



THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY
USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT
POLICY

Voluntary Public

Date: 6/3/2014

GAIN Report Number: CB1406

Caribbean Basin

Post: Miami ATO

Caribbean Environment for U.S. Agricultural Exports

Report Categories:

Agricultural Situation

Agriculture in the Economy

Market Development Reports

Market Promotion/Competition

Promotion Opportunities

Exporter Guide

Approved By:

Katherine Nishiura

Prepared By:

Omar Gonzalez

Report Highlights:

Although the Caribbean has been slow to recover from the global economic crisis of 2008/2009, U.S. exports of agricultural and related products to the Caribbean have increased for the fourth consecutive year, culminating in a record-setting \$1.49 billion in 2013. Prospects for stronger economic growth in the region in 2014 could lead to even greater export opportunities for U.S. suppliers. This report looks at the political, economic, agricultural policy, trade and SPS regulatory context which U.S. agricultural exporters will encounter in the Caribbean as they seek to capitalize on these opportunities.

General Information:

General Political Situation and Trends:

The Caribbean is one of the most fragmented and diverse regions in the world. This vast geographic area is covered by two regional FAS offices, the Office of Agricultural Affairs (OAA) in Santo Domingo and the Caribbean Basin Agricultural Trade Office (CBATO) in Miami. The OAA in Santo Domingo covers the Dominican Republic, Jamaica and Haiti. The CBATO covers practically all other island markets. Specifically, CBATO islands of coverage include: Anguilla, Antigua and Barbuda, Aruba, The Bahamas, Barbados, Bermuda, British Virgin Islands, Caribbean Netherlands or BES Islands (Bonaire, Sint Eustatius and Saba), Cayman Islands, Curaçao, Dominica, Grenada, Guadeloupe, Martinique, Montserrat, Saint Barthélemy, Saint Kitts and Nevis, Saint Lucia, Saint Martin, Saint Vincent and the Grenadines, Sint Maarten, Trinidad and Tobago, and Turks and Caicos Islands.

* * * * *

Politically speaking, the CBATO region of coverage is a mix of independent states, overseas departments or dependencies of European countries, and islands that are part of a European kingdom. Practically all of the islands have some sort of democratic parliamentary system or internal self-government and as a whole the Caribbean region is considered politically stable.

Countries in the region have generally good relations, including close commercial and social ties, with the United States. In islands where there is a high dependence on U.S. tourism as the principal source of income (e.g., The Bahamas, Bermuda, Cayman Islands, Aruba, and Turks and Caicos) this is more evident than in those that retain close ties with Europe, particularly in the French Antilles, Turks and Caicos Islands and the Dutch Caribbean. Canada has close relations with its many Commonwealth partners in the region. Cuba, the largest and most populated country in the region, maintains diplomatic relations with most of its Caribbean neighbors and reportedly plays an important role in terms of offering graduate and post graduate education to students from the Caribbean. China also has a growing presence in the Caribbean. Many islands have welcomed aid from China, particularly in the form of large infrastructure projects (stadiums, hospitals, airports, performing art centers, etc.). In The Bahamas alone, a \$3.5 billion mega resort (the largest of its kind in the Western Hemisphere) which is scheduled to open in December 2014, is being built largely with Chinese labor and financing from the Export-Import Bank of China.

Within CBATO region there are several political and economic alliances. The most notable are:

- The Caribbean Community (CARICOM) is made up of 15 Member States and five associate members. It comprises most CBATO islands of coverage as well as Belize, Guyana, Haiti, Jamaica and Suriname. Upon obtaining their new semi-autonomous country status in 2011, Sint Maarten and Curacao expressed interest in joining CARICOM as Associate Members. In 2012 CARICOM set up a working group to study matters pertaining to associate membership, including that of Curaçao and Sint Maarten, but still no decision on the matter has been made. CARICOM's Single Market and Economy (CSME) provides for free intra-regional movement of goods and a 40 percent common external tariff (CET) for extra-regional goods, among other things.
- The Organization of Eastern Caribbean States (OECS) is a nine member grouping comprising Antigua and Barbuda, the Commonwealth of Dominica, Grenada, Montserrat, St Kitts and Nevis, St. Lucia and

