CARICOM
Agribusiness Development Programme
(EU-funded)

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CONCEPT NOTE

A. Background and key agro-development issues facing the region

In most of the CARICOM member states, development of the agriculture sector is important for sustaining improving food security, diversifying the local economy (e.g., reducing food imports, promoting agro-tourism) and achieving progress towards poverty reduction. In some countries, e.g. the Bahamas, Antigua and Barbuda, the agriculture sector is relatively small. While for others, such as Guyana, Haiti, Belize, Dominica, St. Lucia and St Vincent and the Grenadines, the sector continues to be important source of employment (see table 3 in annex).

While in most countries, agricultural exports account for a significant share of total merchandise trade (table 1), these exports are highly dependent on a few crops and concentrated in one or two markets (tables 5, 6). Further, for the region as a whole, share in world agricultural exports have declined from 2% in 1988 to 0.3% in 2004 (table 2), whereas the share of its neighbours in South and Central America have increased from 6.9% to 9.6% and 2% to 2.6% respectively. At the same time, the region imports considerably more food than the amount exported. Increased consumption of cereals, for example, has led to increased imports of this food group (table 7). This situation creates a potential opportunity for Guyana and Suriname, the main cereal producers in the region. In other food categories, such as fruit and vegetables, imports have increased despite sufficient domestic supplies, in most of the countries, to cover their needs (tables 4, 7). In terms of value, agricultural exports remained around US$1 billion from 1990-2004 while, for the same period, the value of agricultural imports moved from just under US$ 1.5 billion to about US$2.3 billion.

Export diversification emerged throughout the wider region during the 1980s as a key strategy for agricultural development. However, overall results have been mixed. Nontraditional agricultural export sectors, such as organic juice in Belize, fresh vegetables and fruits in the DR and ethnic foods in Jamaica have been established and enjoyed periods of high growth, but overall they remain highly vulnerable to changes in preferential trade agreements, sanitary and phytosanitary challenges, increased extra-regional competition, small domestic markets, among others. Most of the interventions by the government have been too limited in scope to address effectively the diseconomies of small size, natural constraints, sectoral wage imbalances, high input costs, including energy, and limited participation of the private sector. At the same time, crop yields have declined, consumption cost of agricultural produce is high, and incomes of smallholder farmers (who comprise the majority of producers) are low and dependent primarily on farm incomes. Small holder farmers' productivity and incomes are adversely affected by market uncertainties, which are in turn related to weak coordination between informal and formal marketing channels in both domestic and regional trade

Global trends impacting agro-food systems

Added to these constraints, there are other challenges arising from range of demographic, social, technological, organizational, and economic trends that are affecting agro-food systems worldwide, including[1]:

- Demographic changes, including urbanization, population growth in non-farming segments, and household income growth will all yield opportunities (especially related to higher value food products and food service industry development), but will also place greater demands on the management of urban food distribution systems, increase the level and types of food safety risks etc
- Increasing consumer sovereignty, with greater attention to variety, health, sustainability, animal welfare, and other concerns and attributes. For those with a good understanding of market demand and with ample marketing skills and alliances, there is wider scope for profiting from consumer "wants." Satisfying those wants will require changes in production and supply arrangements and the associated tracking and accountability systems.
- Emerging technologies, especially in information technology, biotechnology, food safety and measurement technologies (color & price scanning). Those able to adopt and manage these technologies are potentially able to improve product quality, achieve coordination and other cost efficiencies and reduce a variety of business and food safety risks. These are, however, capital intensive technologies
- Growing concentration in the food and agricultural technology industries, in part due to continued merger and acquisition activity by leading companies. This pattern exacerbates the asymmetry of market power in the agro-food system, potentially further raising barriers to smaller players who need to meet the requirements of the fewer and larger "gatekeepers" on the path to remunerative consumer outlets. Suppliers in developing countries will need to consider and pursue strategic relations (horizontal and vertical) fro technology transfer and marketing
- Multilateral trade liberalization, which is lowering tariff and quantitative barriers to trade even though agriculture remains one of the most protected tradable sectors in the world. This trade liberalization is a double-edged sword for

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[1] Taken from *Modernizing Africa's Agro-Food Systems: Analytical Framework and Implications for Operations,* World Bank

developing countries, opening up new market opportunities yet further exposing their own domestic markets to competitive products from abroad. Competitiveness is now a serious challenge in the agro-food industry

- The internationalization and privatization of standards that accompany several of the other forces of globalization outlined above. Grades and (product and process) standards are taking on greater meaning with the reduction of tariff and similar trade barriers and in light of consumers' (and retail gatekeepers') demands for quality, safety, authenticity, and sustainability. This phenomenon could represent major barriers to entry or continued market access in the form of compliance requirements and costs on the part of emerging market suppliers

What role can agribusiness play in the Caribbean?

