

31 MARCH 2022

Session n°5:

Agriculture Trade : opportunities for SMEs and businesses in export markets



Caribbean Agrifood Business Series ...

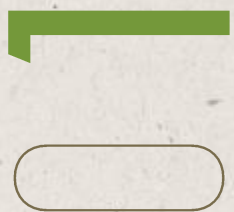




Market Study of Fruit and Vegetables from ACP- Caribbean Countries

IICA-COLEACP CARIBBEAN AGRIFOOD BUSINESS SESSION N°5
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COLEACP

Market Insights

Department

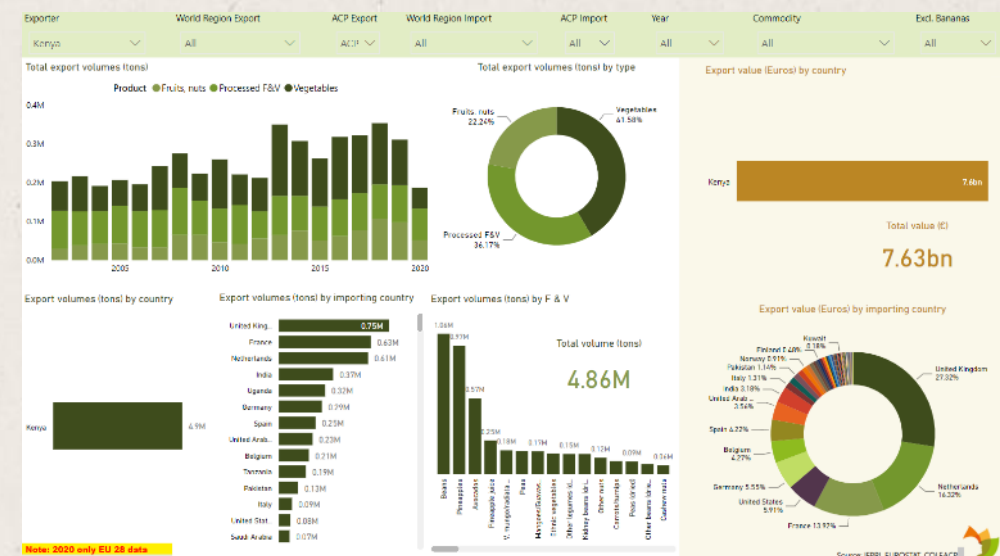
Market Insights

To Provide Information

- Qualitative and quantitative
- To understand trade trends in different markets
- To support action plans at the service of SMEs in the agricultural industry (mainly Fruits & Vegetables)



Activities financed by programmes (mainly by EU and OACPS)





Market Study of Fruit and Vegetables from ACP- Caribbean Countries

Scope and Methodology

Scope

- Geographical scope:
 - 16 ACP-Caribbean countries, **5 focus countries**:
 - Dominican Republic, Guyana, Jamaica, Suriname and Trinidad & Tobago
- Products scope (HS 08,07,09,20):
 - Fruits
 - Vegetables
 - Spices
 - Processed products
- Content:
 - Production
 - Imports/Exports
 - Effects of external phenomena on consumer trends and trade
 - SWOT



Methodology

- Due to COVID-19 mainly **remotely** but with part of the team being based on the Caribbean islands + interviews with local stakeholders
- **Data:** EUROSTAT, International Food Policy Research Institute (IFPRI), Centre d'Etudes Prospectives et d'Informations Internationales (CEPII) BACI, Food and Agriculture Organization Corporate Statistical Database (FAOSTAT), World Bank Open Data, and local government websites
 - Separate analysis for UK
- **General aspects** have been considered as COVID-19 impact, climate change, international regulations, and logistics.
- **Local policies** and incentives from governments and Caribbean Community (CARICOM) approach are also considered
- Internal will to be **macroeconomic but also operational** for SMEs