St Vincent and the Grenadines. Anguilla and the British Virgin Islands are associate members of the OECS. In 2011, the OECS' Economic Union entered into force, creating a single financial and economic space among the six independent OECS countries. As a territory of the U.K., Montserrat is expected to ratify the Economic Union Treaty once its new constitution comes into force. Many elements of the OECS Economic Union were already in place under CARICOM's CSME. All OECS countries, with the exception of the British Virgin Islands, use a single currency, the Eastern Caribbean Dollar, the existence of which predates the creation of the Economic Union. The exchange rate with the U.S. Dollar is fixed (US\$1.00 = EC\$2.70). As a practical matter, trade in goods between OECS countries is very low.

- The Caribbean Forum of African, Caribbean, and Pacific States (CARIFORUM) is made up of 16 Caribbean countries, all former colonies of European countries. They are: the CARICOM countries (with the exception of Montserrat), Cuba and the Dominican Republic. Binding this grouping together in good measure is the 2008 European Union (EU)-CARIFORUM Economic Partnership Agreement (EPA) and the EU's pledge to provide substantial quantities¹ of "cooperation" to aid the CARIFORUM countries in their implementation of the EPA. (Cuba is the only CARIFORUM country which is not part of the EPA with the EU.) In 2011 a joint Caribbean-EU Strategy was developed, which aimed at laying the groundwork for a more mature relationship encompassing political dialogue and development cooperation over a five-year period that began in 2012. More recently, however, CARIFORUM countries have expressed significant concern at the implications of EU development policy decisions in 2012 that will emphasize targeted assistance for less developed countries and reductions in aid for middle income countries, such as the majority of the Caribbean countries. Nonetheless, while many Caribbean countries may be seeing their individual assistance from the EU diminish, the EU is reportedly increasing its Regional Indicative Programme from €165 million to €350 million euros.

- Venezuela's profile in the Caribbean Basin has risen over the past five years. Dominica, Antigua and Barbuda, Saint Vincent and the Grenadines, and more recently St. Lucia have joined the Venezuela-led Bolivarian Alliance for the Peoples of Our America (ALBA), which now comprises nine countries from Latin America and the Caribbean. In January 2014 Grenada and St. Kitts and Nevis also announced their intentions of joining ALBA. ALBA has provided considerable economic assistance to its Caribbean members in areas such as infrastructure, agriculture, and education (including scholarships for study in Cuba). Many Caribbean countries, including seven countries within the CBATO region (Antigua & Barbuda, The Bahamas, Dominica, Grenada, St. Kitts & Nevis, St. Lucia, and St. Vincent & the Grenadines) are also part of PetroCaribe, an arrangement with Venezuela that allows signatory countries to purchase oil from the South American country at preferential terms (up-front payment of 50 to 60 percent of the cost of the petroleum shipment and low interest 25-year terms to pay the balance).

See Appendix IV for a listing of CBATO island representation in selected international organizations.

Macroeconomic Situation and Trends:

Economic recovery in the English and Dutch-speaking Caribbean (which comprises most of the CBATO

¹ Reports vary, but they suggest hundreds of millions of Euros in various forms of aid ranging from balance of payments assistance to food safety projects.

islands of coverage) remained relatively weak in 2013, registering 1.3 percent growth in real GDP according to the UN's Economic Commission for Latin America and the Caribbean (ECLAC). The St. Vincent and the Grenadines economy was the top performer in the CBATO region with 2.1 percent growth, while Barbados and Dominica were at the lower end of the spectrum, with -0.7 and -0.5 growth, respectively. Trinidad and Tobago posted a 1.6 percent growth rate in 2013 owing mainly to necessary maintenance of its energy sector, which trimmed natural gas production, and reduced refining and output of petrochemicals.