Given that current food exports are low, food imports are high, the majority of farmers are small-scale and poor, and current food prices are high, a competitive agribusiness sector can contribute to export-led growth, food import substitution, enhanced food security, employment creation, and poverty reduction. To realize these potentials, however, support must be given to improving the competitiveness of Caribbean agro-food systems and the capabilities to respond to national, regional, and international market opportunities. At the same time, support is also necessary to ensure the remunerative participation of viable poor and small-scale actors in the agro-food markets and provide safety nets for those who are adversely affected by policy reforms and/or structural changes taking place in the agro-food system. Market failure in the region's agriculture markets – the absence of private sector provision of farm inputs, finance, and output purchasing – is both the cause and consequence of low traded volumes, high transaction costs and high risks. Any intervention by governments and CARICOM should be designed to encourage the development of integrated markets to make them more attractive to the private sector

To date, support for agro-industry development has been piecemeal. Agribusiness development in the Caribbean can be expected to be much more efficient and comprehensive if it is placed within a strategic framework following a multi-sectoral systemic approach, taking into account the broader social, technological, and other factors that are re-shaping the agro-food systems worldwide.

Within this context, the role of the CARICOM Secretariat, through this programme, will be to support and promote the development of a market oriented and competitive regional agribusiness sector by (i) providing analytical data on which policy reforms and investment decisions can be made and (ii) supporting capacity development among a wide range of commodity chain stakeholders.,.

Programme rationale

The rationale for this program is based on the following premises:

(i) Well thought-through policy reforms in the sector can achieve more efficient and appropriate levels of investment leading to expanded production, value addition, and/or trade of particular commodities.
(ii) Promotion of any business strategy must be based on sound commercial viability, that is, it must be a profitable activity. Hence, there might be need to divert from certain crops/commodities, especially for less efficient producers.
(iii) While market development should be led by the private sector, government has a key role to play to palliate market failures through well-designed and targeted interventions and regulations.
(iv) A regional approach to the market development issues, based on sound analysis is needed, given the intrinsic and structural challenges facing the sector and the small size of countries' economies taken individually..

Within this context, CARICOM sought the funds to develop and implement this programme.

B. Summary programme description

Programme objectives, expected outputs and outcomes

Objectives

The objectives of the programme are to (i) develop a strategic framework for regional agribusiness development, which includes action plans for targeted commodities; and (ii) promote training and dialogue among national and regional policy makers and relevant private sector stakeholders to advance the agri-business/commodity development agenda.

Outputs

The expected outputs from this program include:

- An Action Plan with concrete recommendations on two key areas (i) developing a regional agribusiness sector and (ii) developing targeted commodity enterprises.
- A database of policy- and investment-relevant "actionable" analysis with regard to agri-business development in the Caribbean[2]
- Technical and policy briefs on targeted themes
- Regional fora of stakeholders to provide targeted training, particularly in the area of commodity group formation and to promote regional cooperation

Outcomes

The expected outcomes from these outputs are:

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[2] Some analytical work has already been undertaken on 5 commodities: coconut, hot peppers, papaya, sweet peppers, and small ruminants for Barbados, Belize, Guyana, Jamaica, St. Lucia, St. Vincent, Trinidad & Tobago.

