BARBADOS PRIVATE SECTOR ASSOCIATION

BARBADOS PRIVATE SECTOR TRADE TEAM

EXPORTING TO THE EU

EXPORT GUIDE & ACTION PLAN

FRESH FOODS

IDB

FOMIN Multilateral Investment Fund Member of the IDB Group

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INTRODUCTION

This export guide and action plan is one of a series of deliverables from the project *Building Private Sector Capacity to Increase Exports* sponsored by the Barbados Private Sector Association (BPSA), through the support of the Inter-American Development Bank (IDB). As the project title suggests, it is intended to elaborate possible opportunities for building export capacity among Barbadian producers to access the EU market, within the context of the Economic Partnership Agreement (EPA). Based on five months of extensive secondary research conducted in 2012, as well as consultations with Barbados based stakeholders and the Project Steering Committee, which is comprised of leading private sector associations, the research is part of a series of four projects that will strengthen the BPSA in its role as a key participant in public policy debates affecting private sector development; while increasing awareness of changes and challenges that confront the sector.

The purpose of this report is to propose an export guide and action plan for the enhanced positioning of the Barbadian fresh foods (fruits, vegetables and specialty meats) sector within the European Union (EU), in order to take advantage of the new market access opportunities created by the Economic Partnership Agreement (EPA). The EU is a unique economic and political partnership between 27 countries. Operating as a single market, the EU is a major world trading power with an estimated GDP of €12,268,387 million in 2010.[1] With just 7% of the world's population, the EU's trade with the rest of the world accounts for around 20% of global exports and imports. The EU is the world's biggest exporter and the second-biggest importer. Approximately two thirds of EU countries' total trade is done with other EU countries. The United States is its most important trading partner, followed by China. The EPA is a unique agreement which positions both the CARIFORUM and EU countries to benefit from special terms of trade, ultimately on a reciprocal basis, including duty free and quota free market access. The agreement has implications for the possibilities for sourcing of inputs as well as market penetration of goods and services and attraction of foreign direct investment by both parties.

This export guide and action plan begins with this introduction and a brief background to the plan's context; including an overview of the EU regulatory environment, market requirements and definitions for a beverage as well as a brief summary of the CARIFORUM EPA. This is followed by an overview of the EU market for fresh foods. High potential segments identified through the earlier research are indicated, as well as critical success factors for developing export industries in these foods. A situational analysis of the fresh food sector in Barbados, including a SWOT Analysis in relation to developing exports to the EU based on consultation with local stakeholders precedes an outline of some references to assist exporters in developing their value chains. The report concludes with a proposal for an export development strategy and action plan to address the current gaps in building the sector's capacity to export to the EU. The export guide and action plan is not intended as a substitute for legal or marketing advice and no liability will be assumed by the BPSA or its authors arising from the use or interpretation of the information contained herein.

[1] http://europa.eu/about-eu/facts-figures/economy/index_en.htm

BACKGROUND

This action plan is based on a sector study completed earlier with a special focus on the market prospects for Barbadian producers in the EU 27; including an assessment of the value chain for fresh foods and the market opportunities and market access requirements for these products. The research outcomes formed the basis of a workshop on technical regulations and sanitary and phytosanitary measures for Barbadian stakeholders, which was vital to the completion of the proposed action plan. The major focus of the earlier sector study and consultations was the compilation of technical regulations which Barbadian exporters are required to meet in exploring their potential to export to the 27 member states of the EU. EU market requirements can be legal requirements or non-legal requirements. Legal requirements, otherwise known as technical regulations are trending towards harmonization across EU states and represent the minimum requirements that products marketed in the EU must meet. Products that fail to meet these requirements are not allowed on the EU market. Non-legal requirements offer buyers and producers various options in the form of standards and may have varying preferred status across countries. Non-legal requirements go beyond legislation, as companies (buyers) can go further in their requirements than legislation. The main categories of additional requirements are environmental requirements and social (labour) requirements.

The difference between a standard and a technical regulation therefore lies in the issue of compliance. While conformity with standards is voluntary, technical regulations are by nature mandatory. While the research focused on harmonized mandatory regulations enshrined in legislation and immediately pending future legislation, exporters are advised that additional national legislation and specific buyer requirements for particular marketing channels may also apply.

There is an abundance of EU legislation which could potentially affect food and beverage products seeking entry to Europe Many producers view these legislative hurdles and technical standards as technical barriers to trade. However, these regulations are imposed equally on EU producers and it is also possible to make the case for the need for these market requirements in order to regulate the protection of consumers and the environment from potential dangers. At the very least, where Barbadian producers are interested in positioning themselves to take advantage of the potential market opportunities, they will have to familiarize themselves with these market requirements in order to engage European buyers in dialogue. The significant responsibilities which buyers hold under European law and the high levels of accountability to which they are held are an important feature of the market requirements. This means that engaging buyers in early dialogue provides the basis for successful market entry and future collaboration. The EU business environment is very dynamic and responsive to both the high levels of advocacy and lobby on the part of its producers and also the general welfare of its citizens. Legislative changes are ongoing. Exporters are therefore advised to remain in close communication with potential buyers on all issues pertaining to prospective market entry.

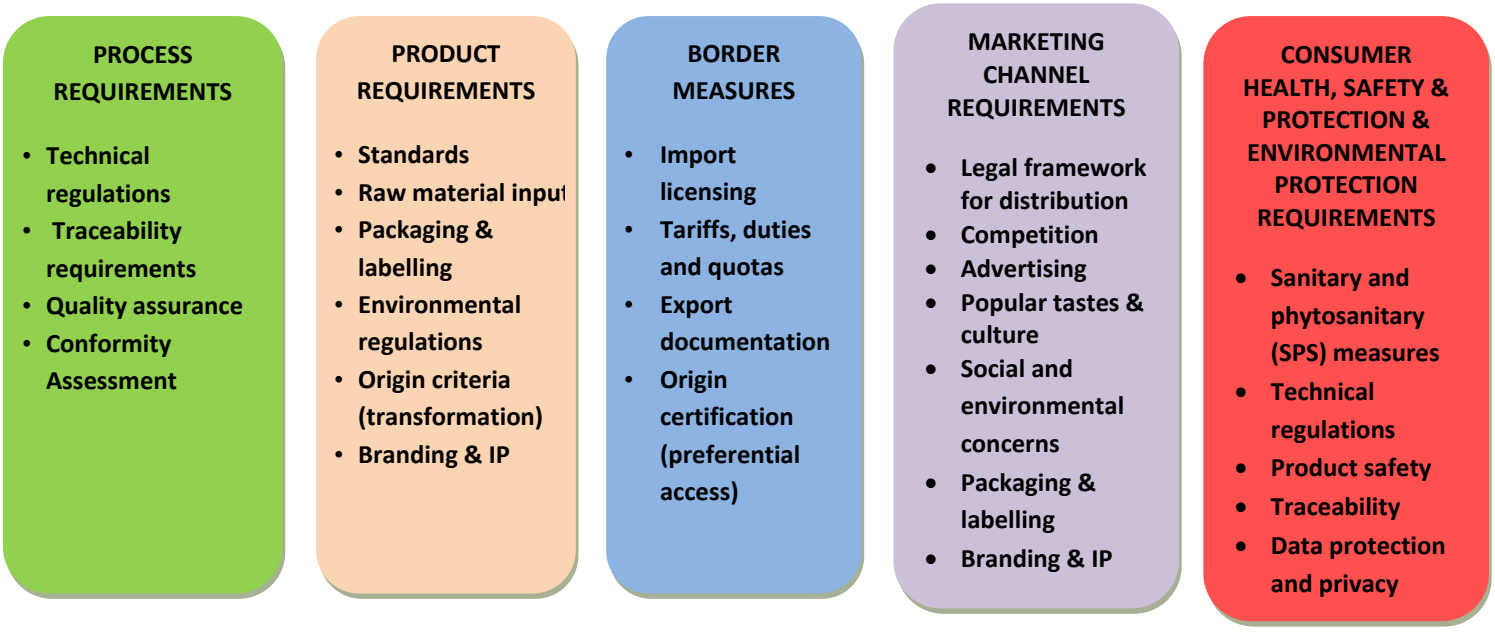
Understanding Market Requirements

Market access and penetration for the exporter is conditional on meeting general and specific market requirements. Market requirements may vary widely between countries. They may take the form of:

- **Process requirements**: for example; scientifically based technical regulations in relation to specific hazards, use of batch coding and other systems which impact traceability
- **Product requirements:** including standards and mandatory legislation affecting packaging and labelling
- **Border measures:** including mandatory licensing procedures and or requirements for import permits
- **Marketing channel requirements**: for example, the expectation of usage by producers of barcodes and other specific inventory and/or product management systems in certain marketing channels, specific quality requirements which may be required access specific marketing channels (i.e. wholesale, retail, hotel supply, restaurant supply, etc.)
- **Consumer Health, Safety and Protection requirements:** for example, sanitary and phytosanitary measures and data protection and privacy measures.

Figure 1 below illustrates further examples. Because each of the market requirements can act as a barrier to accessing and penetrating a new market, a successful exporter begins the process of investigating market potential with research to identify the requirements for trading legally within the market.

Figure 1: Market requirements to be considered by exporters seeking market access and penetration



Sanitary and phytosanitary regulations

Sanitary and phytosanitary regulations are also critical in the management of the supply chain for fresh foods. “Sanitary measures” are concerned with the life or health of humans or animals; “phytosanitary measures” are concerned with plant health. SPS measures take many different forms and include any measure applied, to protect:

- animal or plant life or health against entry, establishment or spread of pests, diseases, disease-causing organisms, etc.
- human or animal life or health against risks from additives, contaminants, toxins or disease-causing organisms in foods, beverages, etc.
- human life/health against risks from diseases carried by animals, plants or their products, or from pests
- prevent or limit other damage from pests

All SPS measures have the common purpose of protecting something (human, animal or plant life or health) against certain specified risks.

In general terms, the WTO Agreement on the Application of Sanitary and Phytosanitary Measures defines the rights and obligations of the Member countries of the World Trade Organization in relation to their use of food safety requirements, and biosecurity controls. The basic aim of the SPS Agreement is to maintain the sovereign right of any government to provide the level of health protection it deems appropriate while ensuring that these sovereign rights are not misused for protectionist purposes and do not result in unnecessary barriers to international trade. The SPS Agreement requires that SPS measures have an objective basis. In particular, all SPS measures must be based on scientific principles, and cannot be maintained without sufficient scientific evidence unless they are provisional measures that have been put in place until the relevant information can be collected.

The CARIFORUM EPA in Brief

At the end of 2007, the first comprehensive Economic Partnership Agreement (EPA) was agreed through various rounds of discussion, consultation and negotiation between the EU and CARIFORUM (Caribbean Forum of ACP States, comprising CARICOM plus the Dominican Republic). The EPA is a successor, reciprocal trading agreement which replaced the long standing unilateral preferential access to European markets enabled by the Cotonou Agreement with ACP countries. The EPA Agreement was signed in October 2008 and is provisionally applied as from 29 December 2008. In addition to the reciprocal relationship, the EPA modernizes the provisions for trade and development, by the inclusion of provisions aimed at boosting goods trade, as well as trade in services; investment; intellectual property and a wide range of other trade-related areas. Sustainable development and regional integration are major themes running through the agreement, which includes development cooperation provisions. The EPA also establishes new joint oversight bodies for the implementation of the agreement and provides for ongoing monitoring and review. As of the 12 of June 2012, 4 out of 15 CARIFORUM countries and 10 out of 17 EU countries have ratified the agreement, enshrining the provisions in national legislation. The agreement will continue to be provisionally applied until ratification is complete. In principle, effective January 1, 2008, the EU has liberalized market access for most beverage products through the EPA. Duty-free and quota free (DFQF) access is provided for 98% of

trade in goods and 94% of trade in services immediately, as of the effective date of January 1, 2008 (CAPRI, 2009).[2]

The EU Common Agricultural Policy (CAP) and Marketing Standards for Fresh Food

Agricultural production in the EU has traditionally been and remains, protected by a complex tariff structure, with high rates and tariff quotas, and benefits from high levels of domestic support and export subsidies. These features are derived from the EU Common Agricultural Policy (CAP), which enables a complex system of subsidies, import duties and differentiated price support, weighing the balance of market opportunities heavily in favour of EU producers. At the local level, the CAP essentially offers subsidies and systems guaranteeing high prices to farmers, thereby providing incentives for them to produce more. In addition, financial assistance is provided for the restructuring of farming, farm growth and management of technology skills for adaptation to economic and social conditions. Certain measures were introduced in the form of help for early retirement, professional training and the development of less favoured regions.

The common organization of agricultural markets In order to enable the coordination of subsidies and production within the internal market is a feature of EU fresh food markets, linked to the CAP. The framework for common organization is supported by legislation that states that imports of one or more products of the sectors identified are subject to import licences, which are in turn subject to the lodging of a security guaranteeing that the products will be imported during the term of validity of the licence. Except in cases of force majeure, the security shall be forfeited in whole or in part if the import is not carried out, or is carried out only partially, within the period of validity of the licence. The institutional support mechanism which manages the common organization of markets is known as a common marketing organization (CMO). The application of standards for the marketing of agricultural products is intended to enable a uniform approach to classification and pricing. The application of such standards is therefore in the interest of producers, traders and consumers. Accordingly, marketing standards have been established which relate, in particular, to quality, grading, weight, sizing, packaging, wrapping, storage, transport, presentation, origin and labelling within the CMOs for bananas, olive oil and table olives, live plants, eggs and poultry meat.

Despite the stated intention that the CAP system should be based on the undertakings accepted under the Uruguay Round of multilateral trade negotiations, the policy has always been somewhat controversial, since its operation creates significant obstacles for market entry for agricultural products from other countries, in effect a system of non-tariff barriers. As such, with the continued maintenance of the CAP, it will be challenging for developing countries to gain market entry in these sensitive sectors and compete, particularly in the areas of primary production. Despite this, in principle, under the EPA, the EU has liberalized, duty-free and quota free (DFQF), 98% of trade in goods and 94% of trade in

[2] Source: CAPRI (2009), The Long-term Impact of EPA in the Caribbean: Jamaica and St. Lucia, A Working Paper, retrieved from http://www.slideshare.net/testing123456/economic-partnership-agreement-epa-st-lucia

services immediately, effective January 1, 2008. This includes agricultural products such as beef, dairy, cereals, fruits and vegetables which can meet the marketing standards established in the relevant sectors. Custom duties have been removed from sugar and rice, while quotas will be eliminated on a phased basis. Bananas will be afforded DFQF access to the EU market (CAPRI, 2009).

