel imports, much to the chagrin of the product representative. On the other hand, the product representative for Pedigree in St. Martin receives their commission, even when the supermarkets import directly. Direct import by the supermarket makes sourcing these products easier and will include special incentives that might not have been passed down from the local representative. Pedigree and Purina, the largest pet food manufacturers in the United States, are maintaining the most shelf space in Caribbean supermarkets. Some supermarkets, will import private label and other sought-after products directly.

Private label products are key to the Caribbean supermarket inventory. Most Caribbean customers will rely on a supermarket more than any other source for lower-priced products as well as the major name brands. Typically, the majority of imported products for supermarkets are dry dog food, dry cat food, wet dog food and wet cat food respectively. The average pet owner and supermarket customer in the islands that can afford to buy pet food is buying mainly premium pet foods featured in the product lines of major brand names. The client base for supermarkets consists of mainly individual pet owners, but also includes pet shelters and some veterinary clinics.

Very few Caribbean supermarket pet product buyers have attended past trade shows held by U.S. pet product trade associations and individual exporters. However, they do visit pet food producers at the U.S. Food Export Showcase at FMI (see section VI). They, along with most pet food importers, prefer to make contact with exporters at these trade shows and events.

Last year, an average of 15 new pet food products were introduced in Caribbean supermarkets, with almost all of them becoming permanently stocked. However, almost all of these were new products introduced by Pedigree and Purina. Trial samples are an ideal way to introduce a new pet food product to supermarket customers. Caribbean buyers often remark that the more marketing and promotion behind a product, the more success in sales will result. In addition, since supply seems to run out often, keeping in close contact with buyers should help alleviate this problem.

## B. Distributors

### Entry Strategy

Distributors, who all import, supply supermarkets, pet stores and veterinarian clinics. Pet food products imported by distributors primarily consist of the largest brand names and about 15 to 20 percent of upper premium brands. Large, economy sized bags of dry dog food are a favorite of many distributors and wholesalers. In general, dry outsells wet dog and cat food. Overall, both wet and dry dog food is dominant over cat food sales at around 75 percent.

Contacts made at trade shows are the preferred method of introducing pet food products to distributors. Knowledge of the recent development patterns on the islands through distributors can give U.S. exporters a better idea of the size of market and an opportunity to collect the top local contacts.

Distributors generally import items that are requested by their retail business clients, including supermarkets, pet supply stores and veterinarians. U.S. companies may also meet with this driving force for maximum import.

## C. Pet Supply Stores

### Entry Strategy

Most pet supply stores are importing directly from their U.S. suppliers, which are typically wholesalers. Some premium brands represented locally, such as Pedigree or Purina, are



purchased through the local distributor. They supplement these premium brands with upper premium brands to offer the customer the widest possible selection.

At pet supply stores, requests for pet food products are usually made from past preference or by patrons who travel to the United States and have knowledge of products sold there. Their customers, a higher income group, are more concerned with brand than price, buying more upper premium brand products. More pet stores exist on islands with a high per capita GDP, like Bermuda or with high populations, such as Trinidad. Sourcing new varieties is very important for importers since islands are only so large and holding a wider assortment of products gives them an advantage over the competition.

The owners of pet supply stores make most, if not all, of the purchasing decisions.

The best choice for approaching this market is through U.S. trade shows. Trial samples at some of the larger local dog or cat shows would reach the mostly likely customers. When talking to pet store retailers, ask what pet food products local pet owners and veterinarians are requesting. Determine what products veterinarians and supermarkets are already selling, which are in fierce competition to the pet supply store.

## **D. Veterinary Clinics**

### **Entry Strategy**

Veterinary clinics will import prescription dog or cat foods one pallet at a time or go through a local distributor. On islands where per capita GDP and pet food spending is low, the pet clinic or veterinarian's office is a very minor route for sale of pet food products, yet should still be considered when evaluating the market preferences.

Veterinarians usually select brands through word of mouth within the profession. Veterinarians do not attend trade shows or pet shows as often as other importers, so product samples and literature provide a better opportunity to introduce pet foods to clinics and offices around the Caribbean. Upper premium brands are most often the products of choice in this sector. Veterinarians have a hard time dealing directly with companies who manufacture leading upper premium brands since the size of their orders are so small. Weight loss, joint health and vitamin supplemented pet foods also top the list of trends now in demand in this and the pet supply sector.

If a local veterinarian is interested in selling pet foods for the first time, check with the local distributors to determine if it can be consolidated with their shipment to lower transportation costs for the importer.