- Better coordination of pro-agribusiness policy measures and enhanced technical advice to facilitate implementation of commodity action plans
- Increased awareness among producers, agro-processors, exporters of opportunities within domestic and regional markets particularly for targeted commodities
- Enhanced commodity associations
- Increased agro-business investments of regional scope through effective public-private partnerships

Components

This phase of the programme, which is expected to be completed at the end of April 2010, will have three components; (i) Data gathering and analysis (ii) Promotion of stakeholder dialogue and training; and (iii) Support for communication and awareness

Component 1- Data gathering and analysis: Under this component support will be provided for conducting a series of research and analytical work, which are considered necessary to develop the Regional Agribusiness Strategy Paper and Commodity Action Plans. Following is a tentative outline of the thematic areas to be covered by the studies:

(i) **Background data: status of agribusiness and agri-trade of the CARICOM countries**

- Identify the key types of agribusiness in the region and business practices
- Assess status of agriculture and commercial policies
- Collect statistical data on production, consumption, and trade (intra- and extra-regional) for all countries during 2000-2007
- Analyze current trade flows and trade participants, both formal and informal
- Identify commonalities and differences in agricultural trade among CARICOM member states

(ii) **Opportunities and constraints to agro-business development and competitiveness**

- Analyze the barriers to intra- and extra-regional trade, including infrastructure, transport, customs, and policies (tariff and non-tariff barriers, SPS measures and other technical standards, export restrictions, and others), distinguishing between importance of barriers to trade for intra-regional *versus* international trade
- Assess the regulatory and administrative cost burden to developing a competitive regional agribusiness sector
- Evaluate the capacities of institutions that are an integral part of the agribusiness development objective, including ministries of trade, finance,

agriculture, the agencies responsible for food safety and standards, chambers of commerce etc

- Assess status of BDS i.e., to identify the number, type, and quality of existing BDS and assess the need for and use of these services by agricultural entrepreneurs.
- Assess recently signed EPA and its impact on objectives for intra- and extra-regional trade in the selected commodities
- Prioritize the barriers to trade for CARICOM countries, identifying the binding constraints.

(iii) **Commodity value chain assessments** (see box 1 for an initial list of commodities for consideration)

- Market analyses to identify feasible commodities to be supported based on market opportunities
- Value chain analyses of selected commodities to identify opportunities constraints at each stage of the commodity chain (apart from those assessed above) that are specific to the commodity
- Analyse opportunities and potential for product-market linkages – with particular emphasis on value added products – linkages at the national, regional and international levels, including the agro-tourism linkage at the national and regional levels.
- Identify opportunities for creating and taking advantage of economies of scale and specialization (i.e. the natural advantages of countries for producing specific commodities); production integration; and cross border investments

Recommendations

Based on constraints and opportunities identified, provide action-oriented recommendations, particularly with regard to:

- upgrading and strengthening commodity value chains to ensure competitiveness;
- integration of viable SMEs into these value chains; as well as beneficial participation of the poor (as consumers, farmers, agro-processors, and employers) in the process
- risk management instruments; and
- developing/strengthening regional support institutions/services to deal with issues such as food safety and food product an process standards, marketing, and transport

Box 1: Potential list of commodities and rational for choice

A report completed by the ITC and FAO has identified a list of commodities with development potential based on analysis using production, import, export, and world market indicators. Based on their analysis, four categories of products were identified: products with (i) high export & high import substitution potential; (ii) low export and high import substitution potential; (iii) high export and low import substitution potential; and (iv) products with low export and low import substitution potential. While the report is a work in progress, these initial findings can serve as a starting point to select commodities for further analysis. See annex for a more detailed summary of the report's findings. The following commodities were selected for consideration under this programme, based on the findings of this study and work being carried out by regional organizations and initiatives, namely Jagdeo Initiative, CABA, and CARDI: papaya, avocado, mango, ginger, sweet potato, other root and tubers, coconut, cocoa beans, maize, hot peppers, small ruminants. A final list of commodities (as well as the countries that has a comparative advantage in production for each commodity) will be decided, based on national government's priorities, further discussions with stakeholders, and additional field work, which is expected to be outlined in the reception report to be prepared by the firm selected to undertake the studies.

The intent is to collaborate with the on-going related programmes, particularly the EU-ACP agricultural programme and CABA, not only to avoid duplication of efforts but also to ensure economies of scale, given the scope of work/countries to be assessed and the limited resources and timeframe in which the work is expected to be completed.