Definitions

The EU fresh food sector is not homogenous, and comprises two broad categories of food, which have not undergone any preservation process other than chilling, freezing or quick-freezing. These categories are **food of plant origin** and **food of animal origin**. The Codex Alimentarius classification of food and animal feed commodities recognizes five types of fresh (unprocessed) or "primary" foods in each of these categories, as shown in Table1 below.

Table 1: Types of fresh (primary) foods

Class	Description	Type
Class A	Primary Food Commodities of Plant Origin	01 Fruits 02 Vegetables 03 Grasses 04 Nuts and Seeds 05 Herbs and Spices
Class B	Primary Food Commodities of Animal Origin	06 Mammalian products (incl. meat and offal) 07 Poultry products 08 Aquatic animal products 09 Amphibians and reptiles 10 Invertebrate animals

OVERVIEW OF KEY EUROPEAN FRESH FOOD MARKETS

Export of fruit to the EU market is defined by a number of market requirements in the form of compulsory regulations and voluntary standards related to food safety, environmental protection, social responsibility and quality requirements. These requirements exist at every level of the value chain, beginning with legislation on sustainable use of pesticides and continuing through to issues of plant protection and the regulation of active substances in packaging materials. Sustainable fruit is any kind of fruit that has been produced, processed, transported and/or traded with minimal ecological and socio-cultural impacts and/or provides economic benefits to a impoverished local community or host country (CBI, 2011). This niche has become important in recent years. Organic fruits are fruits produced using environmentally sound methods that meet the minimum EU standards. Fair trade labels are provided by non-governmental organizations (NGOs) such as the Fair Trade Labelling Organization. These NGOs have their own standards which can be found on their websites. Certified fruit is fruit that originates from a company that has undergone a voluntary procedure including periodical audits and gives assurance that its activities meet specific standards. After successful certification the accompanying label can be used to show others your sustainability performance.

A harmonized approach to standards, including marketing standards has served the EU interests of advancing the internal market; however their large number and the technical nature of the requirements often prove burdensome for small producers from developing countries. As such, collaboration of exporting producers through sector specific associations is critical to their likely success in achieving economies of scale, but also market entry and penetration, given some movements towards consolidation of dominant players in the marketplace, and the increasing importance of the issues of social and environmental sustainability of production

Market and Growth forecast

Fresh fruit

According to the European Fresh Produce Association Freshfel, based on 2009 data, European fresh fruit production is slightly below 37.7 million metric tonnes. The apples and pears category represents 33.8% of the production, citrus almost 20%, stone fruits around 19% and table grapes around 7%. Fruit production has been stable over the last few years but remains variable given climatic conditions. Freshfel states that after a sharp decrease in 2009, the per capita fresh fruit consumption within the EU-27 again declined significantly in 2010 by 7.8%, an effective decrease of 9.4% in comparison to the average consumption of the previous five years.[3] Although not specifically indicated by Freshel, this decline may be linked to the recessionary climate prevailing in the EU, since CBI advises that a link has been observed between household expenditure in times of economic growth and greater levels of consumption, particularly in the case of exotic fruit. EU consumers are increasingly health-aware and buy more food products that have specific health benefits. Italy and Spain are the leading producing countries, each representing close to 29% and 24% of all EU production respectively. While a significant part (approximately 61%) of fruit and vegetable production is marketed or processed on the local market of the Member State where the product has been grown, consumer choice is complemented by fresh fruit and vegetables originating from the other Member States.

Fresh vegetables

The EU market is large and stable market for fresh vegetables of different varieties. Some sources indicate that with large volumes of internal production and fierce competition among producers seeking to enter the market, the vegetable market in the EU is largely saturated. As a result, CBI advises that growth of the vegetable market is predicted to be slow. Between 2007 and 2011, the markets for imports of vegetables in Germany, France and the Netherlands, all grew by just over one percent. Furthermore, there is evidence from the recent economic crisis, that the vegetable market is influenced by economic deterioration. Imports are increasing at the expense of EU producers, with consumption in the new Eastern EU member states expected to grow fastest. According to the Centre for Promotion of Imports from Developing Countries (CBI), imports from developing countries are growing faster than overall imports. This is in part because of seasonality due to weather conditions, which result in the EU being dependent on suppliers from third countries. Weather conditions in the main producing member states of the EU are increasingly unpredictable. This affects the quality of the produce, lengths of the

[3] Retrieved from http://www.freshfel.org/asp/what_we_do/consumption_monitor.asp in August 2012

off-season and demand for imports. Generally, longer EU off-seasons provide enhanced opportunities for suppliers from developing countries.

In general, vegetables are highly perishable and have a short shelf life; hence, the bulk of supply comes from within the EU or in close geographic proximity. However, increasingly, innovations in packaging and transport are now allowing producers the possibilities of extended shelf life, sea freight, more competitive prices, premiums and new markets. In the future, it is expected that developing countries as well as other countries that enjoy preferential trade agreements will continue to gain EU market share. It is proposed that, companies that are in full control of the supply chain (sourcing, planning and logistics) and that tailor their products to customers' needs will be best placed to capitalize on the potential. To keep volumes up and safeguard profits, companies must increase energy efficiency, reduce labour costs and cut down on waste, while exploring the potential for customer-focused innovation in collaboration with buyers in the market, such as new product mixes and smaller packages. Smaller companies must explore greater integration throughout the supply chain and all possibilities to meet the demands of buyers in an efficient and cost effective way; including through private labelling and other forms of partnerships.

Meat

A 2011 European Union *Study on the Competitiveness of the European Meat Processing Industry* estimates that the agriculture industry contributed EUR 85.7 billion to the European economy in 2009, with the meat sector accounting for about 25 percent of this total. The pork industry is the most significant meat producing industry, followed by poultry. EU total meat production is expected to continue its recovery over the outlook period (2011-2020) from the decline suffered in 2008 and 2009, and is expected to show a further moderate increase of 2.4% by 2020. The outlook differs between ruminants and non-ruminants, as beef/veal and sheep/goat meat production is estimated to drop by 1.3% and 7.9% respectively between 2011 and 2020, while pig and poultry meat production would expand by 3.6% each.[4] Competition from third country imports and trade negotiations are expected to increasingly impact EU producers by encouraging increasing competition. In particular, the EU meat industry faces competition from third countries like Brazil and Argentina that benefit from a comparative advantage in inputs such as land, feed, and labour. Increasing costs of inputs including feed, higher energy prices, costs of refrigeration are affect all levels of the value chain for European producers.

The BSE- meat crisis some years ago provided a major turning point in food policy and concern for consumer's welfare. The crisis fuelled the development of legislation incorporating consumer concerns, food safety and traceability, which is binding on potential exporters to the EU. Supply chain optimization has mandated food channels to enhance traceability, quality control and reliability, resulting in

[4] *Prospects for Agricultural Markets and Income in the EU 2011–2020,* http://ec.europa.eu/agriculture/publi/caprep/prospects2011/index_en.htm

increasing concentration, that is, fewer and larger suppliers within the food supply chain. As a result, EU meat producers have developed preference for long-term business relationships. In general, retailers are perceived to have the greatest bargaining power however power balances vary according to specific products, market structures and the positioning of various actors in the value chain. By way of example, research has found that the market share for private labels in frozen and prepared meat is much lower (19.7 percent) than for producers, who dominate 31.2 percent of market share. Increasing consolidation of actors along the value chain has meant that there are fewer outlets with which to negotiate and this increased bargaining power of buyers has been matched by new corporate strategies. As a consequence, suppliers are forced to adopt systems and processes that would comply with retailer requirements and in turn require significant investment, which can lock producers into the relationship. Changing retailers means switching systems, which becomes a more expensive proposition, and becomes less likely.