The region's tourism sector, the driving force behind most of the island economies, remains subdued. Most travelers are holding a tight purse in light of continued uncertainty in their home economies and globally, according to the Caribbean Tourism Organization. Growth in the sector remains uneven, with some islands such as Aruba, Curacao, Sint Maarten and the Cayman Islands experiencing healthy gains while other markets such as The Bahamas, Barbados and Antigua and Barbuda are struggling to generate tourism revenues. According to the World Tourism Organization for the first eight months of 2013, international tourist arrivals to the Caribbean increased by only 0.1 percent.

Weak economic growth and high borrowing levels in recent years have led the region to become the most indebted in the world, according to the IMF. In fact, the average debt level in the Caribbean exceeded 76 percent of GDP in 2013, more than twice that of Latin American countries. Many islands, particularly those in the Eastern Caribbean, have seen their credit ratings downgraded and they are pursuing a combination of revenue-raising and expenditure-cutting measures in the face of continuing pressure from the IMF and credit rating agencies. In a dramatic example, in late 2013 Barbados announced it would lay off 3,000 public servants (10 percent of the government workforce) in early 2014. Although delayed briefly as the government negotiated with labor unions, the first cuts have begun to take place. It remains to be seen if the government will proceed fully with the reductions in its rolls, and what impact it will have on the Barbadian economy and demand for imports.

The outlook for 2014 is one of improved growth for the region, based on a 2.9 percent growth forecast for the global economy (ECLAC, 2013 Preliminary Overview of the Economies of Latin America and the Caribbean). Improving worldwide economic conditions, particularly in advanced economies which generate most tourist flows to the Caribbean, could have a positive ripple effect in the tourist-dependent islands of the Caribbean. Still, this growth prospect is not assured as the small island nations of the region remain highly exposed to external factors, according to ECLAC. Economic slowdowns in the United States or Europe could cut demand for Caribbean products and services (including tourism). The IMF indicates the high public debt situation is expected to remain worrisome and calls for difficult fiscal discipline. Moreover, media analyses openly speculate that countries that currently enjoy concessional financing and development assistance under PetroCaribe could face the disappearance of these benefits in the foreseeable future.

Agriculture in the Economy:

Agriculture is a challenging undertaking in most islands of the CBATO region. The total land area of the CBATO islands is 23,783 square kilometers (9,183 square miles), roughly the size of New Hampshire. Only about seven percent of this land is arable and an even smaller percentage is actually

utilized for farming. Other challenges include: scant water resources in some islands; no economies of scale; labor shortfalls due to poor returns or wages compared to the services sector; disease and pest issues; high energy costs: inadequate post-harvest handling and cold chain facilities; and hurricanes ripping through the region every year.

Due to these many constraints, agriculture's contribution to GDP ranges from 1 percent or less in Aruba, Bermuda, British Virgin Islands, Cayman Islands, Curaçao, Saint Martin, Sint Maarten, Trinidad and Tobago, and Turks and Caicos Islands to approximately 13.2 percent in Dominica. In most other islands, agriculture's contribution to GDP is between one and five percent. Commercial farming is concentrated in bananas and sugarcane. However, deterioration of preferential market access to the EU and diseases affecting banana production have negatively impacted production of these crops and export earnings in islands such as Dominica, Grenada, Saint Lucia, Saint Kitts & Nevis, and Saint Vincent and the Grenadines. Many of the islands produce tropical fruits, vegetables, root crops, coconuts, and spices. A few islands also produce dairy, poultry, pigs, goats, and sheep. See Appendix II for agricultural statistics by island.

Domestic Agricultural Policy Overview:

While most Caribbean governments devote some resources and efforts toward agriculture and rural development, budget and staff limitations generally prevent any large-scale or long-term focus on the sector. Many islands have modest extension programs. In the case of local produce, several islands have seasonal price supports, short-lived seasonal import bans on selected items, and/or quasi-government organizations which operate retail outlets aimed at helping farmers market their production and obtain "fair" prices. Governments are expressing greater interest in agriculture, however, driven since the late 2000s by food security concerns (see the Food Security section for more) and the desire to reduce food import bills.