## **SECTION III: COMPETITION**

Imports from Canada and Western Europe also occur, but together they only account for about 3 to 4 percent of the Caribbean market. Minimal imports from the European Union are usually present on islands with a stronger British or European influence, while Canadian imports are usually sought for the economical private label brands they offer such as the President's Choice

line of pet food. The Netherlands Antilles also imports pet food from Holland, which arrives on containers with other grocery products from the Netherlands.

Among the Caribbean countries, Barbados has the only locally manufactured dry dog food, VitaPet, a well-known and trusted product which supplements the local supply of U.S. dry dog food imports. In addition, imports from other Caribbean islands are most often re-exports of U.S. pet food products.

Some stores on islands with high import duties on pet food find competition with U.S. businesses when individual pet owners bring bags of pet food home from their trips to the United States. The Caribbean perception of the quality of both product and service of U.S. brands far outweigh those of any other country.

## **SECTION IV: BEST PRODUCT PROSPECTS**

### **A. Products present in the market, which have good sales potential**

Private label dry dog and cat foods  
Upper-Premium dog and cat foods  
Special diet pet foods: weight loss, joint health and vitamin enriched  
(in upper end markets)  
Economy-sized, large bags of dog food  
Bird food (Cayman Islands)  
All-in-one nutrition dog and cat foods

Pet food retailers are very interested in inexpensive private label foods in many Caribbean countries like the Bahamas, St. Lucia and Trinidad to meet the demands of customers with lower incomes. In countries like Barbados, demand is growing for upper premium pet food brands in pet supply stores and veterinarian clinics. Veterinarian and pet supply stores are especially interested in specialty pet foods, recommended for various conditions. Along the same lines are all-in-one nutrition pet foods, sought to satisfy most nutritional needs for one low price.

### **Products not present in significant quantities but which have a good sales potential**

Treats and bones (Bermuda and Cayman Islands) are less significant in the Caribbean market. Meanwhile, interest in these products among higher income consumers is steadily growing.

### **Products Not Present Because They Face Significant Barriers**

In an effort to protect the population from Bovine Spongiform Encephalopathy (BSE), Barbados and Trinidad & Tobago have new requirements for pet foods from the United States.

## **SECTION V: EXPORT REQUIREMENTS**

Each Caribbean country has different requirements for pet food products that are imported from the United States. The customs or finance ministries in each country can provide detailed information on import requirements. For more information on tariffs visit [www.ita.doc.gov/td/tic/tariff/](http://www.ita.doc.gov/td/tic/tariff/). U.S. exporters may also need an export certificate from APHIS Veterinary Services as specified by the country of import of an updated list visit [www.aphis.usda.gov/NCIE/iregs/products/](http://www.aphis.usda.gov/NCIE/iregs/products/).

However, we encourage you to talk with your importer to find out how the regulations are actually implemented.

## SECTION VI: TRADE SHOWS

The following are some of the trade shows attended by Caribbean pet food importers:

- APPMA Pet Products Show                      Mid-March, 2005                      New Orleans, LA  
[www.appma.org](http://www.appma.org)
- Pet Industry Spring Trade Show  
     & Educational Conference                      April 1-3, 2005                      Atlantic City, NJ  
     Christmas Trade Show                      October 8-10, 2004                      Chicago, IL  
[www.hhhbacker.com](http://www.hhhbacker.com)  
     Tel (312) 663-4040  
     Fax (312) 663-5676
- Food Marketing Institute Show (FMI) May 1-3, 2005    McCormick Place, Chicago  
[www.fmi.org/events/may/2005/](http://www.fmi.org/events/may/2005/)  
     Tel (202) 852-8444  
     Fax (202) 429-4519

## SECTION VII: Selected Transportation and Shipping Lines

Company	Islands Serviced	Telephone	Fax	Website
Bernuth	AG, BB, DA, GJ, GP, MB, MO, SM, SC, SL, VC	305-633-7711	305-635-9247	<a href="http://www.bernuth.com">www.bernuth.com</a>
Bon Bini Cargo, Inc.	AR, CU	305-594-1111	305-594-0013	<a href="http://www.bon-bini.com">www.bon-bini.com</a>
Caribtrans	AC, AG, BB, DA, GJ, MO, SA, SB, SE, SC, VC, TD	305-696-1200	305-691-3786	<a href="http://www.caribtrans.com">www.caribtrans.com</a>
Crowley American Transport	AR, AC, AG, BF, BB, BN, CU, DO, GJ, GP, MB, SA, SB, SE, SM, SC, ST, VC, TD	800-874-6769	305-470-4291	<a href="http://www.crowley.com">www.crowley.com</a>
King Ocean	AR, BN, CU, TD	305-591-7595	305-593-9769	<a href="http://www.kingocean.com">www.kingocean.com</a>
Maersk, Inc.	BF, GP, MB, TD	305-220-6660	305-220-7081	<a href="http://www.maersksealand.com">www.maersksealand.com</a>
Navieras	AC, GU, MO, SB, SC, TD	800-446-5569	800-881-0980	<a href="http://www.navierasbr.com">www.navierasbr.com</a>
Seabaord Marine	AC, BB, TD	305-863-4444	305-863-7498	<a href="http://www.seabaordmarine.com">www.seabaordmarine.com</a>
Tropical Shipping	AC, BF, BB, SB, SC, N, ST, VC, TD	305-913-8226	305-913-4902	<a href="http://www.tropical.com">www.tropical.com</a>
Zapcargo Services	AC, BB, TD	305-592-0824	305-592-0896	<a href="http://www.zapcargo.com">www.zapcargo.com</a>

