CARIFORUM-EU Economic Partnership Agreement:
A Firm-Level Review Focused on Trade and Investment

Report prepared for Caribbean Export Development Agency

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October 2019

List of Abbreviations

B2B	Business-to-Business
BAC	British Agri-Consortium
BRC	British Retail Consortium
BSO	Business support organization
CDB	Caribbean Development Bank
CARIBBEAN EXPORT	Caribbean Export Development Agency
CARIFORUM	CARIFORUM
CSS	Contractual service suppliers
DFID	Department of International Development – UK
ECLAC	Economic Commission for Latin America and the Caribbean
EDF	European Development Fund
EPA	Economic Partnership Agreement
EC	European Commission
EU	European Union
FCOR	French Caribbean Outermost Regions
GDP	Gross Domestic Product
HS	Harmonized System (for classification of goods by customs)
IDB	Inter-American Development Bank
IPs	Independent Professionals
IT	Information technology
ITC	International Trade Centre
MSMEs	Micro, small and medium-size enterprises
OECS	Organisation of Eastern Caribbean States
SME	Small and Medium -size Enterprise
TPO	Trade promotion organization
TRTA	Trade-Related Technical Assistance
UK	United Kingdom
WTO	World Trade Organization

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1.0 INTRODUCTION

1.1 Background

The overall objective of this assignment was the preparation of a firm-level review of the CARIFORUM-EU Economic Partnership Agreement (EPA), that identifies challenges and successes as well as recommendations that will be the basis for discussions at the 4th CARIFORUM-EU Business Forum in Frankfurt. It is expected that the dialogue should result in the development of strategies for tackling the challenges identified and improving the CARIFORUM-EU trade and investment relationship.

The study included a general review of the trade and investment environment in CARIFORUM, including:

- An overview of trade and investment patterns in the priority sectors over the past ten years or period with available data;
- The current production systems in the priority sectors;
- Regulatory impediments to business development;
- The overall investment regime and incentives available for investment;
- Export incentives and development programmes directed at the priority sectors;
- Other relevant issues that impact on the trade and investment relations

A specific purpose of the research was to detail the experiences of CARIFORUM (CARIFORUM) goods and services producers, in the priority sectors of **agro-processed foods, natural ingredients and the creative industries,** that have successfully exported to the EU. Additionally, the exercise intended to detail the experiences of European and Caribbean investors that have invested since 2008 in the respective regions, with a focus on the priority sectors of **agri-business, hotel and resort development, renewable energy and outsourcing.** This firm-level review of the EPA was expected to identify the challenges or impediments as well as the successes of these firms and offer recommendations for increasing trade and investment between CARIFORUM and the EU going forward.

Methodology

The methodology in this assignment was two-fold: secondary (desk-based) and primary research (interviews with stakeholders in the Caribbean and EU). The consultant first reviewed previous reports dealing with CARIFORUM-EU trade and investment issues. A list of documents consulted is in the References.

The consultant also developed lists of persons/companies to interview on the Caribbean and European sides. Companies that participated in the interviews included 6 companies in the natural ingredients sector; 12 companies in the agro-processed sector, including 5 rum companies; and 7 companies in the cultural and creative industries. Additionally, 5 companies in the agro-processed sector submitted written responses to the interview questions. Interview requests were additionally sent to another 38 companies from the priority sectors in the region. The list was comprised of companies that participated in market research for the 3rd CARIFORUM-EU Business Forum (i.e. cocoa, herbs and spices), as well as companies that have participated in other Caribbean Export initiatives. As a result, interviews were undertaken with another 3 companies in the natural ingredients sector. See Annex IV for a list of the companies and persons surveyed or interviewed.

An attempt was made to contact and interview at least 5 entities in each of the areas on the EU side but there was only limited success in that regard. This may suggest that there is very little interest by European companies in the Caribbean (goods or services) beyond the firms or companies or service professionals that are currently engaged in trade with the region. It was also particularly difficult to get contact information for individuals in companies because of the EU's data protection rules.[1] This was most distinct in the case of trying to reach EU investors in the Caribbean. A total of twenty two (22) EU companies were interviewed. Only two of the companies interviewed indicated that they would attend the CARIFORUM-EU Business Forum in Frankfurt. Some pointed out that they have their own, experience-based channels for importing products. But they all expressed interest in getting information about Caribbean suppliers of goods and services.

Structure of Report

This report consists of three parts: (i) an exposition of the trade and investment relationship between CARIFORUM and the EU; (ii) a summary of findings from interviews with Caribbean exporters of goods and services, EU importers of products from the region, Caribbean investors in the EU, and European investors in the Caribbean; and (iii) recommendations for improving trade and investment in the bilateral economic relationship.

2.0 OVERVIEW OF CARIFORUM-EU TRADE & INVESTMENT

2.1 The Main EU-CARIFORUM Trade Trends

The EPA between the European Union (EU) and CARIFORUM states (CARIFORUM) provides for duty free and quota free access for goods of Caribbean origin in the EU and UK market. It also granted significant new market access for trade in services from CARIFORUM, including 29 service sectors for employees of CARIFORUM services firms (as contractual service suppliers, - CSS) and 11 sectors as Independent Professionals (IPs). Nevertheless, since 2008, CARIFORUM merchandise trade with both the European Union (EU) and the United Kingdom (UK) had declined significantly; and there has been very little increase or diversification of trade in services exports by CARIFORUM economies. The reasons for this are manifold and will be explored later in this report.

Table 1: Value of United Kingdom Total Merchandise Imports from CARIFORUM

	2008	2013	2014	2015	2016	2017
Antigua and Barbuda	46,099,108	5,496,973	762,507	4,052,493	27,910,435	3,831,135
Bahamas	36,252,746	4,317,450	5,855,549	6,556,098	8,321,395	6,155,945
Barbados	20,656,858	11,026,618	6,043,843	5,540,566	8,774,105	6, 863,553
Belize	54,011,924	72,223,351	57,991,549	82,223,087	54,029,153	54,106,438
Dominica	5,667,364	1,426,787	1,573,114	486,199	606,958	891,164
Dominican Republic	80,747,927	135,487,885	134,771,437	129,183,236	161,441,307	128,434,458
Grenada	4,101,876	417,866	876,187	447,048	628,692	554,096
Guyana	75,691,097	70,055,879	61,999,690	55,966,993	29,551,407	54,487,567
Haiti	2,245,301	3,302,530	3,676,296	2,068,990	3,191,789	6,024,840
Jamaica	124,077,478	57,750,311	51,106,669	53,179,555	40,263,251	63,157,891
St Kitts and Nevis	764,170	137,498	140,495	214,091	195,288	250,950
St Lucia	16,663,048	7,726,163	5,930,095	5,624,251	5,397,590	6,349,274
St Vincent and the Grenadines	4,489,151	807,865	720,113	2,923,923	658,413	933,919
Suriname	462,356	655,563	262,605	282,977	994,395	340,141

[1] In practice, one has to get written permission from people in the EU in order to share their personal information such as telephone numbers and email addresses.

	2008	2013	2014	2015	2016	2017
Trinidad and Tobago	190,423,859	121,185,842	153,934,051	119,608,836	64,348,013	123,624,090
TOTAL	**662,354,263**	**492,018,581**	**485,644,200**	**468,358,343**	**406,312,191**	**449,141,908**

Source: HM Revenue & Customs / UK Trade Info - Values in (£)

Table 1 summarizes total goods imports by the UK from each CARIFORUM economy for the past five years and a base year of 2008. It shows the extent to which CARIFORUM goods exports to the UK have declined in recent years and since the EPA was signed. In value terms, UK goods imports from CARIFORUM in 2017 was 32% less than in 2008. [2] It should also be stressed that in 2016, 93% of CARIFORUM goods exports to the United Kingdom came from 5 countries, and over 70% from just 3 sectors: bananas, sugar, oil & gas derivatives. Most CARIFORUM goods exports to the rest of the EU pass through the UK so accurate export figures from CARIFORUM to individual EU markets are difficult to obtain.

Furthermore, Table 2 shows a similar declining trend in CARIFORUM trade (total exports) with the EU-28 in general. A further characteristic is the erratic or inconsistent pattern of exports from most of the Caribbean, especially CARICOM economies. Table 2 reveals EU-CARIFORUM merchandise trade with a €1.5 billion surplus for the EU in 2017 compared to a deficit of €1.5 billion in 2008 (when the EPA was signed). Much of this may be due to reduced prices (or volumes) of natural resource products, and petrochemicals from Trinidad and Tobago and reduction in banana and sugar exports. *A detailed breakdown of EU-CARIFORUM merchandise trade by product groups is attached in Annex II.*

Table 2: Total EU Merchandise Trade with CARIFORUM countries (€ million)

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Imports	5,584	3,949	3,867	3,924	3,634	4,409	4,057	4,043	3,176	3,569
Exports	4,090	3,332	4,338	3,484	4,231	4,222	4,159	5,270	4,970	5,130
EU Trade balance	-1,494	- 617	471	- 440	597	- 187	102	1,227	1,794	1,561

Source: DG Trade, European Commission

Table 3: EU, Trade with ACP- Caribbean Countries – Key Figures (€ million)

Indicator	Unit	Period	Imports	Exports	Total trade	Balance
Last year	Mio euros	2018	4,279	7,546	11,825	3,268
Share in EU trade	%	2018	0.2	0.4	0.3	
Annual growth rate	%	2017-2018	5.9	4.7		
Annual average growth rate	%	2014-2018	-1.4	6.8		

Source: DG Trade, European Commission

On a positive note, Table 3 highlights an annual growth rate of 5.9% in imports and 4.7% in exports over the period 2017-2018.

[2] Mirror data from the UK (imports) is being used as exports from CARIFORUM because national data was not available from CF states.

Apart from the Dominican Republic (to some extent), CARIFORUM economies have not been exploiting the EPA's generous market access preferences. In fact, in trade with the EU, the Dominican Republic plays a major role accounting for 25% of CARIFORUM exports and 34% of imports from the EU.[3] CARIFORUM exports a limited range of products to EU markets and the widest range is still agricultural products, including some processed food products. It is only Belize, Dominican Republic, Guyana, Suriname and Trinidad and Tobago whose total goods exports are higher than services exports.

In the past 20 years, little has changed in the overall structure of CARIFORUM exports. The resource-rich, larger countries still export predominantly goods rather than services; and the smaller economies in the OECS, Barbados and the Bahamas export mainly services (principally tourism-related). But Jamaica's export structure shows its transition to a services-based economy in recent years. Services now comprise 70% of its total exports compared to 60% in 2002.

An ILO survey of gender and work in five Caribbean countries revealed that generally speaking more women are employed in service industries but there are significant differences in the types of service occupations across countries. Evidence from Guyana, Jamaica and Saint Lucia shows that women are now the majority of highly-skilled employees in each country. Women are increasingly entering managerial positions, and are entering senior positions within organisations. Over half of managers in Jamaica and Saint Lucia are women; but the larger the company it is less likely that the top management is female.[4]

The Five-Year Review of the EPA found that most of CARIFORUM exports (in terms of value) were concentrated in the mineral and traditional commodity product groups.[5] With the exception of goods originating from the Dominican Republic (including certain textiles, medical supplies and electronic equipment, etc.), there were few new products exported to the EU. This is the same pattern evident in the merchandise trade data for 2007-2017 in Annex II.

The regional export promotion agency, Caribbean Export Development Agency reported in 2017 that it implemented some 270 program-based activities from which 6,395 persons from CARIFORUM participated in or benefited from the Agency's 270 program-based activities. A total of 3,025 firms and 125 business support organizations (BSOs) also benefitted from programs implemented over the previous five years. The overall aim was to help firms take advantage of the EPA. In spite of this, one of the causes of low export growth is the low level of investment in most CARIFORUM economies outside the tourism sector and natural resource industries. Therefore, some attention will have to be paid to the link between inward investment and export development under the EPA.[6]

The Caribbean continues to be significantly challenged in diversifying exports to UK or EU markets. This was noted in the 5-year review of the EPA . The declining export figures for the past 10 years reflects the fact that the high volumes of commodities (sugar, bananas) have not been replaced by high-value processed or manufactured products. Another clear pattern in the trading relationship is

[3] Agnieszka Osiecka, Dominican Republic's Trade Exchanges (2008-1st half of 2017). EU Delegation to the Dominican Republic, November 8, 2017.
[4] International Labour Organization, Gender at Work in the Caribbean: The Synthesis Report. Geneva: ILO, 2018.
5 B&S Europe and LINPICO. Monitoring the Implementation and Results of the CARIFORUM-EC EPA Agreement: Final Report. (Prepared for the CARIFORUM Secretariat), September 2014.
[6] The ECLAC reported that in the Caribbean, total FDI inflows were up by 20% in 2016-17, to US$ 5.835 billion but over half this sum went to the Dominican Republic alone.

the inconsistent trend in goods exports. This is clearly evident in the bilateral trade data between the UK and individual CARIFORUM states in Annex F.