Market Segmentation

Fruit

The market for fresh fruit can be divided into three sub-sectors: **off-season fruit**, **tropical fruit** and **exotic fruit**. Where fruit species are produced in the EU as well as externally (such as oranges), market interests refer to “offseason fruit”. During the EU production season, internal supply of off-season fruit (OSF) is high and import prices and quantities are therefore lower. Outside the EU harvesting season (roughly between May and October for most species), the EU imports more off-season fruit from countries in the Southern hemisphere to ensure year-round supply. Of significance to marketing planning, the off-season fruit species are the species EU consumers are often most acquainted with. Therefore, the European markets are mostly saturated for these products and competition is fierce. Nonetheless, the EU market is the largest market for OSF in the world. It will remain a net importer of OSF. Given this fact and the fact that off-season fruit is traded in large volumes, it is an interesting market for developing country exporters. Tropical fruit are an important niche for developing country producers because the EU generally does not produce these fruits and therefore relies on imports from tropical countries to satisfy demand. Because exotic fruits are relatively unknown, they have small market shares whereas many other fruits are already consumed in large volumes. This can have a direct influence on market entry strategy and country selection. The EU also relies on external supplies of exotic fruit, generally from tropical countries within the Southern hemisphere. Although some exotic fruits are already well known on the EU market, competition between fruits is fierce.

Vegetables

The EU market for fresh vegetables can be divided into three segments based on geographic location and associated consumer profiles. Even though these may change over time as a result of changes in the drivers for demand, they are relatively fixed, as follows.

- The Northern and Western member states are the most wealthy and large consumers of vegetables. The region provides a growing market for convenience, on-the-go, added value and certified organic and fair trade vegetables. Vegetables are increasingly bought at large

supermarket chains. Quality demands are high (almost exclusively Class I2) and the market is largely consolidated. Interesting markets are The Netherlands, Germany, UK and France.

- The Southern member states are the largest consumers of vegetables with a preference for local vegetables. Local production has difficulties competing with imports from developing countries, hence imports are increasing. Freshness and taste are reasons for purchase. Organic vegetables have a high market potential. Vegetables are bought from supermarkets and vegetable mongers. Attractive markets are Spain and Italy.
- In the Eastern member states of the EU, demand and prices are lower than in the other EU regions. Quality, health and safety demands generally do not exceed EU legal standards. Class II products for consumption can be sold in these states. The market share of supermarkets is not as high as in many other member states. Sustainability issues are still of little relevance. On the other hand, this region is developing fast. The most interesting markets are Poland, Romania, the Czech Republic and the Baltic states (Estonia, Latvia and Lithuania).

Meat

The EU market for fresh meat may be further segmented into the markets for;

- Beef and veal
- Sheep meat and goat meat
- Pig meat/ pork
- Poultry meat.

HIGH POTENTIAL PRODUCT SEGMENTS IN THE EU

Fruit

- ***Off-season fruit:*** melons, grapes, citrus fruit (fresh or dried)
- ***Tropical fruit:*** fresh bananas, guavas, mangos, mangosteens, fresh or dried pineapples
- ***Exotic fruit:*** fresh papaya; fresh or dried limes and citrus; dried dates, figs; fresh tamarinds, cashew apples, lychees, jackfruit, sapodilla plums, passion fruit, carambola and pitahaya; fresh or dried avocado

Vegetables

- ready-to-use vegetables convenience and processed vegetables
- out-of-home market (hotel, restaurants and cafeteria)
- sustainable and organic vegetables
- smaller and tastier varieties of vegetables

Meat

- specialty meat production
- fresh meats with specific components of taste and variety with appropriate branding (e.g. Barbados Black belly sheep).

CONCLUSION: CRITICAL SUCCESS FACTORS IN DEVELOPING EXPORT INDUSTRIES IN FRESH FOOD

In developing export industries in fresh food, there are several basic requirements to enable producers to enter the value chain. Basic optimal conditions include:

- climatic conditions which favour year round supply
- adequate transportation infrastructure: roads, ports and airports
- refrigerated cargo facilities to enable maintenance of the cold chain in transport
- sanitary and phytosanitary regulatory systems
- willingness to align local Good Agricultural Practices (GAP) with the requirements of Global Gap standards
- trade policies which favour suppliers entering the market on competitive terms
- understanding market needs and requirements in the context of the buyer-driven supply chain; maintenance of open lines of communication regarding demand preferences in products, quality and packaging requirements and fostering buyer involvement at all stages of the chain
- particularly in the case of processing, willingness to meet hygiene requirements, manage food safety and develop on site laboratories for testing of product and staff and support Hazard Analysis and Critical Control Pont (HAACP) analysis
- understanding of the role of investments in new technologies and good quality packaging materials in preserving quality and increasing shelf life and the ability to source these good quality packaging materials economically
- understanding the role of workforce training and development to meet the needs of a more highly developed and competitive value chain
- recognition of the role of economies of scale and by extension, collaboration among small producers in convincing the market of the ability to deliver consistent quality supply on a timely basis.

SITUATIONAL ANALYSIS: THE FRESH FOODS SECTOR IN BARBADOS

In 2012, the Ministry of Agriculture in Barbados initiated a series of consultations around the publication of a White Paper on Agriculture, from which emerged a background document. The background document summary which is available online provides a useful indication of the characteristics of the agricultural sector in Barbados at the time of writing and the main the issues affecting its growth and development. The main issues articulated are summarized below.

- ***Challenges emanating from the global environment and concerns for food security***: changes in the global environment have significantly challenged the ability of governments to assure their populations of adequate supplies of safe and nutritious food. Major occurrences since 2007/2008 include:
  i. a food crisis, which was a shock to the global food system and resulted in food riots in over twenty countries as a result of the reduced availability of, as well as reduced access to food;
  ii. a financial and economic crisis that contributed to reduced levels of disposable income and the decreased consumption of food, especially among the poor. This increased their vulnerability to malnutrition and other health issues, given the fact that a large share of their household resources is allocated to food purchases.
  iii. an energy crisis, which led to increases in freight costs, as well as the cost of producing agricultural commodities, leading to the increased cost of food

  These occurrences have lead the Barbadian government to identify strategies to assist in gaining food and nutrition security. Barbados has not escaped the effects of these phenomena, which have also resulted in a significant reduction in disposable income for many local consumers. During 2011, countries around the world were again faced with a situation of soaring food prices. By mid-2011 food prices had reached levels that were even higher than those reached during the food crisis of 2008. The forecast is that these latest increases in food prices will not be a temporary phenomenon, being as the result of structural changes based on increases in the price of oil, increased transportation cost, climate change and the use of agricultural products for biofuel production. It is expected that World demand for the food will continue to increase as population growth and urbanization continues, especially in India and China. It is therefore not anticipated that food prices will return to levels experienced before the food crisis of 2007/2008, but that in fact, there will be greatly increased volatility being experienced over time.
- ***Expanding food import bill:*** Barbados' food import bill was estimated at US $265.2 million in 2008. More recently, statistics obtained from the Agricultural Planning Unit indicate that the food import bill was US $326.89 million in 2011. A renewed emphasis on securing a greater level of self-sufficiency in food production could assist in reducing the growing food import bill, which can also assist in improving the balance of payments position of the country.
- ***Challenges to development of the agricultural sector:*** Over the years, however, the agriculture sector in Barbados has become increasingly marginalized. This sector has furthermore suffered for many years as the result of under investment into critical areas such as research, extension, technological advances, which has acted as a key constraint to the development of the sector. In addition, the sector has been faced with numerous other challenges that include:
  i. Limited financing and inadequate levels of new investment