Market Study of Fruit and Vegetables from ACP-Caribbean Countries

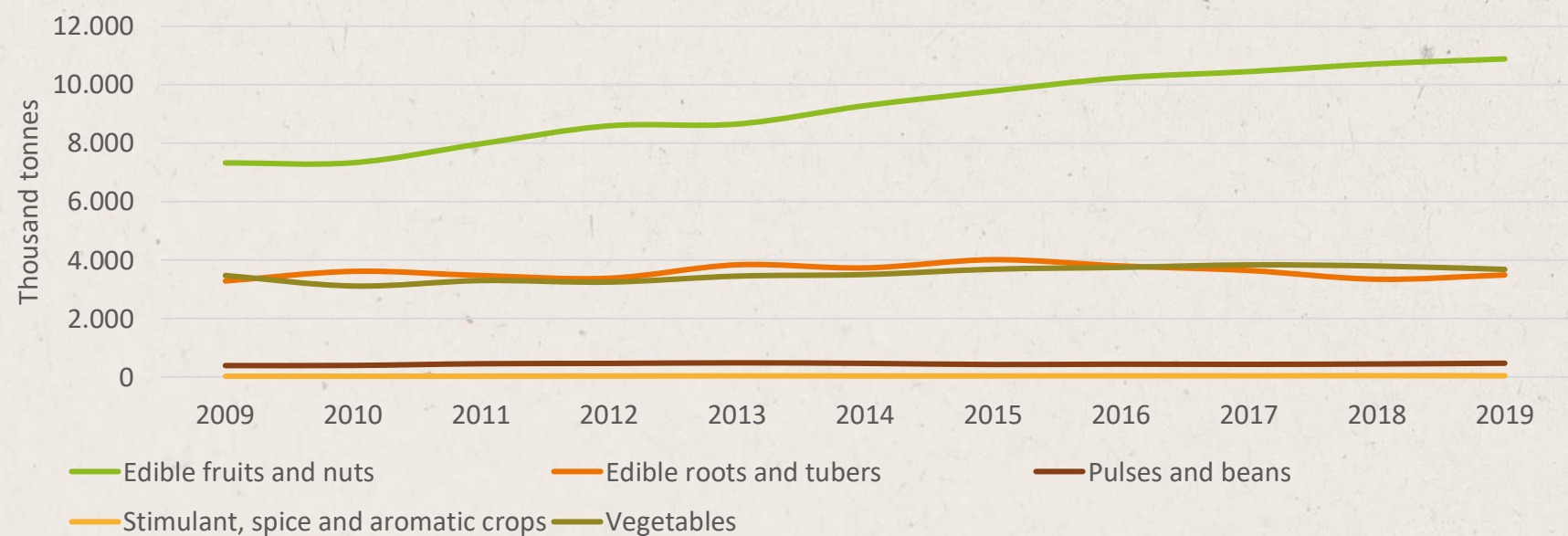
Results

RESULTS : Production

- 4 leading producers :
- Positive production trends for fruit and nuts
 - Mainly driven by Banana, Avocado, Pineapple, Papaya
 - Opposite trend for Citrus and Grapefruit
 - Focus on 20 crops

Production per ACP-Caribbean country in volume, 2019 and growth (based on linear trend), 2009–2019

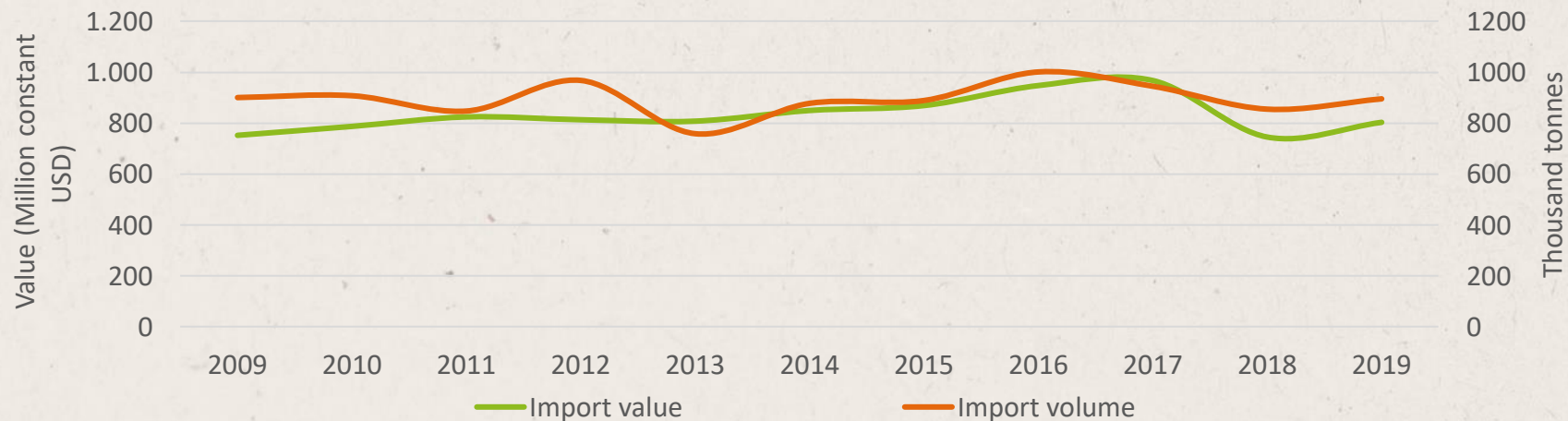
Country	Production 2019 (1,000 tonnes)	Growth (2009–2019)
Dominican Republic	7,209	129%
Cuba	6,023	–3%
Haiti	2,702	–2%
Jamaica	1,039	–2%