Furthermore, even tourism, the biggest export and largest sector in the region with the greatest employment (excluding the public sector) does not seem to be reaping trade benefits from the EPA. Table 6 shows Total Tourism Arrivals versus EU Tourists in CARIFORUM states from 2008 to 2016. **It reveals a decrease in EU arrivals in eight countries while total tourism arrivals increased in all but five countries. Total tourist arrivals in CARIFORUM increased by 30% over the period but tourist arrivals from the EU decreased by 3%. And EU tourists as a percentage of total tourists in CARIFORUM decreased from 25% in 2008 to 18 % in 2016.**

There are many contributing factors to this decrease in EU stay-over tourists in the Caribbean, including decreasing price competitiveness of the tourism markets in the region. But the increase in tourism arrivals from other countries seems to indicate that European interest in the Caribbean is declining. The discriminatory airline passenger duty (APD) or tax by the UK government on long haul travel to the Caribbean (but not to the US) negatively affected outbound UK tourism to the Caribbean. Another reason could be the need by EU tourists for experiential tourism and the requirement of the Caribbean to improve its tourism offering. Declining tourism exports from the EU coupled with significant decreases in merchandise exports is worsening the trade deficit of most CARIFORUM states.

2.2 Investment in CARIFORUM

While detailed data is unavailable, it is generally believed that the greatest amount of foreign direct investment (FDI) from Europe goes to the Dominican Republic. Data from the Financial Times revealed that for the period January 2015 to January 2019, of the 24 reported FDI projects that were started in the Caribbean, 10 were in the Dominican Republic at a total value of about US$660 million. They included solar power generation, manufacturing, hotels, medical equipment & supplies, telecommunication services and Internet publishing & broadcasting. And the countries of origin of the investors included Germany, Ireland, Italy, the Netherlands, and Spain. Furthermore, from January 2009 to February 2019, 70 of the 142 FDI projects in the Caribbean went to the Dominican Republic.
This is consistent with the trend in total FDI from all sources into the Caribbean as reported by ECLAC. Table 3 shows total inward FDI in CARIFORUM from all sources and the big economies.

Table 4: FDI Inflows to the Caribbean (US$ millions)

	2011	2012	2013	2014	2015	2016	2017	2018
Caribbean	**5,377**	**4,566**	**4,399**	**8,734**	**5,580**	**5,684**	**6,349**	**5,623**
Bahamas	1,409	1,034	1,590	3,551	865	1,260	901	947
Dominican Republic	2,277	3,142	1,991	2,209	2,205	2,407	3,571	2,535
Jamaica	218	413	545	582	925	928	889	775
Trinidad & Tobago	41	-1,904	-1,130	661	194	-24	-457	-180

Source: ECLAC, Foreign Direct Investment in Latin American and the Caribbean 2019

2.3 Overview of EU-CARIFORUM trade in the products targeted in the 4th Business Forum

Trade data obtained from Eurostat on EU imports of the range of products of interest to CARIFORUM producers that will attend the 4th CARIFORUM-EU Business Forum is contained in Annex I. They relate to the following product groups:

HS 071490 - arrowroot, salep, jerusalem artichokes and similar roots and tubers with high starch or inulin content;
HS 091030 Turmeric 'Curcuma';
HS 1513 - Coconut "copra", palm kernel or babassu oil and fractions thereof, whether or not refined, but not chemically modified.
HS 151530 - Castor oil and fractions thereof, whether or not refined, but not chemically modified
HS 1806 - Chocolate and other food preparations containing cocoa
HS 21039090 - Sauces and preparations thereof, mixed condiments and mixed seasonings;
HS 3304 - beauty or make-up preparations and preparations for the care of the skin, incl. sunscreen or suntan preparations (excl. medicaments); manicure or pedicure preparations;
HS 3305 - Preparations for use on the hair
HS 33051000 - Shampoos
HS 3401 - Soap; organic surface-active products and preparations for use as soap, in the form of bars, cakes, moulded pieces or shapes

What is evident from the data is that **except for Sauces and Preparations (HS 21039090), export volumes are not consistent**. Jamaica is the largest exporter of sauces and seasonings and similar preparations, with an increasing trend, while the Dominican Republic is next. Exports from all the other CARIFORUM states seem haphazard and may reflect supply side issues. But it should also be noted that during the period (2014-18) total EU imports of sauces and seasonings and similar preparations (globally) increased by almost 23% from about 427 million to 523 million euros. So, there is clearly potential to increase exports in this market segment. It is not clear however that there is capacity in the CARIFORUM region to produce natural ingredients in sufficient quantities and with consistent qualities for manufacturing processes in Europe. The only country that exports essential oils in significant amounts is Haiti (e.g. Vetiver oil).

Rum shows an increasing trend in terms of overall EU imports from CARIFORUM.[7] Table 5 shows EU imports of rum and related products from CARIFORUM which increased by almost 31% (in value) from 2014 to 2018. The Dominican Republic is the largest rum exporter in CARIFORUM with almost 7 times the value of rum exports of Jamaica. In 2018 it exported almost 70 million euros in rum products to the EU, a 32% increase from 2014. However, exports from the smaller economies in the OECS are inconsistent.

Table 5: EU Imports of Rum & Other Products Distilled from Fermented Sugar Cane
(Euros)

	2014	2015	2016	2017	2018
Dominican Republic	52,710,808	62,362,105	65,495,107	68,386,649	69,756,960
Guyana	10,440,286	8,362,707	6,599,944	7,858,419	10,397,892
Jamaica	7,715,599	8,377,982	9,151,412	14,145,770	13,966,142
Trinidad & Tobago	9,017,979	5,378,990	18,033,607	8,017,242	8,590,111
Barbados	6,599,427	10,073,595	12,575,454	11,952,154	10,318,013
Haiti	191,441	207,110	208,469	172,880	648,332
Bahamas	416,192	1,325,192	1,867,891	1,948,110	19,387
Belize	79,987	255,857	121,226	105,256	304,048
Antigua & Barbuda	6,887	4,928	129,028	67,403	121,833
Dominica	4,236	12,992	-	1,904	28,293
Grenada	43,308	92,656	62,577	129,133	21,597
St. Lucia	571,191	705,758	714,410	531,325	632,058
St. Kitts and Nevis	37,467	36,973	-	-	36,961
St. Vincent & the Grenadines	5,888	9,910	6,816	15,711	-
TOTAL	**87,840,696**	**97,206,755**	**114,965,991**	**113,160,653**	**114,841,627**

Source: https://madb.europa.eu/madb/statistical_form.htm

[7] The Caribbean rum industry is long established and multinational companies have bought into several companies and this may have improved global distribution channels.

2.4 Summary of the Issues Constraining CARIFORUM Exports to the EU

The data would seem to indicate that the CARIFORUM group is not taking significant advantage of EPA preferences in the UK or EU markets in the case of goods and services, with the exception of the Dominican Republic as it relates to merchandise trade exports. - As one Chamber of Commerce representative in the OECS succinctly summed it up:

> "The market entry regulations or requirements that exist are beyond a lot of our local companies as they are very complex in both products and services".

In the case of **merchandise trade**, the constraints faced by the mainly small firms in CARIFORUM are many. Numerous previous studies have analysed the factors affecting exports from the Caribbean. They can be categorized as follows:

1. Firms in CARIFORUM are mainly small companies with very limited capital and human resources that operate in fragmented markets with high input costs (energy, infrastructure) and relatively low labour productivity reducing their global competitiveness;
2. Shipping rates are often very costly, rendering the cost of Caribbean products uncompetitive. Some buyers indicated that due to the small market, they buy 1-2 pallets of goods and it takes too long for these to reach Europe. They are not able to import full containers from the Caribbean. Air freight is expensive for small shipments and consolidation is currently used but requires significant planning, organisation and follow up with relevant suppliers;
3. The high cost of visibility i.e. cost of undertaking promotions, shelf positioning and the high cost of shelf space; shelf-ready packaging requirements and penalties. Attending trade shows and mounting exhibits is prohibitive for small producers who often have little to no budget for those activities. There is a need for better communication to customers and potential customers of products, availability, outlets, and cost.
4. The difficulty of meeting changing standards and technical regulations and increasing costs regarding labelling and packaging of products;[8]
5. The need for on-the-ground research and provision of services to enable exporters to be pro-active.
6. The inability of most Caribbean countries to implement food safety regulations and food testing facilities to address UK/EU regulatory requirements for the importation of foodstuff, especially dairy, poultry and other meats. EU standards are either based on international standards or higher;
7. More recently, private standards have become more important in terms of de facto market access. They are part of commercial agreements between voluntary parties in a free market, and as such are not subject to state intervention and fall outside the jurisdiction of trade rules. This is the case of the Fair Trade International standard[9] and Global G.A.P.[10] and the British Retail Consortium (BRC) global standards.[11] Private, voluntary standards can have a very strong impact on international trade as entry barriers, this is because the private sector often sets standards that supersede public ones;

[8] It is not surprising that the Fair Trade Advocacy Office recently expressed concern to the CF-EU Joint Consultative Committee about the impact that the changes in Regulation (EU) 2018/848 on organic agriculture could have on small farmers from the Caribbean. The new regulation replaces the current import regime based on "equivalence" to a need to prove "full compliance" with EU rules and list of authorized substances.

[9] https://www.fairtrade.net/standards.html

[10] https://www.globalgap.org/uk_en/

[11] https://www.brcglobalstandards.com/

8. Absence of robust trade representation in the UK or other EU markets presents a challenge and results in ad-hoc approaches to data gathering and gathering of market intelligence, identifying successful market strategies, and the promotion of products in the market. CARIFORUM diplomatic missions do not perform market intelligence or commercial information gathering functions like the missions of the US or Canada.

In the case of **trade in services,** the reasons for the lacklustre performance of the Caribbean are also manifold. Some of the key ones are listed below:

1. Small size of firms – The services sector tends to be comprised of micro and small businesses that do not have a wide range of resources available to them and may often not have the general business skills needed to export successfully (apart from the technical knowledge related to the sector itself);
2. Competitiveness – Services providers typically need to both enhance the standard of their offerings and develop new skills to be able to export successfully. These skills need to be developed in-house to reduce the costs of outsourcing. Training in the general skills required to export as well as advanced sector specific training is not readily available nationally in some CARIFORUM countries;
3. Market Intelligence – The services sector is very fluid and can change quickly. This makes timely market intelligence difficult to obtain. Without this information firms are unable to make sound business decisions;
4. Establishing Credibility – Due to the intangible nature of services, services providers, particularly from developing countries face significant challenges in establishing credibility in the international marketplace;
5. Financing – Accessing financing for services enterprises is a challenge due again to the intangibility of services and therefore, the lack of traditional collateral that might underpin a business loan (e.g. the banks in the Caribbean insist on physical collateral or equivalent cash for debt financing). This is perhaps the greatest single impediment to unlocking the potential of services to promote development – notably amongst MSMEs;
6. Traditional focus of incentives – Apart from the tourism sector, Caribbean governments tend to focus their support on the traditional manufacturing or agricultural sectors. This is due to a variety of reasons, including a widespread lack of understanding of the services sector and uncertainty with respect to harnessing the potential of the services sector (perhaps due to the lack of data).