Biosafety policy appears to be an emerging source of regulations, potentially affecting trade in some commodities. In October 2012, a United Nations Environment Programme/Global Environment Facility (UNEP/GEF) four-year, \$13 million Regional Project for Implementing National Biosafety Frameworks (NBFs) in the Caribbean formally got underway. The project is assisting 12 CARICOM countries (9 of which are in the CBATO's region of coverage) to comply with their obligations under the Cartagena Protocol on Biosafety (CPB). The project, which is being executed by the University of the West Indies, aims to:

- establish institutional (policy/legal) frameworks for biosafety at both the national and regional levels that will allow Parties to the CPB to utilize modern biotechnology in compliance with this Protocol;
- facilitate the establishment, enhancement and operation of institutional capacities as well as technical and technological resources among the participating Caribbean Member States for the detection, assessment and management of potential risks from modern biotechnology (in combination with invasive alien species (IAS) where appropriate) at the national and regional levels;
- develop and strengthen the human resource base and level of expertise in biosafety on a national

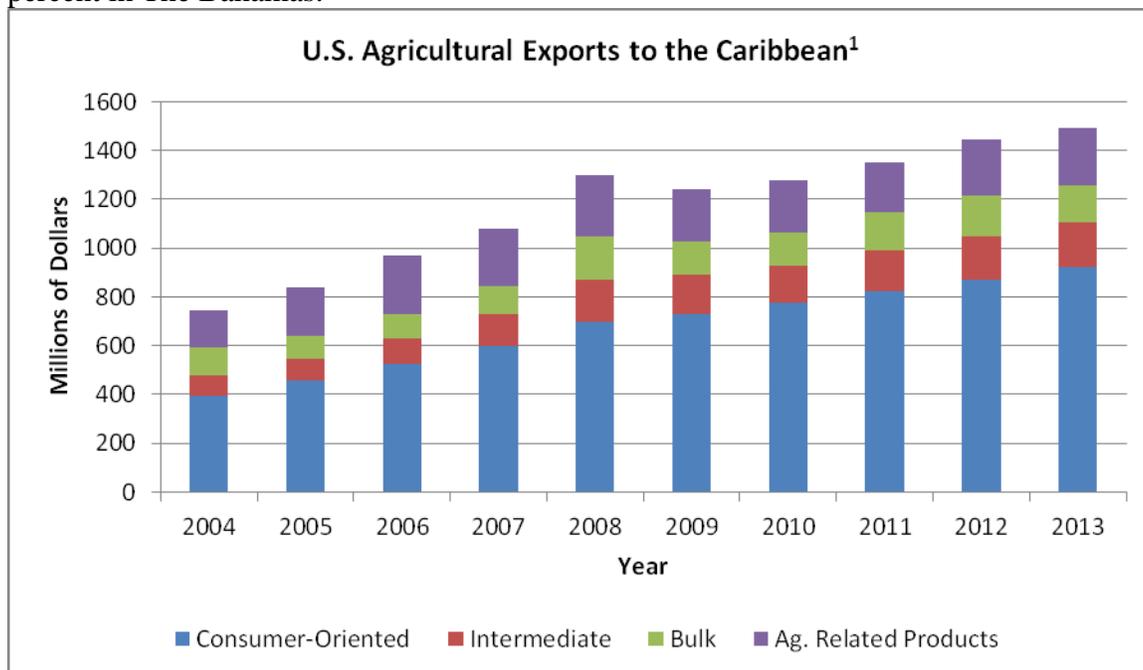
and regional scale, in support of biosafety management and national biosafety systems in the Caribbean;

- improve and consolidate biosafety information management within the Caribbean project countries in a way that can promote transparency, raise public awareness and facilitate the biosafety decision making, and be up scaled to provide broader regional information services as needed, and if possible, establish links to information sources.