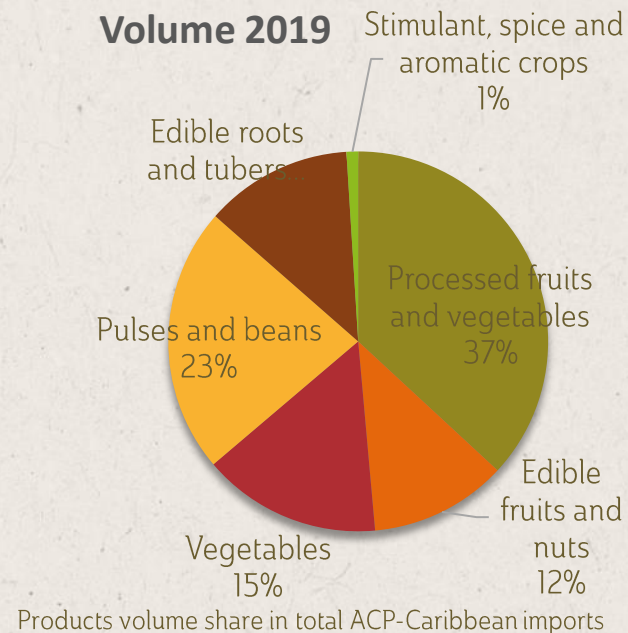
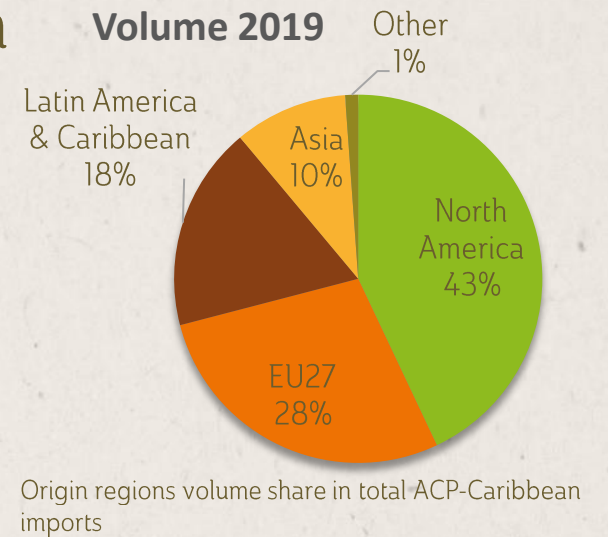
Trends in ACP-Caribbean production per category (1,000 tonnes), 2009–2019 (Source: COLEACP based on FAOSTAT)

RESULTS : Imports in the Caribbean

- 4 leading suppliers : USA + Canada + Netherlands + China
- Main imported products :
 - North America: fresh/frozen potato, dried pulses and beans, apples, grapes, apple juice,...
 - EU: fresh/frozen potato, onions,...
 - China: tomato products, garlic, beans
 - Internally: juices, coconuts, legumes



Trends in ACP-Caribbean imports of horticultural products included in this study (2009–2019). Note that the trend in value is corrected for inflation. (Source: COLEACP based on Eurostat and CEPII BACI)