Table 6: TOTAL TOURIST (STAY OVER) ARRIVALS IN CARIFORUM COMPARED TO EUROPEAN TOURISTS

	2008	2009	2010	2011	2012	2013	2014	2015	2016	% change
Antigua & Barbuda	265.844	234.410	229.945	241.331	246.926	243.932	249.316	250.450	265.187	-0,25
Arrivals from EU	110.266	93.442	88.945	92.097	89.909	88.469	91.277	96.250	95.956	-12,98
Bahamas	1.463.006	1.327.007	1.370.181	1.346.372	1.421.761	1.365.586	1.427.066	1.484.063	1.481.832	1,29
Arrivals from EU	93.803	78.817	78.083	78.201	78.641	80.600	82.774	87.645	92.997	-0,86
Barbados	567.667	518.564	532.180	567.724	536.303	508.520	519.598	591.872	631.513	11,25
Arrivals from EU	251.778	220.704	212.276	225.009	210.638	209.798	231.559	255.027	258.408	2,63
Belize	245.007	232.249	241.919	250.263	277.135	294.176	321.217	341.162	385.583	57,38
Arrivals from EU	34.269	29.603	30.025	30.142	29.362	32.191	38.906	40.945	42.635	24,41
Dominica	81.112	74.924	76.517	75.546	78.965	78.277	81.511	74.481	78.087	-3,73
Arrivals from EU	13.787	11.590	10.725	11.538	12.816	13.552	14.666	13.758	14.596	5,87
Dominican Republic	3.979.672	3.992.303	4.124.543	4.306.431	4.562.606	4.689.770	5.141.377	5.599.859	5.959.347	49,74
Arrivals from EU	1.353.230	1.245.925	1.184.269	1.174.871	1.141.619	1.128.765	1.183.784	1.134.370	1.261.577	-6,77
Grenada	130.363	113.370	110.471	118.295	116.242	116.456	133.549	132.547	135.372	3,84
Arrivals from EU	44.372	35.650	35.173	36.022	32.618	27.102	31.208	35.917	34.400	-22,47
Guyana	129.595	141.281	151.926	156.910	176.642	200.060	205.824	206.819	235.312	81,57
Arrivals from EU	8.937	8.277	8.357	8.287	8.877	10.054	11.107	11.245	12.463	39,45
Haiti	258.070	387.220	254.732	348.755	349.237	419.736	465.174	515.768	467.114	81,00
Arrivals from EU	21.262	24.573	26.755	31.437	28.048	47.651	40.206	36.129	37.746	77,53
Jamaica	1.767.271	1.831.097	1.921.678	1.951.752	1.986.085	2.008.409	2.080.181	2.123.042	2.181.684	23,45
Arrivals from EU	284.700	276.799	271.315	253.045	222.428	235.811	261.081	279.332	294.709	3,52
St. Kitts & Nevis	128.755	96.077	98.329	94.843	97.857	100.997	104.730	110.337	106.797	-17,05
Arrivals from EU	12.331	8.303	9.201	8.853	9.081	9.767	10.835	12.098	11.797	-4,33
St. Lucia	295.761	278.491	305.937	312.404	306.801	318.626	338.158	344.908	347.872	17,62
Arrivals from EU	96.871	86.819	85.695	91.759	93.400	88.492	93.610	85.486	80.169	-17,24
St. Vincent & the Grenadines	84.101	75.446	72.478	73.866	74.364	71.725	70.713	75.381	78.751	-6,36
Arrivals from EU	22.302	19.097	17.665	20.549	20.410	20.401	20.784	21.580	21.390	-4,09
Suriname	150.711	150.628	204.519	220.475	240.041	249.102	251.611	227.699	256.951	70,49
Arrivals from EU	95.299	87.817	110.255	108.188	107.655	103.341	113.261	100.251	107.041	12,32
Trinidad & Tobago	432.551	430.631	388.310	430.922	454.683	434.044	412.537	439.749	408.782	-5,50
Arrivals from EU	63.189	61.924	52.329	62.740	58.308	68.068	79.839	68.216	57.294	-9,33
TOTAL TOURISTS	**9.979.486**	**9.883.698**	**10.083.665**	**10.495.889**	**10.925.648**	**11.099.416**	**11.802.562**	**12.518.137**	**13.020.184**	**30,47**
TOTAL EU Tourists	2.506.396	2.289.340	2.221.068	2.232.738	2.143.810	2.164.062	2.304.897	2.278.249	2.423.178	**-3,32**
EU as % of Total Tourists	25%	23%	22%	21%	20%	19%	20%	18%	18%	

Source: Caribbean Tourism Organization

2.5 Sectors with potential for increasing trade & investment under the EPA

In theory, there are many potential trading opportunities for the CARIFORUM group in the UK and EU under the EPA. However, practically speaking, the principal areas in which there are opportunities for boosting trade under the EPA are quite limited because of the "structural impediments" mentioned above. However, the growth sectors for specialty processed foods in the UK and EU market provide significant opportunities for producers in the region.[12] The increasing interest and demand in Europe for functional foods, herbal teas, spices, etc., can be tapped but technical regulations and private product standards inhibit CARIFORUM firms from tackling the mainstream consumer markets. Nevertheless, there are success stories in sauces and preserves and beverages. As one market study recommended:

> The exoticism attached to processed sauces, juices, jams and jellies from the region may be leveraged by entering specific segments within the EU market in a co-branded positioning. … Combination of ingredients offers another window of opportunity to access high-end segments. … Some of these products are bound to find the "legacy" segments wherein the diaspora shops for their favourite "food memories" from back home. Sustained positioning and promotion at Caribbean food festivals and cultural events can help these products go beyond these traditional buyers. [13]

A Dominican Republic company even sells its cider in the UK. There are also opportunities in the UK, EU and Asian markets for fine cocoa and chocolate from the region but there is need for greater investment in testing and certification and marketing.[14] There are small signs that a few producers are starting to move up the value chain from exporting cocoa beans to higher value products. For instance, Harrods in London now sells fine, single origin chocolate from Trinidad. This sort of initiative should be extended across CARIFORUM. Historically, the Caribbean has been exporting only cocoa beans to the EU with very basic incomes to producers while cocoa from the region is used to flavour and enhance luxury chocolate products in the UK and Europe. It should also be pointed out that the US Department of Agriculture included Chocolate Confectionery (HS 1806) in its list of "best high value product prospects for the UK market". UK imports of HS 1806 products in 2016 totalled $1,952 million.[15] There is clearly potential for CARIFORUM to increase its exports in this area.

The traditional focus of exporters from CARIFORUM has been primarily the "ethnic" foods market. Furthermore, most of the region's exports to the UK and EU markets tend to be agriculture based – fresh produce and agri-foods, along with some beverages and the traditional high-volume exports such as rum. (See detailed merchandise trade data in Annex II). The higher-value food segments in the UK and EU have very complex and sophisticated marketing and labelling and packaging practices that many CARIFORUM firms cannot meet. Nevertheless, since

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[12] See CEDIS, Towards a Strategy for the CARIFORUM Agri-processing Sector: Cooperate to Compete. Report prepared for Caribbean Export Development Agency, 2015.

[13] CEDIS, 2015, p. 27.

[14] See background paper on Fine Cocoa for the 3rd CF-EU Business Forum, Montego Bay, April 15-16, 2015.

[15] USDA Foreign Agricultural Service, United Kingdom: Retail Foods 2017. GAIN report, 12/21/2017, p. 13.

much of what CARIFORUM produces is agri-foods or agriculture-based, this will continue to be areas in which trade can be boosted for development.[16]

On the services front, there are clearly opportunities in the entertainment sector and Caribbean artists have particular appeal and are competitive in some genres. However, while well-known Caribbean entertainers access the European markets easily, administrative regimes such as visas and work permits seriously constrain the ability of other Caribbean entertainers from taking advantage of the market access granted in the EPA for supply of services through the presence of natural persons (Mode 4 under the General Agreement on Trade in Services or temporary entry). There may also be opportunities in information technology related fields and animation[17] but partnerships have to be developed between CARIFORUM firms and businesses in the UK in particular.

The most common means for CARIFORUM suppliers to export services to the UK and EU is through Mode 2 (consumption abroad) and this is principally through tourism. Although the number of EU visitors to CARIFORUM is not rising, they still account for thousands of potential clients at the national level to whom other services can be offered. The most obvious fit with tourism is health and wellness and this continues to grow in the region and globally.[18] Therefore, investment in spas and wellness facilities in CARIFORUM economies will actually help increase services exports but suppliers will have to differentiate their product offerings and focus on authentic and novel experiences, not just massages. Medical tourism has potential in CARIFORUM but EU tourists have free medicare at home. The biggest market for medical tourism is actually American tourists. There are some promising small signs of investment in a few Caribbean countries (St Kitts, St Lucia) to provide medical services to tourists, albeit far from the scale of Costa Rica or other Latin countries.

With regard to Mode 4 (the presence of natural persons), it should be pointed out that it appears that most EU Member States have not yet put in place the administrative arrangements to facilitate the market access granted under Article 83 of the EPA for Contractual Service Suppliers (CSS) and Independent Professionals (IPs) from CARIFORUM states. In 2018, there were no responses to enquiries by the Consultants about this issue to the Services Enquiry Points in several EU states. Furthermore, Germany only recently ratified the EPA (in 2018) and German immigration authorities had indicated in 2013 that none of the immigration-related elements of the EPA could be "provisionally applied" until the EPA was ratified. Numerous services professionals in CARIFORUM states have pointed out that real market entry to supply services

[16] See Casse Consultants Ltd. Specialty Foods Diagnostic Study. Report prepared for Caribbean Export Development Agency, 2011. See also Nex Consulting, (2015) which assessed the potential in CF for exports of specialty foods to the EU and US.

[17] Heather Kenyon, Animation Consultant Report. Prepared for the British Film Commission, 2015.

[18] Wellness travellers spend more per trip than the average tourist, and this holds true for both domestic and international travellers. In 2017, international wellness tourists on average spent $1,528 per trip, 53% more than the typical international tourist. https://globalwellnessinstitute.org/wp-content/uploads/2018/11/GWI_GlobalWellnessTourismEconomyReport.pdf

in the EU is a major problem because of unclear immigration and work permit issues and complex regulatory regimes in several Member States.[19]

3.0 FINDINGS FROM INTERVIEWS WITH CARIBBEAN STAKEHOLDERS

3.1 Agro-Processed Foods/Natural Ingredients

3.1.1 General Challenges

Low Market Interest

A key challenge in improving the export enabling environment between CARIFORUM and the EU is that the EU is not considered a priority market by the large majority of CARIFORUM firms. Accordingly, there is little advocacy on the part of CARIFORUM firms for actions that would improve trade with the EU. The limited resources available by CARIFORUM SMEs to support export efforts are typically directed to regional markets, as well as the USA. Increasingly, CARIFORUM exporters are looking towards large Latin America markets as potential target markets.

> *"We have to balance the cost of developing markets in the EU against the costs of expanding our nearby English-speaking markets including the Caribbean, USA and Canada." (* John Mahfood, CEO, Perishables Jamaica)

The reasons that the EU is not considered a priority market for goods producers are numerous, including: the cost of shipping; the cost of travel; high quality standards and export requirements and the resources involved in meeting these; limited established networks in the EU; language and cultural barriers; a mutual lack of knowledge of the markets, etc. Most recently, the uncertainty around Brexit and exporting to the UK have further deterred CARIFORUM exporters from exploring the EU market.

As such, the EU market remains relatively uncontested in large part by CARIFORUM firms (with exceptions in a handful of subsectors, including rum). Accordingly, several challenges articulated around contesting the EU market during the interviews by CARIFORUM companies are in fact general export challenges or anticipated ones, rather than actual challenges encountered first-hand.

Limited Understanding of the EPA Agreement

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[19] This was also flagged in a recent study that surveyed 50 service companies across CF that was commissioned by the Caribbean Policy Development Centre (CPDC) in preparation for the EPA Consultative Committee meeting on December 3-4, 2018 in Saint Lucia.

Despite the efforts made by many agencies in the region over the past 10 years with respect to raising awareness around the EPA, including significant efforts made by Caribbean Export, the firms interviewed noted that they have little knowledge of the agreement. However, these companies expressed an openness towards receiving information on the agreement and learning more.

It may be useful for Caribbean Export to devise a regional strategy for raising awareness through the ongoing sharing of key information, utilizing Caribbean Export's trade and business support organization network. New materials will not necessarily need to be developed as many great resources, including summaries, training materials, and the EPA video series, currently exist. These tools, however, are not being well utilized. For example, Caribbean Export has developed an easy to understand EPA video series, including videos in priority subsectors such as food, craft, rum, spa and wellness, services, music, ICT services, etc. These videos have had limited circulation in the region based on the number of views, (as at September 15, 2019), which range from 34 views for the video 'Exporting Caribbean Craft to the EU' to 340 views for the video 'Exporting Food to Europe Under the EPA'.

Additionally, it would be useful for Caribbean Export to develop EPA information tools designed for EU buyers, distributors and umbrella organizations in priority sectors. (While knowledge of the EPA on the CARIFORUM side remains generally limited, there is *no* knowledge of the EPA on the part of the private sector in the EU). The information tools most in demand by the CARIFORUM firms interviewed are not EPA summaries, but rather step-by-step guides for harnessing the agreement. Companies are most interested in what they need to do now/next to get one step closer to exporting to the EU – regardless of whether this information is offered as a guide, through training, or via technical assistance.

Challenging Standards

EU standards are amongst the most rigorous in the world. The lack of expertise in the region with respect to EU standards and the high costs associated with complying with the standards and certification have resulted in a very small number of companies achieving EU certification. This impedes exports to the EU.

High Cost of Shipping

The cost of shipping to the EU is a challenge for reasons other than simply the expense alone. Exporters are unable to supply or sell the volume required to ship container loads of goods (which would result in lower shipping costs per unit than air or less-than-container-load shipments), CARIFORUM collaboration amongst exporters to the EU (i.e. sharing shipping costs) is limited and has proven unsuccessful in the past; and solutions such as fulfilment centres are not yet being adequately explored by SMEs.

One company interviewed receives small, ad hoc orders from customers in the UK and resorts to shipping these by post. The company noted that packages can take up to two months to arrive – a timeline certainly unacceptable to those living in fast-paced markets and used to the convenience of Amazon Prime's one-day shipping. Another company noted that they had made significant efforts to consolidate shipments with other manufacturers but given that purchase orders were received (and therefore scheduled to ship) at different times, it was difficult to make consolidation work.

Limited Financing

Obtaining loans or investment can be challenging for businesses in the region. Lack of financing impedes market development efforts such as the adoption of EU certification, undertaking market visits, EU marketing efforts, etc.

Supply Capacity

Exporters indicated that they face challenges in meeting supply demands, because of the region's limited production capacity and the general aversion to collaboration among companies in order to reach economies of scale.

3.1.2 Needs Articulated

A few needs were articulated frequently during the interviews with Caribbean firms. These include:

a) The need for accurate and timely market research/intelligence;
b) Access to or information on buyers and distributors of Caribbean and priority sector products across the EU;
c) Marketing support for Caribbean products.

These will be treated in turn.