<u>Component 2 - Promotion of stakeholder dialogue and trainings</u>: This component will support consultations and training workshops targeted to a wide range of stakeholders from the public (particularly policy makers) and private sectors (including producers, agro-processors, and exporters). The main aim is to create an active forum for discussion and decision making; contribution to strategy formulation; and facilitation of partnerships. The data generated from these consultations will contribute to the Strategy Paper and action plans. Additionally, a sub-component will provide support for facilitating linkages between producers and the tourist industry and other domestic markets and for training chain agents to be active participants in the targeted commodity chain. Focus will be on the commodities for which some analytical work has already been completed under this programme (papaya, coconut, sweet potato)

<u>Component 3 – Support for communication and awareness</u>: This component will support the development of information packages and their dissemination to a wide range of stakeholders. These information packages, which will include policy briefs, technical notes, an updated website, are expected to provide a clear and concise outline of the key issues and parameters, improve the quality of our argument, provide a solid grounding for public debate and provide a record to which the main stakeholders need to respond.

Implementation arrangements

The ***programme coordinator (PC)*** will be responsible for overall coordination and oversight of the implementation process.

A ***technical committee*** will be established which, in collaboration with the PC, will (i) provide feedback on the analytical Report and Action Plan; (ii) contribute to the preparation of policy briefs and technical notes; and (iii) contribute to the planning and implementation of stakeholder dialogues. The committee will be comprised of members from both the public and private sectors, including representation from some of the international development agencies. The representative should be in very senior position with a strong technical background. The Committee will be chaired by the CARICOM Secretariat.

A ***national facilitator*** will be selected from each country from the Ministry of Agriculture. The national facilitator will serve as the focal point for data sharing among national stakeholders and facilitate interactions with those stakeholders and the programme team, particularly the PC and the agent/s responsible for undertaking the activities outlined in component one. It is expected that there will be a need for sub-sector coordinating units in each country. These are already being set up in some countries under the EU-ACP agricultural programme and should be used by this programme, where they exist and replicated, as necessary, where they do not.

The PC will work with CARICOM's ***Public Information Unit*** to outline and implement a communication strategy.

C. Synergies between proposed programme and on-going work in the region

Enhancing agriculture food production and increasing intra- and extra-regional trade linkages are key objectives in the regional governments' national and agriculture sector strategies for poverty alleviation and economic growth. The goal and objectives of this programme are also aligned with the regional policies and strategies such as the revised Treaty of Chaguaramas, which outlines the Community Agricultural Policy (Article 56); the regional Food and Nutrition Strategy; and the Regional Transformation Programme. All of these policies and strategies have in common the development of the agriculture sector through increasing efficiency and diversity in primary production and agro-processing; improving consumers' access to healthy and good quality food; increasing incomes of sector participants; promotion of private sector investment and participation; improving the regulatory environment; and export promotion.

This programme also complements other on-going operations and analytical work in the region; including the Jagdeo Initiative, Promoting CARICOM/CARIFORUM food security project; the EU-ACP Agricultural Commodities programme; and Tradecom's commodity assessment project in Guyana/Suriname. During the next several weeks, a more in-depth assessment will be undertaken of the other initiatives in the regions to better able to assess potential for synergies as well as to identify the gaps. (see table 8 for a summary of these programmes).

D. Potential risks and mitigation measures

Nº	Risk	Rating	Mitigation measures
1	The scope of the work, including the number of countries included in analysis, will prove to be too onerous to be completed within the timeframe and budget	Medium	Efforts to identify potential synergies with related programmes that are currently on-going and to collaborate with them are expected to help mitigate this risk, particularly with regard to data gathering. Also, additional sources of funding and technical assistance are being sought to supplement the budget.
2	The possibility that programme outputs are not translated into meaningful technical assistance and investment programs	Low	Stakeholder consultations particularly from the private sector and development partners and, ensuring alignment with regional and national strategic plans and programs will serve to mitigate this risk

References

Donovan, J., & Nigel Poole, *Linking smallholders to markets for non-traditional agricultural products: Review of experiences in the Caribbean*; 2008

FAO; *Agricultural trade policy and food security in the Caribbean: structural issues, multilateral negotiations and competitiveness*; 2007

ITC/FAO; *Trade Opportunity Scan for Caribbean ACP countries* (draft); 2008

World Bank; *Modernizing Africa's Agro-Food Systems: Analytical Framework and Implications for Operations*; 2003

ANNEX

Table 1: Share of agricultural exports in total merchandise exports (%)

Country	1990-1992	2001-2003
Antigua & Barbuda	2.7	0.2
Bahamas	1.8	1.0
Barbados	27.9	28.8
Belize	69.0	64.1
Dominica	67.4	39.7
Dominican Republic	54.8	63.8
Grenada	65.2	40.5
Guyana	42.9	32.9
Haiti	18.4	6.5
Jamaica	21.2	21.3
St. Kitts & Nevis	41.5	10.3
St. Lucia	65.4	68.3
St. Vincent & the Grenadines	77.5	69.4
Suriname	9.7	7.2
Trinidad & Tobago	5.7	5.3