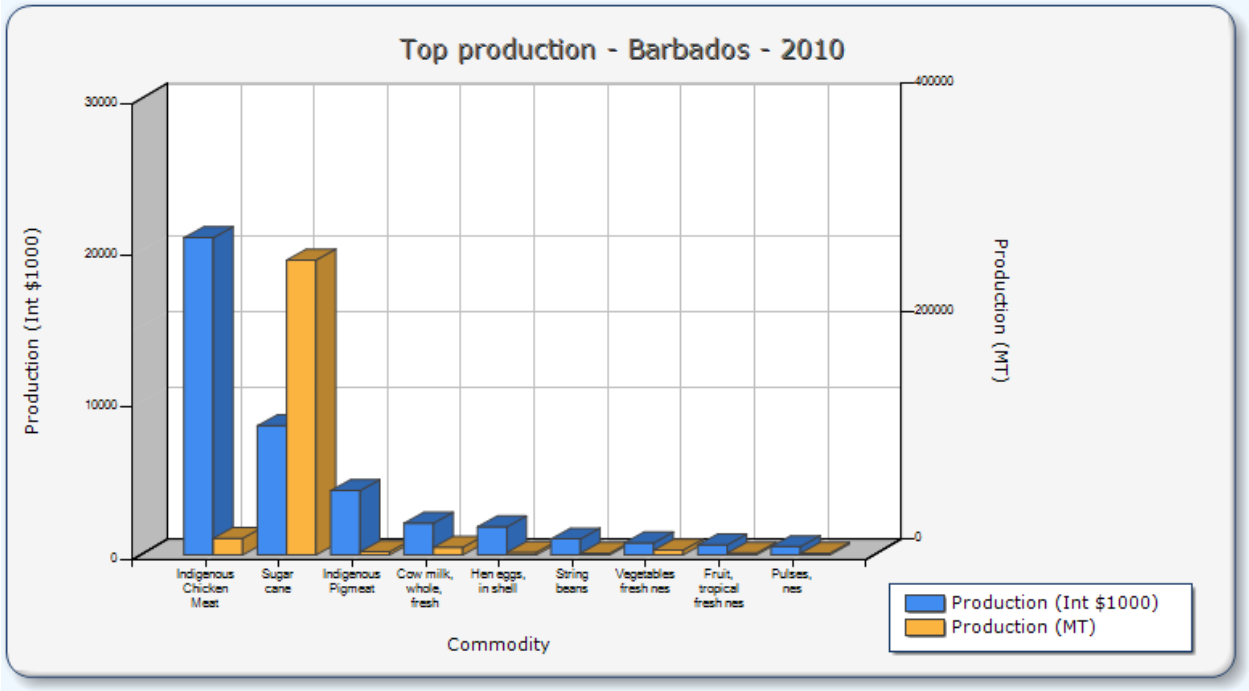
ii. Inadequate research and development
iii. Reduced quantities of land available for agricultural production
iv. An inadequate legislative framework for dealing with key issues such as food imports, praedial larceny and the transfer of land out of agriculture
v. The high cost of energy
vi. The insurgence of transboundary diseases and invasive species, such as the giant African snails, etc.
vii. Limited access to affordable water
viii. The issue of climate change is also having, and will continue to have, an impact on agricultural production.

Table 2 below shows the estimated production data of the 20 most important food and agricultural commodities (ranked by value) in Barbados for 2010. The data was culled from the FAOStat Database. When applicable, international commodity prices are used, to calculate the total value of each commodity produced by each country and subsequently used in the ranking of commodities and countries, not included in this report. This methodology avoids the use of exchange rates for obtaining aggregate information and also improves and facilitates international comparative analysis of productivity at the national level.

Table 2: Estimated Commodity Production in Barbados 2010, ranked by value relative to international commodity prices

Rank	Commodity	Production Value (int-US $1000)	Flag	Production (MT)	Flag	KEY	
1	Indigenous Chicken Meat	20879	*	14658	Fc	* :	Unofficial figure
2	Sugar cane	8498	*	258800		[ ]:	Official data
3	Indigenous Pigmeat	4235	*	2755	Fc	F :	FAO estimate
4	Cow milk, whole, fresh	2091	*	6701		Fc:	Calculated data
5	Hen eggs, in shell	1850	*	2231			
6	String beans	1049	*	1100	F		
7	Vegetables fresh nes	792	*	4200	F		
8	Fruit, tropical fresh nes	654	*	1600	F		
9	Pulses, nes	544	*	1000	F		
10	Indigenous Cattle Meat	446	*	165	Fc		
11	Avocados	437	*	630	F		
12	Indigenous Turkey Meat	355	*	272	Fc		
13	Fruit Fresh Nes	349	*	1000	F		
14	Maize, green	281	*	680	F		
15	Tomatoes	265	*	718			
16	Bananas	242	*	860	F		
17	Indigenous Sheep Meat	232	*	85	Fc		
18	Cucumbers and gherkins	228	*	1148			
19	Yams	206	*	807			
20	Okra	194	*	303			
Source: FAOStat, http://faostat.fao.org/site/339/default.aspx							

Figure 2: Graphical Illustration of Estimated Commodity Production in Barbados, 2010 (Source: FAOStat)



Barbados Exports of Fresh Foods

Table 3 below shows a list of selected fresh foods exported by Barbados and Table 4 shows the main destinations for these products from Barbados, obtained from the relevant ITC TradeMap. The data shows a 2011 contraction in exports of meat from an earlier high in 2008. Fruit exports rose significantly in 2011 and remained consistent between 2009 and 2010. Exports of edible vegetables and roots and tubers declined significantly in 2011.

TABLE 3: SELECTED FRESH PRODUCTS EXPORTED BY BARBADOS						
		EXPORTED VALUE (US$000's)				
Code	**Product label**	**2007**	**2008**	**2009**	**2010**	**2011**
'02	Meat and edible meat offal	649	890	738	622	409
'08	Edible fruit, nuts, peel of citrus fruit, melons	193	332	226	226	363
'07	Edible vegetables and certain roots and tubers	165	125	61	78	50
Sources : ITC TradeMap calculations based on UN COMTRADE statistics.						

TABLE 4: LIST OF SELECTED PRODUCTS EXPORTED BY BARBADOS		
HS Code	**Product label**	**Country**
'02	Meat and edible meat offal	CARICOM, UK, Netherlands Antilles, US
'08	Edible fruit, nuts, peel of citrus fruit, melons	CARICOM, Canada, US, UK
'07	Edible vegetables and certain roots and tubers	CARICOM, US
Sources : ITC calculations based on UN COMTRADE statistics.		