Market Research & Intelligence

Commentators frequently expressed the need for market research and intelligence with respect to the EU market. This includes: pricing information, regulations governing particular products, sector trends, labelling and packaging trends, shipping options, existing and emerging competition, potential customers/buyers/distributors and more generally, export opportunities.

As the vast majority of businesses in the CARIFORUM region, including those interviewed, are micro and small, they have limited resources or capacity to undertake market research, let alone acquire the market intelligence necessary to empower them to make strategic business decisions. While market research is available online or is otherwise accessible in the public domain, market intelligence is significantly more difficult to acquire. It requires an 'ear to the ground', typically via a research officer stationed in the target market, a strategic in-market partner or through regular market intelligence missions to the market. These options tend to be out of the reach of the large majority of businesses in CARIFORUM.

While many CARIFORUM member states do indeed have national representatives in key markets abroad, including the UK, the role of these persons is generally investment seeking and tourism promotion. Little focus has been made on providing national exporters with the stream of current intelligence required to strategically penetrate an export market. Relatedly, the capacity of foreign service officers (in overseas diplomatic missions) to acquire and provide the level of intelligence required has also not been developed.

The ramifications of not being able to access market intelligence is lost opportunity for exporters and would-be exporters, as well as sub-optimal market penetration strategies, which may result in increased time and/or expenses as it relates to market penetration and possibly failure to successfully contest the market.

One solution would be to establish Export Desks in the EU to provide market intelligence to companies/exporters in the CARIFORUM region via a regionally accessible online platform.

Distributors

The importance of finding the right distributor was underscored by those firms successfully exporting to the EU. Those firms not yet regularly exporting expressed the need for assistance regarding finding distributors:

- Support in finding the right distributors, including not only distributors that cater to Caribbean and ethnic products, but also those that do *not* (and instead place focus on specific products);
- Support in vetting distributors, including credit checks;
- Facilitating introductions to distributors;
- Hosting exporter/distributor forums.

"We would like to come out of our 'comfort zone' in dealing exclusively with distributors that cater to Caribbean products." (Kareema Muncey, Managing Director, Home Choice)

Marketing Support

The interviewees noted that there is a general lack of knowledge around Caribbean-origin products and that Caribbean products tend to be sold exclusively as 'ethnic products', rather than mainstream ones. This includes 'generic products' such as herbal teas and ginger extract. Marketing assistance is needed to support market growth beyond Caribbean stores or ethnic aisles in the grocery stores. A Caribbean-brand awareness campaign is needed for food products, much in the same way it was undertaken for the rum sector.

Other export assistance needs expressed include:

- Access to finance for growing businesses;
- Technical support as it relates to quality standards (e.g. traceability certification in the cocoa sector);
- Technical support to improve productivity;
- Support regarding the establishment of export/sector clusters and/or strategic alliances;
- Support with respect to branding, marketing, packaging and other pre-commercialization efforts;

- Lobbying support for the implementation of online payment solutions nationally.

3.1.3 Advice From a Goods Exporter to Would-Be-Exporters:

Prioritize exporting. Efforts, even at onset, should be focused on exporting. By targeting export markets and focusing on challenges such as establishing credibility, building networks, branding/labelling/ packaging, improving production, etc., your competitiveness in the national market will improve as you build successful export markets. Additionally, it is important to have dedicated staff exclusively working on 'exporting'. If staff focuses on 'day-to-day' alongside exporting, day-to-day invariably takes precedence and exporting gets little attention.

> ***"Most companies look to domestic markets and exporting is considered 'a bonus'. Top Teas looked at exporting as their 'bread & butter' and focused all resources there."*** (*(* John Mahfood, CEO, Perishables Jamaica)

Participate in key trade shows. Highly successful CARIFORUM exporters to the EU (Baron Foods, Home Choice, Antigua Distillery, Ron Veleiro) attribute their success in connecting with European buyers and distributors to their consistent participation in key trade shows.

Participate in food awards programmes/events. Companies that have successfully competed in food awards programmes have noted that success in these events has resulted in interest from buyers and distributors. For example, Baron Foods credits its numerous awards by the International Taste Institute in Brussels, as a factor in the company's success, but notes that other Caribbean companies are not participating in this evaluation. Antigua Distillery and J Wray and Nephew note that after winning multiple awards, distributors approached the companies and successful long-standing relationships were established.

Take advantage of technical assistance. Another success factor articulated by exporting companies is to take advantage of the technical support programmes being offered by Caribbean Export and national export promotion organizations. The ongoing efforts of these organizations in cooperation with your company will lead to export success.

Find your niche. The region, for the most part, cannot compete with generic products manufactured in large quantities. If you are not a company which boasts large manufacturing facilities, do not try to tackle the low-end market. Instead, develop high-end, niche products. Many companies in the region do not believe that they have 'gourmet' products – but they do. Develop and position these products as 'high-end'. Do not spread yourself too thin by focusing on too many products at once.

Learn and Understand. Become familiar with the EPA agreement and undertake research on EU regulations and market entry requirements. Work steadily on meeting these requirements.

Build and maintain networks. Networks are keys to information and opportunities. Membership in a Chamber of Commerce globally and in the EU can serve as a useful platform for building networks.

3.2 Interview Findings: Cultural & Creative Industries

In general, the feedback from the interviewees in the Caribbean cultural and creative sector reflect the comments made by those in the agro-processing and natural ingredients sector, particularly as it relates to challenges. Challenges expressed include: limited understanding of the EPA; limited access to information, including market research and market intelligence; limited networks in the EU; and low levels of market prioritization.

While there is low awareness of the EPA and the Protocol on Cultural Cooperation in it, there have been various support measures to Caribbean creatives, particularly in music as a result of the latter. For instance, the Copyright Society of Barbados, COSCAP, indicated that through the EPA and Protocol, it received support for the internationalisation of some of its members in a partnership with WOMEX (World Music Expo) in the German market. There were a number of workshops on the business of music, the European music market and understanding the profile of the German market for calypso. They also co-produced a concert with German artists and were invited to participate in a music festival in Berlin. There were also further training activities through WOMEX in Barbados in 2016 and 2019. [20] Various other initiatives have been funded by different donors and EC programs in the creative sector as a result of the special focus in the EPA on cultural activities and market access in the entertainment sector.

3.2.1 General Challenges

Market Research and Intelligence

For service providers, having access to current market research and intelligence is particularly important as services markets tend to be especially fluid and dynamic. In addition to the challenges noted above faced by SMEs in the collection of market research, namely limited available resources, service providers, more so than manufacturers, have not developed the necessary market research skills. This holds particularly true for services firms in the cultural and creative industries, whose focus tends to be exclusively on 'creating' with no plan in place for the 'distribution' of the creations. The lack of capacity may be related to the challenges around the intangibility of services and the lack of services-specific training available which addresses market research strategies.

It would therefore be useful to provide training to CARIFORUM companies which would include market research tools and how to use them, relevant (sector specific) web pages to utilize in conducting market research, as well as how businesses might strategically incorporate research into their day-to-day activities. For example, a good passive research tool to utilize is a website monitoring tool. This tool notifies users when a specific web page has been changed. This is useful when monitoring events, opportunities or grant pages. Google Alerts is another useful, passive research tool. It notifies subscribers via email when a specific word or phrase is added to web pages, newspaper articles, blogs, or scientific research.

[20] As reported by Erica Smith, CEO of COSCAP. See Burri and Nurse (2019).

Like the companies in the agro-processing and natural ingredients sectors, firms interviewed in the cultural and creative industries also expressed a need for a 'step-by-step' guide to exporting to the EU. There has been a repeated expressed need for a clear, well documented 'step-by-step' guide published by an authority that could be used not only by CARIFORUM companies, but to support alliances between CARIFORUM and EU firms. Successful firms in the market noted that the 'learning process' was a significant challenge to them. It would be useful to harness the experiences of successful firms in the EU in the development of a detailed guide.

Additionally, calls were made by services firms in the cultural and creative industries for on-the-ground representation; more representation by Caribbean people in creative businesses (e.g. publishing houses, event organizers, etc.) and additional market visit opportunities.

Networks and Alliances

CARIFORUM manufacturers have expressed needs around building relationships with reliable and interested buyers and distributors. The services firms interviewed expressed a similar need around building strategic contacts in the market. More so for services firms than manufacturing, building relationships is critical to establishing credibility and services exporting. Building networks must be a key focus of export efforts. Developing relationships is additionally key to regional and CARIFORUM-EU collaborations.

As noted above, it would be useful for Caribbean Export to build and maintain a database of relevant CARIFORUM contacts, and, importantly, maintain relationships and build knowledge with these contacts through ongoing provision of sector specific marketing information, including information on the EPA. It has been noted often that there is no knowledge of the EPA on the EU side. There is a strong need to develop services around the demand side of the agreement.

Firms interviewed in the cultural and creative industries, also noted the lack of cross-sector alliances in the region between those in music, video/animation, fashion, craft, food, etc. Opportunities like the 4th EU Business Forum serve as a good platform for the development of these relationships.

Access to Finance

Frustration was expressed around the high costs of doing business in the EU. It was noted that the expenses around flights, hotels, incidentals, meals, etc. made it necessary, on occasion, to decline opportunities in the EU in order to maintain a reasonable profit margin. This is compounded by the challenges around access to funding SMEs face, a particularly frustrating challenge to service providers because of the intangible nature of services firms and accordingly the lack of available collateral for lenders.

Additionally, challenges were expressed around funding sources available in Canada and the EU. In Canada, it was noted, that funding sources restrict or limit outsourcing (i.e. animation, film production, video game development), despite the fact that Canada is facing a growing shortage in IT-related services, including those related to the cultural and creative industries. Restrictions on outsourcing impede the utilization of grants.

It is recommended that Caribbean Export expands its work in the area of access to finance, in particular, access to equity financing under its Regional Angel Investment Network.

3.2.2 Audio Visual

Audio visual was not among the subsectors liberalized in the CARIFORUM-EC EPA. But there is provision for co-productions in the Protocol on Cultural Cooperation of the EPA. There is the perception that the EU is 'closed' for film and animation production because of EU broadcast quotas. It was noted that while there is some demand with respect to smaller isolated projects or for the provision of outsourcing services for project 'overflow', the EU market has not been a priority focus because it has been easier to work with companies in the US or those where a co-production treaty is in place.

One perceived deficiency of the EPA is that there are no provisions in place to enable foreign partners to access funding from national agencies. For example, a French production company can access up to 80% financing from banks, on the condition that the project is 100% EU produced. If the same French company were to enter a co-production arrangement with a CARIFORUM firm the bank would finance only the EU investment in the project. Therefore, in a 50-50 partnership, in this scenario, the bank would finance 80% of the French production company's 50%. This means partnering with a CARIFORUM firm is in fact a disincentive. One means of circumventing this challenge is through the establishment of matching facilities in the region, which would provide funding for the CARIFORUM half of the project. In this regard, it was thought that the Cultural and Creative Industries Innovation Fund (CCIF) at the Caribbean Development Bank should be larger and more ambitious.

3.2.3 Advice From a Creative Services Exporter to Would-Be-Exporters:

It's a Business. Many Caribbean animators or film producers are starting from the premise of wanting to tell Caribbean stories. Additionally, small and new animation studios in the region have great ideas and great designs. However, there is little understanding as to how expensive it is to produce Caribbean stories. The best way to create an eventual space for Caribbean stories is by learning how others in international markets do it by providing outsourcing services and focusing on building efficiencies, networks and creating a profit.

Build Regional Networks. Tap into the international pipeline as a regional team. At present opportunities are being lost because there are not enough resources available on a company by company basis.

"Networks are your biggest strength." (Jerome Hamilton, Headline Entertainment)

- Explore non-traditional ways to get music 'out there'.
- Seek out guidance and mentorship.
- Do your market research.

4.0 FINDINGS FROM INTERVIEWS WITH EUROPEAN STAKEHOLDERS

4.1 European Buyers of Caribbean Goods

Of the twenty one (21) companies contacted in the UK, Belgium, France, Netherlands, Germany, Czech Republic and Bulgaria, only 5 companies agreed to interviews. (A list of companies is in the Annex to this report). The main findings from discussions with companies are outlined below.

First, the EPA is not something that most European buyers of Caribbean products have heard of and it apparently does not directly affect their business. Second, most of them were not aware of the CARIFORUM-EU Business Forum to be held in Frankfurt in September 2019, and none except 2 indicated that they will attend it.

Several companies get products that already are in the EU and would have been imported by another company. The biggest importers of Caribbean products seem to be in the UK and they distribute further to other European countries. Some wholesalers/retailers of Caribbean foods in Belgium and the Netherlands buy products from wholesalers in the UK and Holland because volumes are too small to become a full importer. They buy 1-2 pallets at a time and their clients are a mix of restaurants, supermarkets, small shops and night shops. (A Belgian company that has been importing Caribbean products for 43 years indicated that they are unable to buy large quantities because the market is small and varied so they cannot even buy from Grace Foods UK who require large purchases). It is important in the food business for products to be well within expiry limits and to have some variety of products. Some buyers indicated that there seems to be too much focus on pepper sauce or seasonings by Caribbean producers.