Agricultural Trade Environment:

The U.S. balance of trade in goods and services with the CBATO islands has shifted dramatically in the past few years, going from a \$1.8 billion deficit in 2011 to a \$5.1 billion surplus in 2013. This is due in good measure to the large scale development of shale gas in the United States, which has reduced the demand for imports of liquefied natural gas and refined oil from countries such as Trinidad and Tobago, Aruba and Curaçao.

In terms of agricultural products, the United States had a \$1.38 billion positive trade balance with the CBATO islands in 2013. The United States imported \$113.8 million in agricultural and related products from the region, with seafood from The Bahamas and Trinidad and Tobago accounting for the lion's share (nearly 90 percent) of these imports. By contrast, the United States exported a record-high \$1.49 billion in agricultural and related products to the region (see Appendix III), up 3.3 percent from 2012. Consumer-oriented products alone, which account for over 60 percent of these exports, set a new high of \$925 million in the process. The top five exports markets within CBATO region are Trinidad & Tobago, The Bahamas, Barbados, Bermuda, and Aruba. Top export products are poultry meat and products, dairy products, prepared foods, snack foods, and beef and beef products. Overall U.S. market share is estimated at 55 percent, ranging from single digits in the French Antilles to as much as 95 percent in The Bahamas.



1 - Refers to the CBATO's region of coverage.
Source: U.S. Census Bureau trade data.

As the data demonstrate, the CBATO's region of coverage is quite open and receptive to agricultural imports from the United States. Many of the CBATO islands of coverage are WTO and Codex members. The Bahamas is in the process of becoming a member of the WTO. The current government has stated its intent to complete its accession by the end of 2015.

The United States does not have any bilateral trade agreements with individual countries in the CBATO region. In May 2013 a Trade and Investment Framework Agreement (TIFA) between the United States and CARICOM was signed. The TIFA is expected to serve as an avenue to address a range of trade, investment, and cooperation issues. The Caribbean Basin Economic Recovery Act (CBERA), which was expanded in 2000 through the U.S.-Caribbean Basin Trade Partnership Act (CBTPA), provides beneficiary countries with duty-free access to the U.S. market for most goods. Twelve of the CBATO islands of coverage are CBERA beneficiaries and three are CBTPA beneficiaries.

Prospects for increased trade between the CBATO region and third countries bear watching. Many leaders in the region have called for lower food import bills. CARICOM political leaders talk of boosting intra-regional food trade as a means of improving food security (see food security section below).

With regard to Europe, in 2008 the CARIFORUM countries¹ signed an EU-CARIFORUM Economic Partnership Agreement, which calls for gradual reductions of Caribbean tariffs to zero for a large share of agricultural goods from the EU over a 25-year period.

¹ Haiti signed the EPA in 2009. Cuba is not part of the EPA.

Implementation of the EPA, including CARIFORUM tariff reductions, has been uneven. National EPA Implementation Units are now in place in all signatory countries and coordinating these efforts is a regional EPA Implementation Unit based at the CARICOM Secretariat. The EPA stipulates that a comprehensive review of its implementation and its impact on development in the region is required within five years of the signature of the agreement.

CARICOM is also a party to trade agreements with Colombia, Cuba, Costa Rica, the Dominican Republic, and Venezuela. In addition, CARICOM has been negotiating a free trade agreement with Canada since 2008. Both sides have reportedly set a new goal of June 2014 to sign an agreement, but progress toward this goal remains unclear. In 2012 Canada exported \$194.2 million in agricultural, fish and forestry products to CARICOM-member countries, with wheat, fish, potatoes, pork and peas being the main export categories. In 2012 Canada also imported \$46.5 million in agricultural, fish and forestry products from CARICOM members, with lobster, beer, yams, papaya, and sauces and other seasonings rounding out the top five import categories.