Source: FAOSTAT, 2006, as taken from "Agricultural food policy and food security in the Caribbean;" FAO, 2007

Table 2: Share in world agricultural exports

Regions	Share in world agricultural exports (%)		
	1988	***1994***	***2004***
Developed countries	70.6	71.4	70.5
Developing countries	29.4	28.6	29.5
Asia (developing)	14.6	16.2	14.6
LDCs	0.2	0.2	0.1
Non LDCs	14.4	16.0	14.5
SSA	3.1	2.3	2.1
LDCs	1.3	0.9	0.7
Non LDCs	1.9	1.5	1.4
All LDCs	1.5	1.1	0.8
Near East & North Africa	0.6	0.6	0.6

Caribbean	2.0	0.6	0.3
Oceania (developing)	0.2	0.2	0.1
South America	6.9	7.7	9.6
Central America	2.0	2.0	2.6

Source: FAOSTATS 2005 as taken from "Agricultural food policy and food security in the Caribbean;" FAO, 2007

Table 3: Share of agricultural employment in total employment

Country	Total employment (000)	Agricultural employment (000)	%
Antigua & Barbuda	32	8	25
Bahamas	156	6	3.8
Barbados	147	6	4.1
Belize	83	25	30.1
Dominica	35	8	22.9
Dominican Republic	3,612	603	16.7
Grenada	37	9	24.3
Guyana	319	56	17.6
Haiti	3,458	2,156	62.3
Jamaica	1,284	264	20.6
St. Kitts & Nevis	19	4	21.1
St. Lucia	64	15	23.4
St. Vincent & the Grenadines	50	12	24
Suriname	159	30	18.9
Trinidad & Tobago	573	50	8.7

Source: FAOSTAT 2005, as taken from "Agricultural food policy and food security in the Caribbean;" FAO, 2007

Table 4: Imports as a percentage of domestic supply of selected food groups

Country	Fruit	Milk	Vegetables	Cereals
Antigua & Barbuda	14.7	48.9	15.9	98.7
Bahamas	45.9	95.1	27.1	99.5
Barbados	78.9	78.4	28.5	110.4
Belize	0.3	86.3	25.9	29.2
Dominica	0.1	54.9	9.7	97.7
Dominican Republic	0.9	11.5	1.2	65.0
Grenada	0.4	95.0	18.7	176.2
Guyana	0.5	61.4	14.1	19.5
Haiti	0.0	46.8	3.3	62.0
Jamaica	0.3	80.6	5.9	100
St. Kitts & Nevis	33.8	81.5	68.7	100
St. Lucia	0.6	94.5	76.4	100
St. Vincent & the Grenadines	0.4	86.6	13.8	205.9
Suriname	1.4	35.6	13.8	22.5
Trinidad & Tobago	11.6	95.5	50.4	103.9

Source: FAOSTAT, 2006, as taken from "Agricultural food policy and food security in the Caribbean;" FAO, 2007

Table5 : Percentage of agricultural exports going to major export markets (average 2001-2003)

	CARI COM	EU	USA	Other
Antigua & Barbuda	74.5	4.2	13.8	7.5
Bahamas	0	69.7	27.9	2.4
Barbados	41.8	35.3	12.9	10.1
Belize	13.9	48.5	32.6	5

Dominica	24.7	66.8	2.4	6.1
Dominican Republic	1	19	60	20
Grenada	26.6	55.8	9.5	8.1
Guyana	25.9	63.3	3.4	7.5
St. Kitts & Nevis	6	87.7	1.2	5.1
St. Lucia	28.2	69.1	1.6	1.1
St. Vincent & the Grenadines	48	47.3	1.6	3.2
Trinidad & Tobago	67.6	13.4	8.6	10.4
Total Caribbean	**19.6**	**39.4**	**28.4**	**12.7**

Source: WITS, World Bank, 2005 as taken from "Agricultural food policy and food security in the Caribbean;" FAO, 2007

Table 6: Top agricultural export (1), its percentage in total agricultural exports (2), percentage of production exported (3), percentage shipped (4) to main market (5)