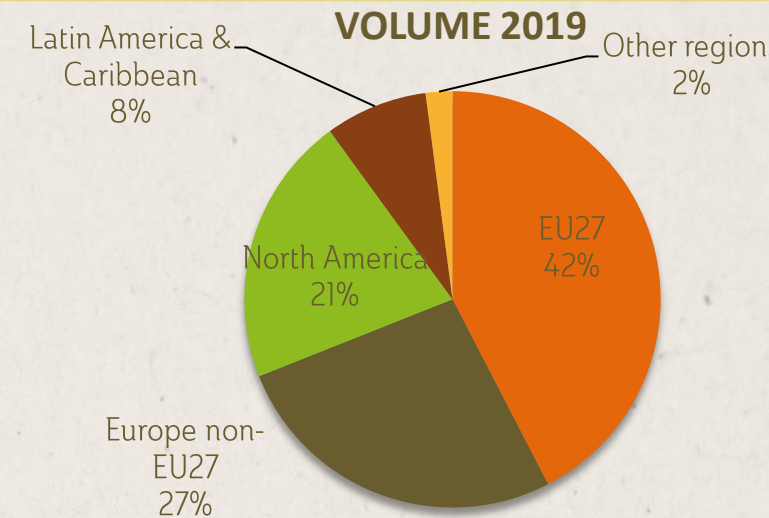
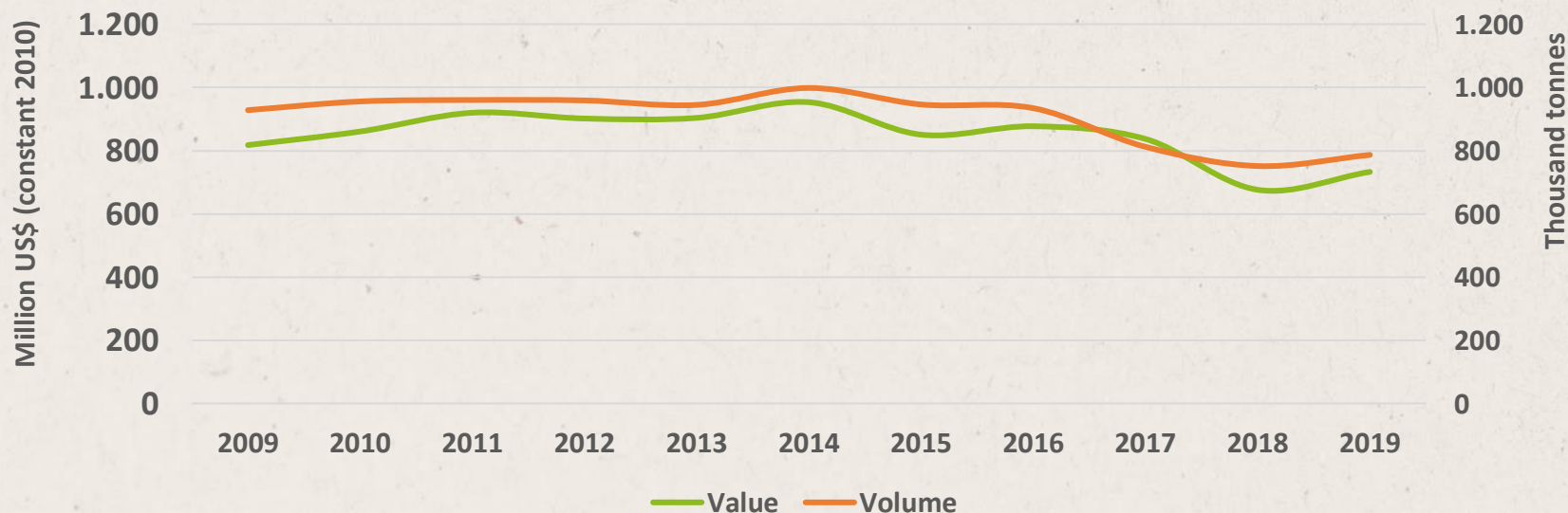
RESULTS : Exports from the