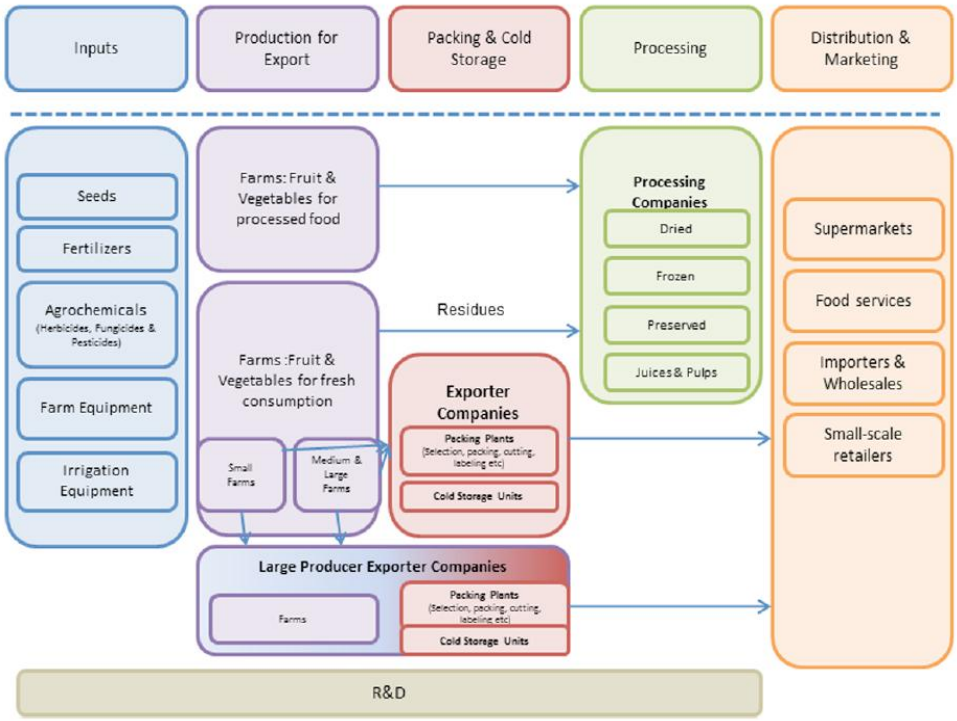
Strengths, Weaknesses, Opportunities, Threats (SWOT) Analysis

Table 5 below highlights the key points of a SWOT analysis of the Barbadian fresh food sector, undertaken through workshop consultations with some companies in the sector.

TABLE 5: SWOT ANALYSIS: BARBADIAN FRESH FOOD SECTOR		
INTERNAL TO THE SECTOR	**STRENGTHS**	**WEAKNESSES**
	• experience of export • Independent local laboratory (BNSI) in expansion mode • Institutional support available on island: Ministry of Agriculture, Barbados Investment and Development Corporation, Barbados Agricultural Society, Barbados Private Sector Association	• testing systems for compliance with specific EU technical regulations and SPS measures for food- current testing done mainly to US FDA standards • integration with EU market supply chains and EU based distribution arrangements • inconsistent levels of production • absence of reclaimable, innovative and technologically superior packaging • limited product varieties and inconsistent availability • effective branding and consistent and sustainable international marketing and promotion • sensitization as to the needs and flavours and tastes of EU consumers • low levels of innovation and lack of ongoing research and development • Reduced quantities of land available for agricultural production, limited access to affordable water and relatively high costs of energy • Low levels of collaboration
EXTERNAL	**OPPORTUNITIES**	**THREATS**
	• Health and wellness products • Convenience foods • Novel and traditional Barbadian foods • Research and technology partnerships • Receptivity towards Caribbean cuisine while market is interested in new product lines • Organic food markets • Fair trade markets • Global migration and Diaspora markets • Pre-packaged and frozen foods	• Limited financing and inadequate levels of new investment • Significant levels of competition from food imports • Climate change and natural disasters • Pests and disease • Inefficient functioning of the CARICOM Single Market and Economy (CSME) • Requirements for increasing levels of environmental and ethical standards at increasing cost • Non-compliance with increasing regulatory environment for food safety • Downward pressure on prices created by the conditions in the global economic market • Undercapitalization of micro-firms (BIDC, 2010)

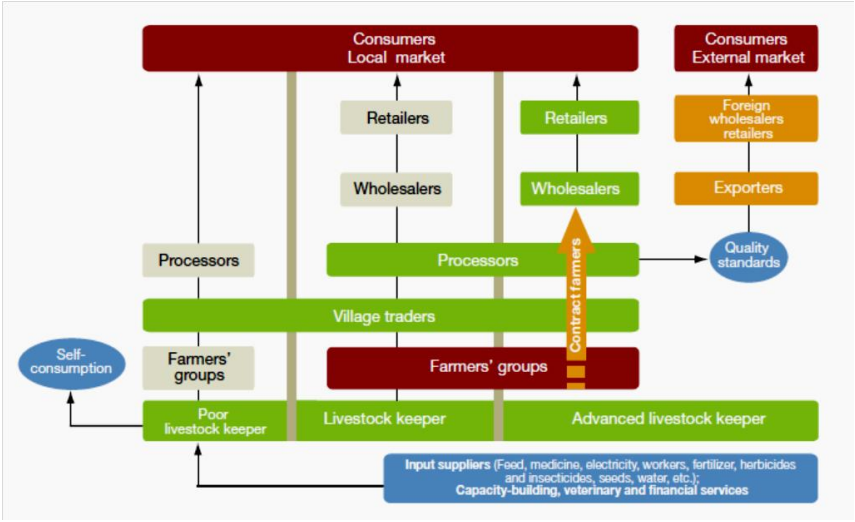
Figure 3 below shows the global value chain for fruits and vegetables, while Figure 4 shoes a global value chain for livestock production.

Figure 3 (Below): The Fruit and Vegetables Global Value Chain



Source: Duke CGGC (2011),p.12

Figure 4 (below): A Global Value chain for livestock production



Source: IFAD (2010)

Inputs

Inputs are elements needed for production, such as seeds, fertilizers, agrochemicals (herbicides, fungicides and pesticides), farm equipment and irrigation equipment. EU Food Law legislation requires traceability throughout the value chain to ensure compliance with hygiene requirements and sanitary and phytosanitary regulations.

- EU Food Safety: http://europa.eu/legislation_summaries/food_safety/index_en.htm
- EU Food Hygiene rules: http://europa.eu/legislation_summaries/food_safety/veterinary_checks_and_food_hygiene/index_en.htm
- Plant Health Checks, pesticide residues: http://europa.eu/legislation_summaries/food_safety/veterinary_checks_and_food_hygiene/index_en.htm

Export Production

Export production for the EU market, which includes all processes related to the growth and harvesting of the produce, such as planting, weeding, spraying and picking and/or rearing of the animals. Ideally, these processes and their management will be conducted in accordance with the requirements of a particular standard (EUREGAP, Fair Trade, ISO9000, ISO14000, ISO22000, etc.), in conformance with the particular marketing standards which may apply to individual products and under the direction and guidance of a buyer within the marketplace.