Key			
AC-Antigua	BN-Bonaire	MB-Martinique	SC-St. Kitts & Nevis
AG-Anguilla	BVI-British Virgin	MO-Montserrat	ST-St. Lucia
AR-Aruba	CI-Cayman Islands	SA-Saba	VC-St. Vincent
BF-The Bahamas	CU-Curacao	SB-St. Barthelemy	TR-Trinidad & Tobago
BB-Barbados	GJ-Grenada	SE-St. Eustatius	
BD-Bermuda	GP-Guadeloupe	SM-St. Maarten	

## SECTION VIII: POST CONTACTS

### A. For more information and an importer list, please contact:

#### Caribbean Basin Agricultural Trade Office

Foreign Agricultural Service  
 United States Department of Agriculture  
 909 SE 1st Ave, suite 720  
 Miami, Florida 33131  
 Phone: (305) 536-5300  
 Fax: (305) 536-7577  
 Email: [cbato@cbato.net](mailto:cbato@cbato.net)

#### Margie Bauer, Director

Email: [cbato@cbato.net](mailto:cbato@cbato.net)  
 Omar González, Deputy Director  
 Email: [omar@cbato.net](mailto:omar@cbato.net)  
 Graciela Juelle, Marketing Specialist  
 Email: [cbato@cbato.net](mailto:cbato@cbato.net)

Please visit our website for promotional activities, trade statistics and more reports on the retail and food service sectors and on food import regulations for several Caribbean islands.  
<http://www.cbato.fas.usda.gov>

#### Dominican Republic Agricultural Affairs Office

David Salmon, Agricultural Attaché  
 Foreign Agricultural Service  
 United States Department of Agriculture  
 Ave. Pedro Henriquez Urena #133 4to. Pi  
 Edificio Reyna I (COMSER) La Esperilla  
 Santo Domingo, Dominican Republic  
 Phone: 809-227-0112  
 Fax: 809-732-9454  
 Email: [agsantodomingo@usda.gov](mailto:agsantodomingo@usda.gov)  
<http://www.usemb.gov.do/FAS/fasindex.htm>

Basic country information may be found in the **Central Intelligence Agency's** World Fact Book under the country of interest.

<http://www.odci.gov/cia/publications/factbook>

### **Department of Commerce**

U.S. Commercial Service

Information on marketing U.S. products and services is in the Country Commercial Guide for most Caribbean countries.

<http://www.export.gov>

Click on *Market Research* link, then select *Country & Industry Market Reports*.

### **Department of State**

Bureau of Consular Affairs

Links to United States Embassies and Consulates Worldwide

<http://travel.state.gov/links.html>

### **Foreign Agricultural Service, USDA**

BICO Reports

Provides bulk, intermediate, and consumer-oriented agricultural product data per calendar or fiscal year.

[http://www.fas.usda.gov/scripts/bico/bico\\_frm.asp](http://www.fas.usda.gov/scripts/bico/bico_frm.asp)

### **APHIS- Veterinary Services**

Animal and Plant Health Inspection Service, USDA

Miami, Florida

Phone: 305-526-2825

Fax: 305-871-4205

<http://www.aphis.usda.gov/vs/>

## **B. Other sources of Information on the Caribbean pet food market:**

### **CARICOM**

Caribbean Community Common Market

P.O. Box 10827

Georgetown, Guyana

Phone: 592-226-9280

Fax: 592-226-7816

Home Page: [www.caricom.org](http://www.caricom.org)

### **Pet Food Institute**

2025 M Street, NW, Suite 800

Washington, DC 20036

Phone: 202-367-1120

Fax: 202-367-2120

Home Page: [www.petfoodinstitute.or](http://www.petfoodinstitute.or)