Country	1	**2**	**3**	**4**	**5**
	Product	**2001-03**	**2001-03**	**2002**	**Market**
Antigua & Barbuda	Beverages (dist alcoholic)	31.3	-	76	CARICOM
Bahamas	Beverages (dist alcoholic)	55.4	-	89	EU
Barbados	Sugar (centrifugal, raw)	31.7	92.5	99	EU
Belize	Orange juice (concentrate)	28.3	75.5	99	CARICOM
Dominica	Bananas & Plantains	63.1	75.9	82	EU
Dominican Republic	Cigars (cheroots)	40.6	-	66	USA
Grenada	Nutmeg, mace, cardamons	57.4	89.4	75	EU
Guyana	Sugar (centrifugal, raw)	41.3	94.2	62	EU

Haiti	Mangoes	25.7	3.2	96*	USA
Jamaica	Sugar (centrifugal, raw)	26.6	80.5	100	EU
St. Kitts & Nevis	Sugar	83.8	39.6	99	EU
St. Lucia	Bananas	68.2	38.5	97	EU
St. Vincent & the Grenadines	Bananas	49.8	71.2	85	EU
Suriname	Rice, husked	31.2	99.1	76	EU
Trinidad & Tobago	Beverages (non-alcoholic)	30.9	-	81	CARICOM

*Data for 1992

Source: "Agricultural food policy and food security in the Caribbean;" FAO, 2007

Table 7: Food imports- selected food groups (kg/person/yr)

Country	Cereals & products excl beer			Meat (slaughtered) & products			Fruit & products (excl wine)			Vegetables & products			Milk & products		
	1969-1971	*1990-1992*	*2001-2003*	*1969-1971*	*1990-1992*	*2001-2003*	*1969-1971*	*1990-1992*	*2001-2003*	*1969-1971*	*1990-1992*	*2001-2003*	*1969-1971*	*1990-1992*	*2001-2003*
Antigua & Barbuda	95	101	82	27	76	52	31	29	47	14	38	10	46	77	70
Bahamas	118	107	118	84	97	101	66	119	215	45	60	54	142	129	99
Barbados	137	285	272	51	43	37	49	72	119	13	14	32	115	86	106
Belize	100	99	115	18	16	8	6	9	14	9	11	21	116	147	78
Dominica	78	117	109	20	48	57	7	16	10	5	10	14	46	95	110
Dominican Republic	25	106	164	0	0	0	1	1	4	1	1	2	19	29	9
Grenada	104	211	324	18	48	81	6	27	40	5	8	12	72	148	144
Guyana	72	78	92	4	6	6	5	0	13	5	0	39	50	14	69
Haiti	10	48	79	0	0	4	0	0	1	0	1	2	4	9	8
Jamaica	157	172	222	11	13	16	5	3	18	4	2	9	61	42	41
St. Kitts & Nevis	110	163	163	21	75	126	4	41	87	7	22	58	87	109	138
St. Lucia	90	156	182	20	68	86	17	55	71	5	16	25	48	105	144
St. Vincent & the Grenadines	93	342	297	11	53	64	2	10	35	3	2	8	72	70	84
Suriname	85	137	108	12	3	29	3	1	4	9	10	18	25	46	24
Trinidad & Tobago	192	213	201	9	9	12	11	41	32	8	16	22	115	96	103

Source: FAOSTAT, 2006, as taken from "Agricultural food policy and food security in the Caribbean;" FAO, 2007

Table 8: List of related on-going programmes (incomplete)

Programme	Commodity targeted	Country/ Region	Area of Intervention																	
			Analysis,& strategy formulation			Input markets	Product development	Product-market linkages	Market Info Systems	Marketing systems	Food quality & safety standards	BDS	Access to finance	Infrastructure			Capacity building			
			commodity	policy	Institutions									storage	Processing facilities	transport	farmers	associations	exporters	processors
EU-CARICOM Agribusiness Development		CARICOM countries	*	*	*			*									*	*	*	*
Jagdeo Initiative		CARICOM countries																		
CARICOM-CARIFOURM Food Security project		CARIFORUM countries								*	*						*			
EU-ACP Agricultural Commodities Programme		CARIFORUM countries	*	*	*			*	*	*	*						*	*	*	*
TradeCom Commodity Studies		Guyana	*	*																