Sunland Foods is a very experienced distributor of Caribbean food products in the UK. They expressed interest in Caribbean Cure teas, but it was too high end as a product for their clientele. They would be interested in teas if they are sold in sachets and not loose leaf in tins. But since tea is not an expensive product, they are very wary about the cost of shipping from Trinidad.

With regard to the natural ingredients/organic market, an interesting company in the UK is Impact Foods (www.impactfoods.co.uk). They sell a wide range of super foods and products that originate in developing countries. Of interest to CARIFORUM producers are herbs and spices such as ginger, turmeric, cinnamon and dried fruits such as coconut, mango and pineapple. Impact Foods also imports and distributes "super food" products such as guarana powder, moringa powder and coconut flour. However, they indicated that they do not currently import products or inputs from the CARIFORUM countries.

Rum is an old industry and imports of rum are growing at a healthy rate in Europe so attention was not focused on this product in interviews.

Retailers and wholesalers in the EU are always interested in new Caribbean products but would like to be informed about them by email or flyers, etc. They are not interested in products that are intermediate but prefer final products for consumers. So, natural ingredients that are intended for further production into cosmetics or pharmaceuticals is not relevant to their business model. Also, it is not clear if the Caribbean can produce enough natural ingredients (essential oils, etc.) in large enough quantities and with consistent supply as inputs for the production of cosmetics or pharmaceuticals in the EU.

4.2 European Buyers of Caribbean Creative Services

The "buyers" of Caribbean creative services in Europe are mainly music festival organizers and Carnival promoters or bands. While the mainstream music festivals in European cities are run by Europeans, most of the promoters of Caribbean music and carnivals that operate in the EU are persons of Caribbean origin who reside there. The good news is that interest in Caribbean music of several genres is growing and increasingly, there are Caribbean elements in annual carnivals in Rotterdam, Cologne, London, Berlin. There is also a small carnival in Geneva in which Caribbean DJs and carnival promoters expect to participate in 2020. However, while reggae is long established in many music festivals around Europe, soca music is growing only very slowly. However, the carnivals have potential to promote soca and other Caribbean genres and potentially bring them into the mainstream, eventually.

In the **case of film/video or animation**, in spite of the Protocol on Cultural Cooperation in the EPA, most of the European companies or professionals who operate in this sector and are interested in collaborating with Caribbean creative persons and companies are unaware of the EPA or its cultural provisions. A few that are more clued into the cooperation elements of the EPA expressed interest in seeing the Protocol being implemented.

There are a few exceptional cases of major success in the film sector. For instance, the wealthy Vicini group from the Dominican Republic which recently rebranded as Inicia has set up an office in London and apparently has partnered with Paddington Studios on a creative project. But in most instances, European film or animation producers work only with counterparts in countries with which there is a co-production agreement or treaty. The reasons for this are due to how subsidies are granted in the EU for film or video or media in general.

Neon Rouge Production, (www.neonrouge.com) a Belgian film company, is interested in collaborating with Caribbean filmmakers. They deal in world cinema that is culturally grounded but with global appeal. They originally focused on African stories but are now looking at stories dealing with diaspora. Neon Rouge attended the Trinidad and Tobago Film Festival in 2012. Neon Rouge is currently working on developing a film project based on *The Schoolmaster,* an adaptation of the book by Earl Lovelace. The screenplay was written by Asha Lovelace.

It was pointed out that films take long to develop and that bilateral agreements make film collaborations possible. The EPA Protocol on Cultural Cooperation provides for a co-produced work to be granted preferential status as a European work if it is produced under a co-production agreement between a European and CARIFORUM country. Since most EU Member States give tax benefits to companies to spend money locally, it is critical to have co-production agreements; if not, there is no incentive to collaborate on films with foreigners. It was highly recommended that Caribbean countries seek co-production treaties with EU Members in order to significantly increase the potential for collaborations between Caribbean and European filmmakers. In order to get a co-production agreement, it is necessary to have a critical mass of people in both countries that are interested in collaborating and that can lobby their film commissions. And the film producers´ association in the EU country will have to say that they do not object to a co-production treaty.

In the case of Neon Rouge's Trinidadian film project, a co-production agreement between Belgium and Trinidad and Tobago will make it possible for the company to source funding in any EU Member State. It was recommended that the TT Film Commission should approach the film commission of Fédération Wallonie-Bruxelles to negotiate a co-production treaty.

Similar suggestions were made by Spanish film production companies who indicated that this was necessary to stimulate co-productions between Spanish producers and Caribbean creative professionals in film (movies, animation, documentaries).

The **carnivals in the EU** that have Caribbean elements are a special sub-set of the creative industries market. There are carnivals in the UK, Belgium, Germany, Netherlands, Sweden and even Switzerland. (There will be a carnival in Geneva in 2020). In this sector, there are some disc jockeys (DJs), music promoters and carnival band organizers who operate in various European cities. They promote awareness among Europeans of Caribbean musical genres and other cultural elements . Four operators in this sector shared their insights on issues and opportunities in EU markets. Like most people interviewed, the music and carnival promoters were not aware of the Economic Partnership Agreement (EPA) between the Caribbean and EU nor that there is provision in it for market access for Caribbean entertainers; or the facilities in the Protocol on Cultural Cooperation.

A good case study of the issues and challenged faced by this market segment is the Rotterdam Carnival. There were about 25 bands in the Rotterdam Carnival (26-27 July in 2019) but only about 3 representing Caribbean elements (including Curacao, Aruba and Trinidad). The Rotterdam municipality provides the trucks and generators free of charge but bands must provide their DJs and related stuff. It is expensive to organize all the activities for Carnival and related music events so sponsorship is critical. But music side shows are used to fund carnival activities.

The main problem Caribbean carnival operators face is the lack of sponsorship; but this is compounded by the fact that the Rotterdam authorities tend to have a monopoly sponsor for the entire carnival and when Caribbean bands get sponsorship from someone else, they are not allowed to use the sponsor's brands or logos on their band materials because of an exclusivity arrangement between the Rotterdam authorities and their sponsors. This is a big issue for Caribbean bands in the Carnival. The main Carnival sponsor in 2018 was Jack Daniels but Caribbean bands had a drinks manufacturer (Lavish) as sponsor but were not allowed to use it. (Lavish -www.drinklavish.nl/)

The Caribbean promoters interviewed do not face any problems regarding obtaining work permits or visas for artists or entertainers that they bring from the Caribbean to perform in shows/fetes around Carnival time. Various commentators pointed out that UK immigration authorities are tough on artists and entertainers and insist on work permits or work visas. So, if an artist has to stop-over in London first there are sometimes complications at the border. Interestingly, although Belgium was one of the only two countries that did not grant market access for entertainers under the EPA, music promoters indicated that Belgian immigration does not insist on work permits if an artist visits Belgium to perform in one music festival or concert. This is in spite of the legal requirement for a work permit to supply any service in Belgium.

However, Caribbean bands do not collaborate on information or anything else because they really compete with each other in terms of attracting clientele to their fetes and bands. Revenue is earned through arranging music events around carnival time and Caribbean artists are usually brought to the shows. (For the carnival, band leaders offer costumes, food, etc. for "masqueraders" in their band).

Import of Caribbean entertainers

It is usually mid-range artists (soca) that are used in music events around carnival time because the well-known, big name artists are too expensive for the size of events. Since Caribbean music is still developing in popularity in the Netherlands, the client base is still small. Rotterdam Carnival is modelled along the lines of Brazilian & Colombian carnival so Trinidadian cultural elements are still nascent but growing. Salsa is a big element in Rotterdam.

One issue for Caribbean artists/entertainers in the EU is the lack of a mechanism to collect royalties for their songs/music. There is need to register their music in European countries and to code it. Or their music should be put on Shazam, one of the most popular music recognition apps. [21] Copyright organizations or collection societies in the Caribbean need to interface with their European counterparts in this regard.

Another big issue for Caribbean show promoters and bands in Rotterdam (and other cities) is the cost of bringing artists from overseas to their events. Travel is very expensive so it would be best if they could have an information network of show promoters across Europe in countries where there are Caribbean carnivals or music events so that the cost of travel could be spread across several events and reduce the per unit cost to any particular music show or event. This sentiment was expressed by other music promoters and DJs as well as the head of Antilliaanse Feesten, the largest commercial Caribbean music festival in the EU, apart from the UK. [22]

A suggestion is to create a formal network of Caribbean show promoters in each country (Instagram, Twitter, FB or WhatsApp) in which there are music festivals or Carnivals with Caribbean elements. At the moment there are informal networks of friends only; so there are information gaps in terms of which Caribbean artist will be available where and when.

[21] If you capture 20 seconds of a song, no matter if it's intro, verse, or chorus, Shazam will create a fingerprint for the recorded sample, consult the database, and use its music recognition algorithm to tell you exactly which song you are listening to.

[22] In 2019, there were 38,000 patrons at Antilliaanse Feesten, a 3-day music festival in Hoogstraten, Belgium close to the Dutch border that has been held since 1983. (https://antilliaansefeesten.be).

Music and carnival promoters indicated that they receive very little support from Caribbean diplomatic missions in Europe. It is now even difficult to get contacts for people or companies. Missions do not have funding or other involvement in music or carnival events in European cities so promoters of Caribbean cultural activities have to fend for themselves. But it is important for Caribbean governments to recognize the benefits of music and carnival promoters in the EU and the economic potential for creatives in the region of promoting Caribbean creative/cultural activities in Europe. These events also promote Caribbean products and tourism.

4.3 European Investors in the Caribbean

The general finding is that the EPA has little bearing on actual investment by companies in the EU or vice versa. In fact, most EU companies are not aware that there is an EPA between the Caribbean and the EU. Firms invest in a market based on a range of considerations that include, market potential, start-up costs, taxation levels, availability of capital, returns on investment, among other considerations. While most CARIFORUM countries granted access for Mode 3 (investment) in a wide range of areas and the EU Member States granted even broader and deeper access, this does not seem to have affected the investment decisions of companies.

It was particularly challenging to find European investors that were willing to grant interviews about their experience in the Caribbean. Of the numerous investors that were approached, only two agreed to participate in the research; both are active in the Dominican Republic. Of these, none were aware of the EPA and hence had no views on investment facilities in it. Their investment in the Caribbean was as a result of market conditions and potential for growth, the regulatory environment and decent returns to their shareholders.

Since the renewable energy sector is a major focus in the Dominican Republic and wider Caribbean, it was not surprising that several EU firms are investing in this sector (4 out of 8 companies identified by the national investment agency, CEI-RD). Hotel development is traditionally the sector that attracts the largest investment in the Dominican Republic but renewable energy is fast becoming a very attractive sector for EU investors in the Dominican Republic. Of the companies that shared their experience, one was in renewable energy (Akuo Energy) and the other in property development (Noval Properties).

Akuo Energy from France (http://www.akuoenergy.com/fr/) invested in the renewable energy sector in the Dominican Republic. It is a fully owned French investment of US$130 million and it was all financed externally. The project is a 50 MW wind farm that can generate 180 Gigawatts per year. They produce and sell all their electricity to the national utility.

Why the Dominican Republic? Because they were already in Martinique and Guadeloupe and realized that the Dominican Republic had the best regulatory environment for investment in renewable energy. The Dominican Republic is also of a sufficient size in terms of the market and is very open towards inward foreign direct investment (FDI). They were already in Uruguay so they have experience in Spanish-speaking jurisdictions.

They got a local contact in the Dominican Republic from the French Embassy who guided them on the ground. The process to invest there took some time. They got approval at the end of 2012 but financing was settled in 2017. Akuo Energy took their time to research the market and arrange financing. They got European finance (Probacos, SMO, IEC) to invest in the Dominican Republic. When Akuo Energy started, local (Dominican) banks were not ready to invest in the renewable energy sector. They thought it too risky. But now, since they have seen multilateral banks financing wind power, the local banks might become interested.

Regulatory environment

It was felt that the path and vision are very clear in the Dominican Republic regarding foreign investment. The authorities welcome FDI but the approvals process can be slow and bureaucratic. However, it was quick to establish their company – 2 months. No special conditions were imposed by the Dominican Republic government. They got equipment imported duty free. The regulations were clear.

Will they increase their investment in Dominican Republic or further Caribbean? Yes, Akuo Energy is working on developing a solar project for the Dominican Republic. There are further opportunities in the Dominican Republic but the market is not fully open. In 2016 the government realized that although they had granted approvals, the actual investment in renewable energy was not happening, so they changed policies. The Government of the Dominican Republic is now more careful in granting concessions. But other projects have been built recently.

The company believes that overall, the political and regulatory situation in the Dominican Republic is good and country is very open and receptive to investment. But Akuo did not work with CEI-RD – the investment agency. Akuo did not use any facility in the EPA and EPA did not affect its decision to invest in the Dominican Republic.

Their advice to other investors – it is critical to find the right contacts on the ground and in government. In the Dominican Republic it is important to build relationships and trust. Advice to government authorities in the wider Caribbean - It is necessary to have a long term vision about policy and regulations in any sector. Investors look long term and do not like political ups and downs.

Noval Properties from Spain (www.novalproperties.com) invested in Punta Cana, Dominican Republic in property development. It is an engineering, construction and project management company. Its reasons for choosing the Dominican Republic as an investment location were as follows: good business opportunity; excellent growth generally and in the tourism sector; 8th best economy in Latin America; excellent geographical location with worldwide access.