- EU markets for fresh produce: http://www.cbi.eu/marketintel/EU-legislation-Marketing-standards-for-fresh-fruit-and-vegetables/160786
- EU legislation: Marketing standards for fresh fruit and vegetables: http://www.cbi.eu/marketintel/EU-legislation-Marketing-standards-for-fresh-fruit-and-vegetables/160786
- CBI's Buyer's Black Box: Fresh Fruit & Vegetables http://www.cbi.eu/marketintel_platform/Fresh-Fruit-Vegetables/136122/blackbox
- Production standards: ITC Standards Map, http://search.standardsmap.org

Packaging and Cold Storage

Grading, washing, trimming, chopping, mixing, butchering, packing and labelling processes may be included at this stage. Once ready for transport, food is blast chilled and placed in cold storage units ready for export. Fresh and chilled products require a continuous cold chain for transport to ensure food safety. It is imperative that all packaging is sourced from suppliers compliant with Good Manufacturing Practice (GMP) and EU technical regulations, as well as any standards imposed by buyers or retailers. The packaging which is sourced must adhere to all harmonized packaging and labelling regulations. Additional national regulations may also apply and these should be identified through dialogue with buyer. EU Regulations that apply include:

- Product labelling and packaging
  http://europa.eu/legislation_summaries/consumers/product_labelling_and_packaging/index_en.htm
- Labelling, presentation and advertising of foodstuffs
  http://europa.eu/legislation_summaries/consumers/product_labelling_and_packaging/l21090_en.htm
- Production and labelling of organic products
  http://europa.eu/legislation_summaries/consumers/product_labelling_and_packaging/f86000_en.htm

Secondary Processing

Drying, freezing and preservation may be secondary processes used to extend shelf life or add value to the raw, primary product. At the beginning of the 2000s, the European Union introduced an initiative called 'From the Farm to the Fork' based on risk analysis and traceability, with the aim of guaranteeing food safety. In line with this approach, foodstuffs are monitored at all susceptible stages of the production chain, in order to make sure that strict hygiene rules are adhered to. It is critical that processing plants are willing to meet hygiene requirements, manage food safety and develop on site or external laboratories for testing of product and compliance with EU sanitary and phytosanitary regulatory systems.

- EU Food Safety: http://europa.eu/legislation_summaries/food_safety/index_en.htm
- EU Food Hygiene rules:
  http://europa.eu/legislation_summaries/food_safety/veterinary_checks_and_food_hygiene/index_en.htm

HACCP Implementation:

- EU HACCP Guidance Document:
  http://ec.europa.eu/food/food/biosafety/hygienelegislation/guidance_doc_haccp_en.pdf
- Food Safety Jamaica Initiative: http://www.fsjamaica.org/en/haccp_/
- SGS HACCP Certification: http://www.sgs.com/en/Agriculture-Food/Food/Transportation/GFSI-Certification/HACCP-Certification.aspx

Assessing Export Readiness

Market promotion should only be undertaken when the exporter has assessed export readiness and the potential viability of export to a specific target country within a specific market segment (i.e. wholesale, retail, food service and catering, e-commerce, etc.). The following resources may be useful for exporters in assessing their export readiness.

- CBI Export Marketing Planner (2009): http://www.cbi.eu/marketintel/Export-Marketing-Planner-A-manual-on-how-to-enter-European-markets/158976
- SIPPO Export Manual, Exporting to Europe: An Introduction:
  http://www.slideshare.net/olgan/exporting-to-europe-an-introduction-sippo-cbi

Targeting Buyers through Promotion

Trade Fairs are the most common methods of targeting buyers. They are also good events for networking and building contact with suppliers of inputs, packaging and machinery as well as service providers. Some prominent trade fairs in the EU are listed below.

- ***The Anuga Fair*** in Germany (http://www.anuga.com), to be held next in October 2013, is not only the largest food and beverage fair in the world, it is also the sector´s most important fair for new markets and target groups. The fair features a special show for chilled and fresh foods. Organizers state that it is the perfect venue for all the latest trends and themes and a great place to make first-rate contacts and business deals. Anuga 2011 was attended by 6,596 companies from 100 countries, which occupied a gross exhibition space of 284,000 m². Over 155,000 trade visitors from 180 countries attended.
- ***The Horti Fair*** held in Amsterdam (http://www.hortifair.com) is the horticultural trade show with the most innovations in the fields of plant breeding, greenhouse technique and cultivation technique. Horti Fair Fresh is the trade show for the Fruit and Vegetable sector. Both fairs, held at the end of October into early November attract around 30,000 visitors. The Horti Fair is the biggest international trade fair for Technology, Innovation and Inspiration in Horticulture and attracts almost 500 exhibitors from 32 countries to the trade event, seminars, network gatherings and high profile events. It is a major event targeted at the professional international producer of fresh vegetables, flowers and plants. Trade visitors can attend the event free based on prior registration.
- ***Fruit Logistica***, held in Berlin (http://www.fruitlogistica.de/en/) is the world's leading trade fair for the fresh fruit and vegetable business. The 2012 show was attended by about 56,000 visitors from 139 countries. Scheduled for the 6th to 8th February 2013, more than 2,400 companies from across the entire fresh produce value chain are expected to be present in a single location; including global players as well as small and medium-sized suppliers from all around the world. The three day event offers an excellent platform for networking, seeking partnerships and obtaining an overview of the latest trends in the fresh produce business. Fruit Logistica also offers an extensive accompanying programme of seminars, workshops and events. FRESHCONEX, an international trade fair for Fresh Produce Convenience, was held alongside Fruit Logistica until 2012, and will be fully integrated into the show as of February 2013.

Logistics and Distribution

It is important that exporters understand the framework for distribution and the attendant costs which will apply to transportation through roads, ports and airports. For chilled and fresh drinks, refrigerated cargo facilities are critical to enable continuous maintenance of the cold chain in transport. Laparkan Shippers in Barbados, during an interview in October 2012, advised that from Barbados, shipments are occasionally sent to the EU by air or freight. Air cargo is done via British Airways and Virgin Airlines. As such, there are no direct air routes to the continent and cargo must pass through the UK before being transferred on to the EU. Ocean freight is less expensive than air freight and is the preferred medium for movement of less than a container load of products, since it offers the possibilities of consolidation with other producers which is a more economical option. Transfer to the EU is also done through the UK where Laparkan maintains an agent who makes contact with EU freight forwarders to arrange cargo

transfer to the EU. The company is also connected with a range of agents in the EU through its membership in the World Customs Agents (WCA) Association. Shipments are demand based and in general vessels leave every two weeks, however with full container loads, these can be shipped weekly. If groups or clusters are interested in accessing cold chain transportation, dialogue on collaboration could be pursued with Goddard's catering which maintains a cold storage facility at the airport or BICO which maintains cold storage close to the port. Air freight rates are based on weight or dimensions of a particular package (whichever is more). In general, rates for ocean shipping can be estimated as follows:

- ***Barrels (Barbados to Portsmouth, UK):*** range between BDS$650.00 (consolidated) to upwards of BDS$1000.00 (consolidated)
- ***Containers (Barbados to Portsmouth, UK):*** upwards of US$1800.00 (approximately).

On the EU side, intra-EU transportation is mostly handled by truck or rail through freight forwarders. Air transportation is more expensive and given the extensive rail and road network, this is much less frequently used. There is an association of freight forwarders in every country and very often, there may be relationships between distributors in the market and particular forwarders. Handling charges are approximately 0.6% of the shipment value for the first 30 days and 0.15% of the value for an additional 30 day period.

EXPORT DEVELOPMENT STRATEGY AND ACTION PLAN

Objectives of the Strategic Export Development Initiative to the EU

The general objective of the strategic export development initiative is to assist producers in tapping into potential market opportunities arising from the EPA. The specific objectives are:

- To increase the market penetration of Barbadian fresh foods within the middle to high end segments of the EU market, and
- To establish a functioning working committee of producers and organizations across the value chain to contribute to long term advocacy and lobby initiatives in entering the EU market and hence the development of EPA monitoring mechanisms.