Caribbean

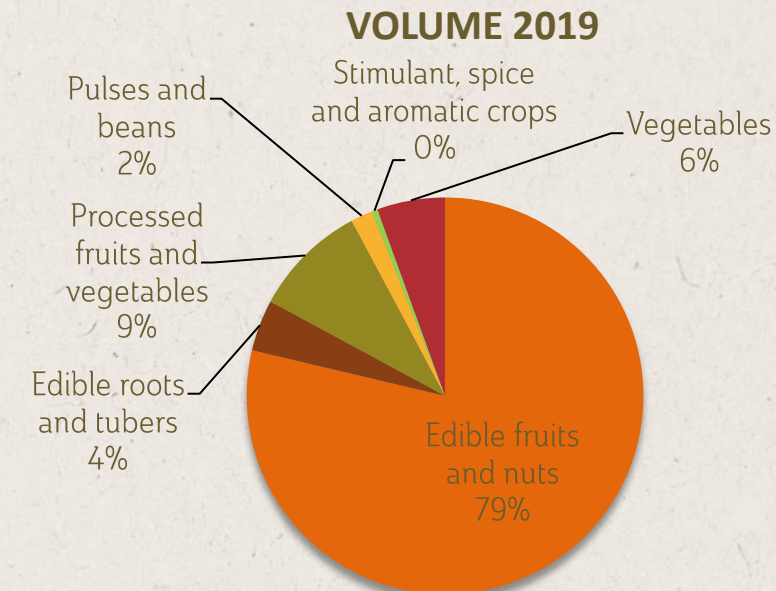
- Three leading export markets : UK + USA and EU27
- One leading product/Country : Banana/Dom. Rep.

However :

- Diversification of destinations → shift from UK+USA to EU27:
(65% in 2002 ; 55% in 2008 ; less than 50% in 2019)
- Value chains in progress :
Avocado, Mango, Ethnic roots and vegetables, Organic products (from Dominican Republic)



Destination region share in total ACP-Caribbean exports



Product volume share in total ACP-Caribbean exports

RESULTS : Main Market Opportunities

All markets

- F&V **consumption is increasing** on all markets.
- Opportunity for the Caribbean to continue the **diversification of exports**.

Domestic/regional markets

- **Processed F&V**: cassava, coco water, herbs and spices, pickled gherkins and hot pepper sauces targeting the **large Caribbean population**.
- **Prepared fruit and vegetables** (salad fruits – melons, pineapples; romaine and iceberg lettuce, peppers, broccoli, cauliflower...) targeting the **tourism sector**.
- **Substitution to the imports** (tomato produces, juices, pulses...) but also roots and tubers for import **substitution of white potato** including frozen products such as French fries by cassava, sweet potato, and domestically produced white potatoes.

International markets

- Avocado, pineapple, banana, coconut, mango, sweet potato, ethnic roots.
- Organic fruit and vegetables.

RESULTS : Main Market Opportunities

Crops \ Market		Domestic	Regional	International
Fruits	Banana	C	C	CO
	Avocado	C	O	CO
	Mango	C	O	CO
	Pineapple	C O	O	O
	Other /ethnic fruits	C O	O	C O
	Coconut	C O	CO	O
Vegetables	Beans & other pulses	C O	O	
	Fresh ethnic vegetables	C O	O	C O
	Roots & tubers	CO	C O	O
	Capsicum Pepper	C	C O	C O
Processed	Bananas	C O	C O	O
	Fruit juices	C O	C O	O
	Pumpkin	O		
	Coconut	C O	C O	O
	Dried fruits	O	O	C O
	Root and Tubers	C O	C O	O
	Tomato	C	C O	
Spices	Purees and condiments	C	C	C O
	Aromatic crops	O	O	CO

Caption: C = currently well-established; O = opportunity

4



Access to the Study

Contact

Downloading the Market Study

The Market study is available via:
<https://forms.office.com/r/DRm5N7bc4f>



For questions, don't hesitate to contact us
via: entrepreneursacp@coleacp.org

COLEACP services in support of export markets

Trainings for:

- Companies, SMEs
- Public sector

Technical Assistance:

- Tailor-made support for companies (on demand) & ecosystem (consultants, prof. org., farmer org., competent authorities etc.)

Business Development:

- Participation to fairs, B2Bs

Agrifood Sessions (mapping entrepreneurs and markets)

<https://www.coleacp.org>



Thank you
Gracias
Merci





The IICA-COLEACP Caribbean Agrifood Business Series focuses on innovations and successes of Caribbean farmer-led businesses and SMEs. These activities are supported by the Fit For Market SPS programme, implemented by COLEACP within the Framework of Development Cooperation between the Organisation of African, Caribbean and Pacific States (OACPS) and the European Union.



Thank you