In terms of incentives or concessions to encourage investment, the CONFOTUR law[23] which allows investors a 15-year tax break when they buy one of Noval's constructions is important. According to Article 2, all benefits granted by this legislation may be given to all natural or legal persons domiciled in the country that undertake, promote or invest capital in tourism related infrastructure, such as real estate. And Article 4 provides that those who benefit from these incentives are exempt from the payment of the annual property tax (1% of property value above US$150,000) for 10-15 years, and transfer tax (3% of the purchase price).

[23] Tourism Incentive Law #158-01

Noval recommends investing in the Dominican Republic since it has been a very positive and profitable investment so far. And they expect to increase their operations there. The business environment is good and regulations and incentives are clear. Furthermore, the government is very receptive and welcoming to foreign investors.

4.4 Caribbean Investors in the EU

There was not much success in identifying Caribbean firms that invested in the EU, except for the UK. Years ago, Associated Brands Ltd. from Trinidad invested in Malta. But since the EPA, it is not evident that anglophone Caribbean firms have invested in Europe. As is well known, Grace Foods UK, produce a wide range of Jamaica products in the UK and their brands are well known and their market is growing. Grace Foods also exports to various countries, including EU members. This might be a model for other Caribbean producers to consider but it involves high start-up costs in terms of capital. However, it was not possible to interview Grace Foods UK about its experience as an investor there.

Insights were obtaining from three investors from the Dominican Republic on investing in the United Kingdom.

Tropifruit is a Dominican Republic -UK family business that is integrated from crop to final retail. It is based in Essex and owns local transport, ripening and warehouse facilities in England. Only the air cargo services from the Dominican Republic to London is provided by outside entities. With 4 weekly British Airways flights and 2 daily charter flights between the Dominican Republic and London there is adequate air freight service. Tropifruit is a leading distributor specialising in ethnic produce from various countries (fruits and vegetables).[24] They serve a diverse ethnic market through their customers including stores, market traders, independent retailers, caterers, restaurants and other food service businesses. Their global supply chain includes a number of high quality growers and their own produce farms in the Dominican Republic and North Africa. They are long established in the UK and find it an easy market to invest in and forsee future growth of the company.

CHG InterTrading was set up in the UK in 2008 and started operating in 2009. It is a small family business and the company is a facilitator and broker to help Dominican Republic businesses take advantage of export opportunities in the UK market. It promotes exports to and imports from the Dominican Republic. But it is willing and available to provide similar services to help businesses from the rest of CARIFORUM and Latin American countries. The CEO suggested that one of its challenges is the long time it takes to build relationships with businesses in the Dominican Republic because a lot depends on trust since most companies are family businesses. It has assisted about 25 companies in the past 10 years to take advantage of the UK market.

CHG InterTrading expressed appreciation for the ease and speed with which an investor can establish in the UK. But it suggested that there is need to still educate businesses in the Caribbean about the EPA and how to utilize the benefits in it for Caribbean trade and investment. There is

[24] Tropifruit deals in and sells a wide range of fruits and vegetables – avocados, bananas, mangoes, coconuts, pineapple, lychee, passion fruit, dasheen, ginger, sweet potato, hot pepper, dasheen, among others.

potential to increase exports of various other products because many Europeans visit the Dominican Republic (and wider Caribbean) as tourists and experience or consume local products, such as Dominican coffee; and this led to market development for Santo Domingo coffee in the UK. It is possible to increase the linkages between tourism and other economic sectors and develop demand overseas for Dominican products.

Zebu Partners is a financial investment company that facilitates financial investments from the EU into the Dominican Republic and other countries. Its CEO is a Dominican based in London. Its sectors of focus are mainly SME and consumer credit, although they also consider hotels and real estate projects on an ad hoc basis. Most of the investors are EU based but their investment vehicles are outside of the EU for fiscal reasons. This is especially the case in the UK where they access financial investments via UK territories like the British Virgin Islands or other fiscally efficient jurisdictions.

In light of the interest of Dominican Republic firms in the UK it was not surprising that the Dominican Republic Chamber of Commerce in the UK was recently established to help catalyse business and maximize opportunities for Dominican Republic firms in the UK market.

Two of the three Dominican Republic companies thought that the EPA is directly relevant to their business. It is not surprising that the importers of goods into the UK from the Dominican Republic are appreciative of the duty-free and quota-free facilities under the EPA. And all exporters of goods in the Dominican Republic and wider Caribbean see the EU market as large and growing, notwithstanding the various challenges they face to export from the region. (These are discussed in the first section of this report).

5.0 CONCLUSIONS AND RECOMMENDATIONS

5.1 For Caribbean Goods Producers

Market Development on the EU Side

Caribbean Export has made significant efforts in supporting exports from the CARIFORUM region (i.e. on the supply side). Conversely, it has been noted that limited efforts have been made on building the demand side in Europe. To increase CARIFORUM exports to the EU, both the supply and demand side must be supported through merging strategies. Recommended actions that would support growth in the demand side and improve integrated demand-supply strategies include:

i) Ongoing market research in priority sectors on imports, trends, needs, regulatory requirements, etc. This information should be easily accessible by the private sector via Caribbean Export platforms. In this regard, it is recommended that a Market Information/Export Desk be established by Caribbean Export to provide market intelligence to companies/exporters in the CARIFORUM region. ***(See details in Annex III to this report).*** Such market intelligence is particularly important for the products that are targeted in the 4th Business Forum (agro-processed foods, natural ingredients for foods, cosmetics and pharmaceuticals).

ii) Building consumer confidence and maintaining established demand side networks through the development of sector-specific, regular communication tools – e.g. monthly 'cocoa newsletters' highlighting quality and uniqueness of CARIFORUM fine or flavour cocoa, success stories, key companies, events, EU retail points, etc.;

iii) Building a 'one-stop' shop for CARIFORUM products to facilitate buyer conversion. This does not necessarily need to be an e-commerce platform, but at least a platform that provides information, including contact information on CARIFORUM suppliers – much in the same way currently being done on the 4th CARIFORUM-EU Business Forum website platform;

iv) Similarly, building a database of EU buyers and distributors which CARIFORUM businesses could access;

v) Optimally, Caribbean Export should develop and maintain relationships with buyers and distributors and be seen by these as a trusted source of information from both the Caribbean and the EU perspectives. This could lead to the provision of 'introduction' services, where Caribbean Export could introduce export-ready CARIFORUM suppliers to reliable buyers and distributors in the EU, which would reduce conversion time. This should be done on an ongoing basis, not only at *ad hoc* events such as Business Forums.

To deal with the logistical challenges in shipping to the EU, small producers might **also consider utilizing fulfilment services to support shipping to their target market**. A fulfilment service is a third-party warehouse service which prepares and ships orders on behalf of the producer. The range of services offered by fulfilment centres includes warehousing, shipping, inventory management, packaging, handling returns, and more. Amazon offers a fulfilment service, Fulfilled by Amazon, including a solution called the European Fulfilment Network.[25] This enables Amazon to fulfil orders from any Amazon European marketplace while goods are shipped by the producer to just one centre. Cross-border fulfilment fees apply. But there are various fulfilment service companies across the EU. **It may be useful to research the conditions under which these companies would provide services to goods producers from the CARIFORUM region.**

The diplomatic missions of CARIFORUM countries in the EU also should play a greater role in helping facilitate business activities by their companies in the EU. This should include the provision of economic intelligence to their Chambers of Commerce and individual companies that seek market information. **This will require a dedicated Trade Facilitation Officer desk in each mission.** It is recommended that the trade ministries and foreign service officers dedicate resources to ensuring staff is acquainted with the EPA.

5.2 For Caribbean Service Suppliers

The presence of natural persons (Mode 4 under the GATS) remains the means through which CARIFORUM service suppliers can best contest the EU market for services. As part of the 10-year review of the EPA, CARIFORUM and EU authorities should ensure that formal, detailed responses are provided by EU Member States to the following questions:

i) Have administrative measures been established in your immigration and/or work permit regulations to facilitate the entry of the following categories of service suppliers from the 15 CARIFORUM countries into your jurisdictions to supply services to clients there, subject to the provisions in the EPA: Contractual Service Suppliers (CSS); Independent Professionals (IPs); Business Services Sellers; and Short Term Visitors for Business Purposes?

ii) What specific type of documentation or authorization is required by a service supplier from a CARIFORUM member country to supply services in your jurisdiction or territory – a work permit, or some other special document? And what is the process or procedure for obtaining this? (These should be catalogued and listed on the EC's (DG Trade) website and those of all CARIFORUM Trade ministries and Caribbean Export)

iii) Have any service suppliers from any of the 15 CARIFORUM countries been granted entry to supply services under Mode 4 in your country as provided for under the EPA over the past nine (9) years? If so, which categories – CSS or IP?

In principle, this information should be obtained and catalogued for all EU Member States but at least for the jurisdictions in which CARIFORUM service suppliers have market access interest. (Germany, France, Italy, UK, Ireland, Belgium, Spain, Portugal, Netherlands, Denmark, Sweden, Malta, Greece, Austria, Czech Republic, Finland).

In light of the imminent departure of the UK from the EU, it may be even more important for CARIFORUM service suppliers to know what are the requirements and procedures in other EU

[25] https://sellercentral.amazon.co.uk/gp/help/external/201606080

Member States in order to realize the Mode 4 market access provisions in the EPA. Languages and business cultures in the rest of the EU make this more critical.

For Creative Industries

i) All Caribbean diplomatic missions in Europe should be given a mandate to help promote Caribbean music and culture, including carnivals. This should be an intrinsic part of their work and institutionalized. It should not depend on personalities in missions. Caribbean carnivals and music festivals/concerts in the EU provide economic opportunities for artists in the region and help generate interest in the Caribbean and various products and services, including Caribbean tourism.

ii) Caribbean Export should work with Trade Ministries and Caribbean missions in the EU to promote and sensitize diplomatic staff in the EU about the economic potential of music and carnival activities in the EU for artists and creative persons in the region and in European cities. Diplomatic missions should also inform all the persons who operate professionally to organize music events and carnivals about the facilities in the EPA that could be of benefit to them.

iii) Caribbean Export and all Caribbean missions in the EU should collaborate to identify and catalogue the persons working in promoting music and carnivals in each EU member state. And a network of music promoters/DJs and carnival promoters should be developed. This is important to allow for greater coordination of performance activities by Caribbean artists in European music festivals and carnival-related events in order to (i) expand and maximize the reach of Caribbean artists across the EU; and (ii) spread the cost of travel expenses across an artists' European tour and thereby increase their cost competitiveness for music festivals and concerts.

iv) A handbook of requirements and procedures for the entry of artists/entertainers in key EU markets (such as Belgium, France, Germany, Italy, Netherlands, Spain, Sweden, Denmark, among others) should be developed and put on the websites of all Trade and Culture Ministries in CARIFORUM states for the benefit of artists and entertainers in the region. The handbook could include information on work permit and visa requirements, withholding taxes on the fees of entertainers, etc. And it should be updated every 2 years.

v) CARIFORUM countries should negotiate bilateral Cultural Cooperation Agreements with key EU Member states. These should include co-production agreements for film. This is provided for in the Protocol on Cultural Cooperation in the EPA but was never realized. But they are necessary in order for various facilities in the Culture Protocol to be implemented such as the granting of Caribbean co-produced creative works domestic "European" status and artist in residence programs, etc.

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ANNEX I: IMPORTS OF SELECTED CARIBBEAN PRODUCTS BY THE EU, 2014-2018

Note: *Data obtained from Eurostat. All figures are in euros. If no imports were recorded from a particular CARIFORUM country for the entire period (2014-18), the country was not included in the table. The data show total imports by all EU Member States (EU-28) from individual Caribbean states.*

HS 21039090 - Sauces and preparations thereof, mixed condiments and mixed seasonings (excl. soya sauce, tomato ketchup and other tomato sauces, liquid mango chutney and aromatic bitters of subheading 2103.90.30)

PARTNER	2014	2015	2016	2017	2018
EU28_EXTRA	426.592.899	458.569.168	491.473.644	513.014.485	522.985.237
Antigua and Barbuda	464	779	728	19.237	3.740
Barbados	300.010	221.192	108.627	164.830	30.290
Belize	2.993	14.905	36.648	37.641	58.493
Dominica	10.672	19.273	7.569	2.200	
Dominican Republic	181.856	209.348	224.025	232.502	246.745
Grenada	1.586	4.062	3.369	2.239	4.569
Guyana				2.488	1.365
Haiti	9			129	964
Jamaica	1.392.750	1.768.416	2.473.921	2.072.478	2.467.841
St Kitts and Nevis	271	187	267		
St Lucia	204.875	155.342	298.466	243.517	291.353
Suriname	208.099	298.155	312.762	516.321	687.566
Trinidad and Tobago	132.699	76.656	217.440	136.104	84.689

HS 1806 - Chocolate and other food preparations containing cocoa

PARTNER	2014	2015	2016	2017	2018
EU28_EXTRA	649.662.166	799.599.534	823.431.755	846.128.543	857.504.465
Antigua and Barbuda				78	
Barbados		1.386	771		-
Bahamas				-	114
Dominica			637	531	160
Dominican Republic	9.940	7.148	23.273	26.083	23.370
Grenada	104.768	81.873	88.636	25.722	39.835
Jamaica	5.853		32.149	1.327	60
St Lucia		186	13.180	117	
Suriname		77		3.211	-

Trinidad and Tobago	229.680	482.869	342.543	418.883	320.754
St Vincent & the Grenadines		6		2.834	36.329

HS 3401 - Soap; organic surface-active products and preparations for use as soap, in the form of bars, cakes, moulded pieces or shapes.