Rationale

The EU market offers significant opportunities based on the number of consumers and current population trends such as increasing multiculturalism and interest in health and wellness and novel food items. Despite this, the recessionary economic conditions have created increasing competition and rivalry in the market which has triggered downward pressures on prices and an ongoing hunt for value on the part of the EU consumer. The levels of regulation concerning food safety and potential hazards are very high and European Food Law places significant legal responsibilities on both the manufacturer and the importer to ensure compliance. Fresh foods are particularly sensitive given the importance of sanitary and phytosanitary measures. Within this context and with so many products globally seeking entry to this potentially lucrative market, Barbadian firms are unlikely to gain the audience of buyers unless they can demonstrate systems to ensure compliance with both sanitary and phytosanitary (sps) measures and technical regulations. There are also the technical, functional and aesthetics aspects of packaging and labelling to be considered and many locally produced products will not meet the market expectations in this regard. There is evidence that in general, new product development and innovation is inconsistent, unstructured and unfocused within firms and this means that where firms are successful in entering the market, there is very limited chance of their long term survival and success. Collaboration among firms is weak and levels of trust are low. This will be a major challenge, since firms seeking to penetrate the EU market with products can expect to face well organized, established and effective lobby from the multiple sector-specific associations in the EU and there will be a future need to replicate sector-specific advocacy on the local level. With the comparatively small size of the private sector in Barbados, it is unlikely that multiple associations will be sustained, hence the proposed approach of establishing a sector-specific, private sector led working committee is considered more feasible.

Methodology and Approach to implementation

The key aspect of the proposed initiative which differs from many similar export development initiatives is the underlying objective to establish a small private sector led working committee of producers under the Barbados Small Business Association, the Barbados Manufacturers Association or the Barbados Private Sector Association to oversee the project development and implementation. Experience all over the world has shown that where small firms engage in focused collaboration this leads to shared learning and catalyzes innovation. The focused collaboration in this case is an export development initiative to develop cluster members. It is important that clustering encompass all stages in the value

chain, for example to include suppliers of inputs (particularly packaging) as well as producers, packaging logistics and transportation providers and representatives of all agencies involved from concept to consumer promotion. During the research consultations, a representative of Laparkan shippers has already expressed interest in working with producers on such a Committee over the long term to derive mutually beneficial commercial expansion. The absence of value chain engagement is a significant failing of many cluster initiatives in the Caribbean. It is widely accepted that inter-firm cooperation can allow firms to retain their autonomy while:

- Developing markets faster at reduced cost and risk, in particular, export markets
- Undertaking joint activities such as market research and product development beyond individual firm capabilities or resources
- Exploring new business opportunities abroad and promote integration into global markets
- Improving profitability by sharing administrative and promotional costs
- Achieving efficiency gains by shared access to technology
- Accumulating knowledge and information
- Saving time and cost using joint transportation and other export facilities
- Moving from 'reactive' to 'active' exporting.

Scope of Activities to be Undertaken

The proposed scope of activities to be undertaken represents another outcome of the consultation discussions. The strategic activities identified reflect immediate priorities to be addressed on the local level, which also offer capacity building possibilities for BPSA as an organization.

1. ***Strategic Activity 1: Identify a group of fresh food producers interested in the EU market and establish of a working committee dedicated to increasing exports to the EU***

   The need for focused collaboration among producers in tackling the EU market cannot be understated. Beyond the basic viability concerns such as transportation and shipping, the environment for legislative changes in the EU is extremely dynamic and ongoing advocacy and lobby is required. The working committee should include business interests at all level of the value chain; from the supply of inputs to agents operating in the EU market, as contact is established through the selected trade channels. Representatives of the WTO contact points for sanitary and phytosanitary (SPS) measures and technical barriers to trade (TBTs) should also be engaged. The working committee should be tasked with overseeing the implementation of a market penetration project to increase exports to the EU. This project should be housed in a local private sector association. Project tasks should include:

   - Identification of priority fresh food products for export
   - Determination of available production capacity for sale to the market
   - Identification of priority markets by country, marketing channels (wholesale, retail and/or foodservice) and logistic considerations to be tackled
   - Addressing productivity issues and deficiencies in production in collaboration with the relevant institutional support in Barbados
   - Engagement of new buyers on behalf of the producers group through attendance at trade events

2. ***Strategic Activity 2: Cluster attendance at a major EU food fair which can facilitate building of market awareness and also sourcing of inputs as well as machinery to generate compliance with EU standards and technical regulations***

Attendance at a major trade fair will support cluster members in understanding market standards, observing distribution channel requirements and gaining knowledge to inform sourcing of inputs to comply with EU market standards and technical regulations. Cluster members should attend first as visitors and attend market orientation seminars before staging an exhibition of the group in future years, aimed at identifying and engaging new trade buyers and targeting external investment to impove productivity and integration with the EU supply chain.

3. ***Strategic Activity 3: Programme to support implementation of certification to international standards in small firms***

Certification to international standards such as HAACP, GLOBEGAP, Fair Trade and the ISO series, do not only provide the assurances of quality and traceability which are standard requirements for market entry. These standards provide a tried and tested template or roadmap for small firms in getting the desired results required for reaching the market. Although certification is initially costly, the long term benefits from signaling to the market that business intends to be sustainable and operate at high levels of governance and accountability cannot be underestimated in the current environment of uncertainty. The committee should identify which certification programmes are most accessible and valuable based on an initial visit to an EU based trade event such as Anuga, Horti Fair and/or Fruit Logistica. A consultant will then be required to begin diagnostic audits and some firm level support to implementation may also be required. There may be opportunities to partner with the BNSI, Government Laboratory, the BIDC or a relevant Ministry on this activity and these possibilities should be explored by the working Committee.

4. ***Strategic Activity 3: Pilot new product development initiative among cluster firms***

A pilot product development initiative encompassing the development of product varieties which meet the prevailing EU product standards, taste profile of target EU consumers, nutrition labelling and intellectual property branding should then be developed in collaboration with the firms to bring these product lines to the standard which would ensure market acceptance.

5. ***Strategic Activity 4: Technical Assistance (packaging selection and labelling development)***

Expertise should be engaged to support cluster firms in the selection of their packaging and development of labelling, consistent with the technical regulations outlined in the research reports as well as the individual EU product standards and in consultation with an in-market consultant. The bilingual nature of EU commerce needs to be considered as well as technical requirements such as nutritional labelling.

6. ***Strategic Activity 6: In-market promotion***

The pilot initiative should be brought to market through an in-market promotion activity at an EU based trade event. These activities are best undertaken with the guidance of in-market experts, who can navigate the technical regulations, but also the wider legal and social environment of doing business in the EU.

Action Plan and Timeframe

It is suggested that an 18 month year pilot programme be developed to support the market penetration initiative. Table 6 below shows possible sequencing of the indicative work plan.

TABLE 6: INDICATIVE WORK PROGRAMME							
	ACTIVITY	Q1	Q2	Q3	Q4	Q5	Q6
1	Establishment of a working committee and project coordinator						
2	Cluster attendance at a major EU trade event for market orientation						
3	Programme to support implementation of international certification in small firms						
4	Pilot new product development initiative among cluster firms						
5	Technical Assistance (packaging selection and labelling development)						
6	In market promotion						

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