PARTNER	2014	2015	2016	2017	2018
EU28_EXTRA	485.817.678	560.382.813	542.955.931	551.849.460	547.748.589
Barbados					33.553
Bahamas			95	2.241	
Dominica	100	1.200	1.305	1.665	3.812
Dominican Republic	6.578	2.789	2.914	21.762	5.362
Grenada		119		-	
Guyana				-	437
Haiti	1.192	2.553	1.144	5.095	974
Jamaica	19.641	22.493	32.747	30.020	19.516
St Kitts and Nevis			2.176	-	
St Lucia		1.161	154		55
Suriname	4.502	6.180	4.747	5.126	2.371
Trinidad and Tobago	1.989	3.669		-	73
St Vincent & the Grenadines		1.722			

HS 33051000 - Shampoos

PARTNER	2014	2015	2016	2017	2018
EU28_EXTRA	136.559.142	152.784.633	154.445.023	178.958.837	169.605.471
Antigua and Barbuda					
Barbados	145				28.273
Bahamas		302		-	
Dominican Republic	18.002	10.158	36.904	6.181	10.185
Guyana				-	313
Jamaica					28
St Lucia		8			
Suriname	374			-	276
Trinidad and Tobago		165		-	-

HS 3305 - Preparations for use on the hair

PARTNER	2014	2015	2016	2017	2018
EU28_EXTRA	435.703.047	541.327.134	550.930.220	585.486.228	606.938.712
Antigua and Barbuda					
Barbados	16.381				44.460
Bahamas		302		29	
Belize		101		-	-
Dominica	223	48	152		
Dominican Republic	65.124	68.728	79.437	81.887	85.172
Grenada		181		-	
Guyana				-	4.256
Haiti	1.868	5.837	2.528	2.969	944
Jamaica				1.496	297
St Lucia		100			
Suriname		184	200	-	1.260

HS 3304 - beauty or make-up preparations and preparations for the care of the skin, incl. sunscreen or suntan preparations (excl. medicaments); manicure or pedicure preparations

PARTNER	2014	2015	2016	2017	2018
EU28_EXTRA	2.269.922.629	2.809.051.484	3.066.966.844	3.283.448.292	3.439.023.447
Antigua and Barbuda		1.764			73
Barbados	38.657	351	71.668	153.924	15.407
Bahamas	37	60		6.961	569
Belize		26.288	1.118	-	-
Dominica	1.702	2.457	818		9.536
Dominican Republic	16.901	36.608	17.974	24.249	19.524
Grenada	1.050	447		-	
Guyana	348			-	11.426
Haiti	849	253	489	907	831
Jamaica	3.174	154.635	76.208	58.966	2.155
St Kitts and Nevis		164	30.111	6.523	
St Lucia	36.203	7.179	8.756	3.499	3.777
Suriname	286	112		555	252
Trinidad and Tobago	11.131	7.015	40.553	88.723	73.483
St Vincent & the Grenadines		304		536	

HS 071490 - arrowroot, salep, jerusalem artichokes and similar roots and tubers with high starch or inulin content, fresh, chilled, frozen or dried, whether or not sliced or in the form of pellets, and sago pith (excl. manioc "cassava", sweet potatoes, yams, taro and yautia)

PARTNER	2014	2015	2016	2017	2018
EU28_EXTRA	14.779.024	15.767.257	15.861.752	16.118.268	18.847.635
Dominica	52.090	89.636	129.378	114.738	12.135
Dominican Republic	92.122	39.426	56.859	37.482	8.962
Grenada			10.851	6.649	120.864
Haiti					406
Jamaica	1.918.949	1.191.010	1.636.304	1.770.058	2.810.212
St Lucia	3.357	17.873	86.955	49.867	81.486
St Vincent & The Grenadines	531.310	705.143	577.568	519.860	639.922
Suriname	411.576	384.467	223.943	174.071	99.198

HS 091030 Turmeric 'Curcuma'

PARTNER	2014	2015	2016	2017	2018
EU28_EXTRA	15.419.617	22.960.915	28.343.949	33.881.497	34.457.961
Dominica	150	2.481	4.627	23	
Dominican Republic			15.676	19	

HS 151530 - Castor oil and fractions thereof, whether or not refined, but not chemically modified

PARTNER	2014	2015	2016	2017	2018
EU28_EXTRA	172.574.673	199.869.309	190.799.868	225.665.253	230.692.646
Dominican Republic		4.354		-	21
Haiti		1.311		305	756
Jamaica			1.909	13.423	8.528

HS 1513 - Coconut "copra", palm kernel or babassu oil and fractions thereof, whether or not refined, but not chemically modified.

PARTNER	2014	2015	2016	2017	2018
EU28_EXTRA	1.105.609.528	1.255.851.893	1.432.833.287	1.702.020.485	1.405.475.851
Belize					92.406
Dominica				65	
Dominican Republic	44.768	24.904	92.061	97.938	88.617
Guyana				-	1.280
Jamaica	2.421	6.967		-	
Suriname		14.525	2.198	7.419	19.315

Annex II: Time Series of EU-Cariforum Trade

EU-28 Merchandise Trade 2007-20017 with CARIFORUM by HS Section/Chapter (million euro)

Product category	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
						EU28 Imports					
Total Goods	4,003	5,584	3,949	3,867	3,924	3,634	4,409	4,057	4,043	3,176	3,570
Agricultural products (definition WTO UR AoA)	933	935	907	860	808	871	942	932	1,040	1,049	935
Non-agricultural products	3,070	4,650	3,042	3,007	3,116	2,763	3,468	3,125	3,003	2,126	2,635
Fishery products	56	39	39	47	58	63	63	55	74	78	73
Industrial products	3,014	4,611	3,003	2,960	3,058	2,700	3,404	3,070	2,929	2,048	2,562
HS section						EU28 Imports					
I Live animals; animal products	57	41	40	49	59	64	65	56	75	79	74
II Vegetable products	306	333	385	430	393	400	418	447	518	559	477
III Animal or vegetable fats and oils	0	0	0	1	0	0	0	0	1	1	1
IV Foodstuffs, beverages, tobacco	614	589	514	416	403	461	513	471	501	469	431
V Mineral products	637	2,336	1,665	1,283	1,312	898	1,495	937	613	267	506
VI Products of the chemical or allied industries	711	841	461	454	545	604	523	574	771	491	679
VII Plastics, rubber and articles thereof	15	13	12	13	13	16	16	17	18	20	20
VIII Raw hides and skins, and saddlery	4	2	2	3	4	3	4	5	6	5	5
IX Wood, charcoal and cork and articles thereof	12	10	7	11	8	11	11	12	17	16	16
X Pulp of wood, paper and paperboard	2	3	2	2	3	3	2	2	3	3	2
XI Textiles and textile articles	34	25	25	20	23	38	36	40	41	37	39
XII Footwear, hats and other headgear	25	22	26	37	31	36	28	27	39	49	40
XIII Articles of stone, glass and ceramics	1	1	1	1	1	1	1	1	0	0	0
XIV Pearls, precious metals and articles thereof	125	168	165	150	188	184	193	168	178	141	214
XV Base metals and articles thereof	302	289	37	138	187	101	141	158	122	41	64
XVI Machinery and appliances	116	90	53	60	53	63	37	32	43	55	80
XVII Transport equipment	742	627	395	652	405	316	483	714	821	620	497
XVIII Optical and photographic instruments, etc.	80	69	90	65	66	76	97	111	92	105	143
XIX Arms and ammunition	0	0	0	0	0	0	0	0	0	0	0
XX Miscellaneous manufactured articles	5	3	3	2	2	3	2	3	5	3	5
XXI Works of art and antiques	1	2	2	2	10	10	2	1	2	1	1
Other	214	120	62	75	218	347	342	279	177	213	275

Note: statistics subject to corrections

EU-28 Merchandise Trade 2007-20017 with CARIFORUM by HS Section/Chapter (million euro)

Product category	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
						EU28 Exports					
Total Goods	4,720	4,090	3,332	4,338	3,484	4,231	4,222	4,159	5,270	4,950	5,130
Agricultural products (definition WTO UR AoA)	502	513	448	526	527	590	607	689	789	804	863
Non-agricultural products	4,218	3,576	2,884	3,812	2,957	3,641	3,615	3,470	4,482	4,146	4,266
Fishery products	8	6	7	8	10	13	19	13	14	16	21
Industrial products	4,210	3,570	2,876	3,804	2,947	3,628	3,597	3,457	4,467	4,130	4,246
HS section						**EU28 Exports**					
I Live animals; animal products	159	149	120	141	139	150	155	171	192	195	232
II Vegetable products	52	67	64	71	68	79	78	103	100	95	99
III Animal or vegetable fats and oils	19	24	19	25	29	29	30	27	32	33	35
IV Foodstuffs, beverages, tobacco	267	269	244	290	294	335	353	391	467	486	506
V Mineral products	216	315	182	222	95	335	226	301	443	250	441
VI Products of the chemical or allied industries	248	251	235	280	283	325	317	318	362	363	355
VII Plastics, rubber and articles thereof	115	102	98	141	128	127	132	132	156	174	176
VIII Raw hides and skins, and saddlery	5	8	6	10	12	16	15	17	26	26	27
IX Wood, charcoal and cork and articles thereof	14	12	11	10	11	22	15	15	16	18	23
X Pulp of wood, paper and paperboard	121	111	94	102	108	132	122	122	143	128	123
XI Textiles and textile articles	58	59	47	70	70	82	83	78	97	105	102
XII Footwear, hats and other headgear	9	9	9	18	12	11	12	11	12	12	12
XIII Articles of stone, glass and ceramics	96	84	63	75	73	74	87	100	129	150	133
XIV Pearls, precious metals and articles thereof	28	24	33	23	49	32	44	61	93	103	102
XV Base metals and articles thereof	310	313	227	285	243	260	269	237	288	266	320
XVI Machinery and appliances	949	1,032	788	796	913	1,006	1,068	775	1,016	1,121	977
XVII Transport equipment	1,772	978	860	1,457	665	908	948	1,022	1,334	1,042	1,052
XVIII Optical and photographic instruments, etc.	89	65	69	106	104	111	101	103	131	132	114
XIX Arms and ammunition	1	1	2	1	1	1	2	3	1	1	1
XX Miscellaneous manufactured articles	72	89	54	67	80	78	80	74	113	150	162
XXI Works of art and antiques	1	1	1	8	1	1	1	2	3	4	2
Other	117	126	106	139	106	115	82	97	118	95	134

Note: statistics subject to corrections
Source : Eurostat COMEXT R4 13-Jul-2018

EU-28 Merchandise Trade 2007-20017 with CARIFORUM by HS Section/Chapter (million euros)

Product Category	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
					EU28 Trade Balance						
Total Goods	717	-1,495	-617	472	-440	597	-187	102	1,228	1,775	1,560
Agricultural products (definition WTO UR AoA)	-431	-421	-459	-334	-281	-281	-335	-243	-251	-245	-72
Non-agricultural products	1,148	-1,074	-158	805	-159	878	148	345	1,479	2,020	1,632
Fishery products	-48	-33	-31	-38	-48	-50	-45	-42	-60	-62	-52
Industrial products	1,195	-1,041	-127	844	-111	928	192	387	1,539	2,082	1,684
HS section					EU28 Trade Balance						
I Live animals; animal products	101	108	80	92	80	86	91	115	116	116	159
II Vegetable products	-253	-266	-321	-358	-325	-321	-339	-344	-418	-464	-378
III Animal or vegetable fats and oils	19	23	19	25	28	28	30	26	31	32	33
IV Foodstuffs, beverages, tobacco	-347	-319	-270	-127	-110	-125	-161	-81	-34	17	75
V Mineral products	-422	-2,021	-1,483	-1,062	-1,217	-563	-1,269	-635	-171	-17	-65
VI Products of the chemical or allied industries	-463	-590	-226	-174	-262	-280	-206	-256	-409	-128	-324
VII Plastics, rubber and articles thereof	100	89	85	128	116	111	117	115	138	154	155
VIII Raw hides and skins, and saddlery	1	5	4	7	8	12	11	12	20	21	22
IX Wood, charcoal and cork and articles thereof	2	2	4	-1	3	11	4	3	-1	2	8
X Pulp of wood, paper and paperboard	119	109	92	100	106	129	120	119	140	125	121
XI Textiles and textile articles	24	34	22	50	47	45	47	38	56	68	63
XII Footwear, hats and other headgear	-16	-13	-17	-20	-20	-25	-16	-16	-26	-37	-28
XIII Articles of stone, glass and ceramics	96	84	63	74	72	74	86	99	128	149	132
XIV Pearls, precious metals and articles thereof	-97	-144	-132	-127	-139	-151	-149	-107	-85	-37	-112
XV Base metals and articles thereof	9	23	190	147	56	159	128	79	166	225	255
XVI Machinery and appliances	833	941	735	735	859	943	1,031	743	973	1,065	898
XVII Transport equipment	1,030	351	466	805	260	593	465	308	513	422	555
XVIII Optical and photographic instruments, etc.	9	-4	-21	41	38	35	4	-8	39	28	-29
XIX Arms and ammunition	1	1	2	1	1	1	2	3	1	1	1
XX Miscellaneous manufactured articles	67	86	51	65	78	76	78	70	108	147	158
XXI Works of art and antiques	0	-1	-1	5	-9	-9	-1	1	1	4	1
Other	-97	6	43	64	-112	-232	-260	-183	-58	-118	-141

Note: statistics subject to corrections

Source : Eurostat COMEXT R4 13-Jul-2018

ANNEX III: PROPOSAL FOR A MARKET INFORMATION/EXPORT DESK RE THE EUROPEAN UNION

Background/Rationale
A commonly articulated need in the CARIFORUM region is for real-time, 'on-the-ground' market intelligence with respect to target export markets in the European Union (EU). This could include: pricing information, regulations governing particular products, sector trends, labelling and packaging trends, existing and emerging competition, potential customers, and more generally, export opportunities.

As the vast majority of businesses in the region are micro and small, they have limited resources or capacity to undertake market research, let alone acquire the market intelligence necessary to empower them to make strategic business decisions. While market research is available online or is otherwise accessible in the public domain, market intelligence is significantly more difficult to acquire. It requires an 'ear to the ground', typically via a research officer stationed in the target market, a strategic in-market partner or through regular market intelligence missions to the market. These options tend to be out of the reach of the large majority of businesses in CARIFORUM.

While many CARIFORUM member states do indeed have national representatives in key markets abroad, including the UK, at best, the role of these persons is generally investment seeking and tourism promotion. Little focus has been made in providing national exporters with the stream of current intelligence required to strategically penetrate an export market. Relatedly, the capacity of foreign service officers (in overseas diplomatic missions) to acquire and provide the level of intelligence required has also not been developed.

The ramifications of not being able to access market intelligence is a lost opportunity for exporters and would-be exporters, as well as sub-optimal market penetration strategies, which may result in increased time and/or expenses as it relates to market penetration and possibly failure to successfully contest the market.

It is therefore proposed that a Market Information/Export Desk be established by Caribbean Export to provide market intelligence to companies/exporters in the CARIFORUM region.

Intended Beneficiaries:
The direct beneficiaries of the Market Information/Export Desk will be medium and small exporters and would-be-exporters across CARIFORUM. In the short-term the desk will focus on the priority agriculture and manufacturing sectors, but as capacity is built, the sectors of focus will be expanded.

Implementing Organization:
It is proposed that the persons running the Market Information/Export Desk in the EU report to and are managed by Caribbean Export and that they should also respond to information requests

from Chambers of Commerce across CARIFORUM. Once established, the Export Desk should be widely publicized and should be on the websites of all business organizations in the region.

DESCRIPTION OF PROPOSED INITIATIVE

Project Overview:
Many similarities exist between producers and exporters in the CARIFORUM region, both in terms of offerings, capacity and even target markets. CARIFORUM producers and exporters will therefore be seeking the same or similar information with respect to the UK market. Accordingly, it is not cost-effective or strategic for the numerous CARIFORUM member states to each train and place export officers in the market to provide similar information back to the private sector – nor is it feasible, given the tough economic realities of the region today.

Rather, to meet the information needs of producers and exporters, it is proposed that a UK Export Desk be established. The role of the Export Desk would be to provide up-to-date intelligence with respect to key regional exports on an ongoing basis. Additionally, the export desk would provide responses to market intelligence requests from business support organizations, producers and exporters in the region on a needs-basis. All information would be shared transparently to subscribers via an e-platform, as well as through targeted email marketing campaigns to ensure that businesses have access to the most up-to-date information.

The Export Desk would also support market linkages activities, such as the facilitation of introductions and B2B virtual meetings, supporting inbound and outbound trade missions, as well as other CARIFORUM initiated, trade related projects involving the UK.

The desk would be run ideally by at least one Market Intelligence Consultant and one Information Consultant. In principle, these officers would be employees of Caribbean Export. The Market Intelligence Consultant should be based in the EU. He/she would be responsible for responding to requests for market information from Chambers of Commerce in CARIFORUM, and acquiring intelligence through on-the-ground efforts, such as visiting distributors and retailers in various cities and undertaking meetings with business entities in the UK or with agricultural/manufacturing bodies. The Information Consultant would be responsible for maintaining the information portal and the customer relationship management (CRM) system, sending out targeted information updates to subscribers and marketing the service. She/he should also provide continuous information on specific trade fairs in EU markets that are relevant to companies/exporters from CARIFORUM.

The long-term strategy, once the structure, e-platform, communication channels and marketing campaigns are well-established, would be to ensure that the is self-sufficient by charging a fee to subscribers to the site, as well as an additional fee to those seeking company-specific market intelligence. Consideration can also be made to commission-based compensation.

The Market Information/Export Desk would be linked to a CARIFORUM Export Information Portal, providing a 'one-stop-shop' for all information needs related to exporting to specific EU markets and for particular product categories.

Overall Aim of Project
The overall aim of the project is to increase exports between CARIFORUM and the EU by providing one-the-ground, real-time market intelligence.

More specifically, it is expected that through the timely provision of relevant market intelligence and accordingly, more informed decision-making, exporters in CARIFORUM would benefit from:

- Increased speed to market;
- Reduced market penetration costs;
- Enhanced access to export opportunities;
- Enhanced scope for strategic alliances;
- Improved market penetration success.

Specific Objectives
The specific objectives are:

- To provide up-to-date intelligence on key CARIFORUM products on an ongoing basis;
- To provide opportune responses to market intelligence requests from business support organizations, producers and exporters in the region, on a needs-basis;
- To support market linkages activities including the organization of inbound and outbound trade missions to the EU and B2B matchmaking;
- To ensure that CARIFORUM producers, manufacturers, exporters and would-be-exporters are aware of the export desk and its offerings through social media campaigns, email marketing, and the website (e-platform).

Expected Impact(s)
Expected impacts include:

- Enhanced performance in the EU market by CARIFORUM firms; Improved competitiveness as a result of better market intelligence

Expected outcome(s)
Expected outcomes include:

- Increased trade from CARIFORUM to the EU;
- Increased foreign exchange;
- Increased earnings for subscribers to the Market Information desk.

Proposed Activities
Activities include:

- Developing an export portal which will serve to both capture and share information including profiles of CARIFORUM subscribers, profiles of EU partners, market intelligence requests and market intelligence;
- Confirming CARIFORUM priority agricultural and manufactured products vis-à-vis the EU market;
- Establishing key target cities for priority products for the short, medium and long term;
- Developing a market intelligence template which will be utilized to capture information on each priority sector;
- Acquiring market research for priority products through on-the-ground research;
- Providing market intelligence through export portal to CARIFORUM stakeholders;

- Undertaking marketing and awareness building activities;
- Reporting to Caribbean Export on a regular basis.

Previous Donor Interventions
There have not been previous initiatives of this kind.

ANNEX IV: LIST OF COMPANIES SURVEYED OR INTERVIEWED

IN CARIFORUM

COMPANY NAME	PRODUCT	COUNTRY	CONTACT	WEBITE
NATURAL PRODUCTS				
Global Stars International Import and Export	wide range	Guyana	Bishan Ganpat	www.globalstarsinternational.com
Specialized Medical Supplies Limited	hair and skin products	Jamaica	Michelle Hines	www.natureslinejamaica.com
Perishables Jamaica (Tops Teas)	tea	Jamaica	John Mahfood	http://topsjamaicanteas.com/
Herboo Corporation Limited	hair and skin products	Jamaica	Javin Williams	www.herboobotanicals.com
Sugar Town Organics	bath products	St. Kitts and Nevis	Anastasha Elliott	www.sugartownorganics.com
Cocoa Research Centre - UWI	cocoa	Trinidad and Tobago	Path Umaharan	www.cocoacentre.com
Jays Enterprises Inc	sauces, seasonings	Barbados	Ingrid Brathwaite	www.superbblends.com
Hot Mama's Belize Limited	hot sauces, condiments	Belize	Wilana Oldham	www.hotmamasbelize.com
Home Choice Enterprises	sauces, seasonings	Jamaica	Kareema Muncey	www.homechoicejamaica.com
King Pepper Products Limited	sauces, seasonings, jams	Jamaica	Christine Wong	www.eatonsjamaica.net
Baron Foods	sauces, seasonings	Saint Lucia	Ronald Ramjattan	www.baronfoodsltd.com
Vincyfresh Limited (Winfresh)	sauces, syrups, juices	St. Vincent	Shelly Ann Fraser	www.winfresh.net
Gom Food Industries N.V.	sauces	Suriname	Ruth van Gom	www.sishado.com
RUM				
Antigua Distillery Limited	rum and liquors	Antigua	Calbert Francis	www.antiguadistillery.com
Chicharon	rum	Dominican Republic	Gustavo Cruz Jerez	www.chicharon.com
Ron Veleiro	rum	Dominican Republic	Luis Beltre	http://ronveleiro.com

COMPANY NAME	PRODUCT	COUNTRY	CONTACT	WEBITE
Vinicola del Norte	rum	Dominican Republic	Emmanuel Garcia	www.ronmacroix.com
Wray & Nephew	rum	Jamaica	Kamal Powell	www.camparigroup.com
CREATIVE & CULTURAL INDUSTRIES				
J. Ventures International	Artist management	Barbados	Jardine Yard	www.jventuresintl.com
Talent Animation Team	Animation	Barbados	Aisha King	http://thezanaseries.com/
Headline Entertainment	Artist management	Jamaica	Jerome Hamilton	http://headlinejamaica.blogspot.com/
Liquid Light Digital/Jamrock Animation	Animation	Jamaica	Adrian Lopez	www.liquidlightdigital.com
Malfinis Film and Animation Studio Inc.	Animation	Saint Lucia	Brandon Scott	www.malfinisproductions.com
Full Circle Animation	Animation	Trinidad and Tobago	Jason Lindsay	www.fullcircleanimation.com
Koru Green Limited	Artist management	Trinidad & Tobago	Keron Niles	

IN THE EUROPEAN UNION

COMPANY NAME	COMPANY TYPE	COUNTRY	CONTACT	WEBSITE
IMPORTERS OF GOODS				
Exotic World	Wholesaler/retailer	Belgium	Thierry Torfs	www.exoticworld.be
Unidex	Wholesaler/retailer	Netherlands	Ingrid Janssens	www.unidexholland.com
Sunland Caribbean Foods	Wholesaler/distributor	UK		www.sunlandcaribbean.co.uk
Nuevo Progreso	Importer	Czech Republic	Lucie Hovorková	www.front-line.cz
Blakka Shipping		Netherlands		www.blakkashipping.eu
Coverpoint RCM Business Solutions	Business development	Belgium	Anthony Brand	
Wanis International Foods	Importer/Distributor	UK	Prashant Barvan	www.wanis.com
Zenobia	Importer/Distributor	Belgium	Patrick Cosse	http://www.zenobia.be/

COMPANY NAME	COMPANY TYPE	COUNTRY	CONTACT	WEBSITE
Impact Foods International	Superfoods wholesaler/retailer	UK		www.impactfoods.co.uk
Engel Foreign Food	Importer/Distributor	Netherlands	Marcel Beemsterboer	www.engelforeignfood.com
EUROPEAN INVESTORS IN THE CARIBBEAN				
Akuo Energy	Renewable energy	France	Joanna Lantz	http://www.akuoenergy.com/fr/
Noval Properties	Tourism development	Spain	Cesar Latrilla Rodero	www.novalproperties.com
Teleperformance	BPO (customer service)	France	Quy Nguyen	www.teleperformance.com/fr
BAS Projects Corporation	Renewable energy	Spain	Gorka Capel	www.bascorporation.com
CARIBBEAN INVESTORS IN EUROPE				
Tropifruit	Integrated importer/ exporter/distributor	UK	Amelia Cocco	https://tropifruit.co.uk/
CHG InterTrading	Wholesale/Business development	UK	Rolfi Chevalier	
Zebu Partners	Financial investment	UK	Jose Buera	
CREATIVE INDUSTRY COMPANIES				
Antilliaanse Feesten	Caribbean music festial	Belgium	Lode (Louis) Verscheuren	https://antilliaansefeesten.be/
D-One Jammasters	DJ/music promoter	Germany	Daryl Rudolfo	
Triniconnection	Music & Carnival promoter	Netherlands	Kwame Cruden	
Spiceland Entertainment	DJ & Music promoter	Netherlands	Rondel Heyliger	
Neon Rouge Production	Film producer (world cinema)	Belgium/France	Aurelien Bodinaux	https://neonrouge.com/