CARICOM is looking as well at strengthening trade relations with other countries. The first ever CARICOM-Brazil Summit in 2010 addressed agricultural trade. China, India, Argentina and Chile are other countries with the potential to become significant trading competitors in the Caribbean.

The expansion of the Panama Canal, which is expected to conclude by 2015, could affect trade patterns in the region. Freeport in The Bahamas can already accommodate post-Panamax vessels, while some other ports in the region, namely Miami, Mariel (Cuba) and Kingston (Jamaica), have made huge investments to ready themselves for the larger container ships. Exactly how international distribution channels for goods from Asia in the Caribbean Basin will be affected by the Panama Canal expansion remains to be seen.

Sanitary and Phytosanitary (SPS) and Ag-Related Technical Barriers to Trade (TBT) Issues and Regulatory Systems:

Practically all the CBATO islands of coverage are quite receptive to imports of U.S. agricultural products.

Sanitary product registration, laboratory testing, special certification, and pre-market approval are not required to import the vast majority of foodstuffs into most islands. For products that do require import approval or certification (mainly meat and poultry, dairy, seafood, and produce), most countries try to follow international standards and guidelines. U.S. labels are generally accepted without a problem, although occasionally issues arise with labels not fully complying with country of origin and expiration date requirements. These problems can usually be resolved, at least temporarily, with stick-on labels.

In most islands, food safety responsibilities fall under the Ministry of Public Health or its equivalent. The Ministry of Agriculture may also play a role with plant and animal products, both in terms of public health and in terms of plant and animal health. The fragmented nature of the Caribbean has contributed to the development of a number of differences from country to country in SPS and other regulatory requirements and procedures. Resources available to fund regulatory systems, including enforcement, vary widely as well. Exporters are strongly advised to verify that their products comply with the export market's regulatory requirements prior to shipping.

Technical dialogue on animal and plant health matters in the region remains fruitful. The Caribbean Animal Health Network (CaribVET) provides a forum for addressing veterinary issues in the broader Caribbean region. CaribVET is a joint network of institutions and professionals aiming to improve animal health and the quality and safety of animal products throughout the Caribbean. Similarly, the Caribbean Plant Health Directors (CPHD) meet annually, offering participants the opportunity to explore areas of common interest. Both CPHD and CaribVet have established several technical working groups to address specific phytosanitary and zoosanitary issues.

Food Security:

Not surprisingly, food security is of critical concern to the CBATO region due to the potential of supply disruptions by hurricanes and other external shocks. Many island governments are making efforts to promote greater food production (see the Agricultural Policy section). CARICOM adopted in October 2011 a five-year action plan to set in motion its Regional Food and Nutrition Security Policy. The policy identifies four overarching objectives:

- Food Availability – Promote the sustainable production, processing, preparation, commercialization and consumption of safe, affordable, nutritious, high quality Caribbean food commodities/products.
- Food Access – Ensure regular access of Caribbean households, especially the poor and vulnerable, to sufficient quantities of safe, affordable, quality foods at all times, particularly in response to diverse socioeconomic and natural shocks.
- Food Utilization/Nutritional Adequacy – Improve the nutritional status of the Caribbean population, particularly with respect to non-communicable diseases including diabetes, hypertension and obesity.
- Stability of the Food Supply – Improve the resilience of the region’s national communities and households to natural and socio-economic crises.

Facilitation of regional trade, import substitution, and regional stocks also are elements of the policy’s regional food sovereignty concept. The “continental” members of CARICOM, Belize, Guyana and Suriname, aspire to play an important role in producing food for the CARICOM region. CARICOM’s Caribbean Agricultural Research and Development Institute is focusing its efforts upon: small ruminants (sheep and goats), papaya, hot pepper, poultry, sweet potato, aquaculture, vegetables, coconut, cassava, golden apple, red pea, cow pea, and marine fish. Some countries are also focusing on strengthening their poultry (and to lesser extent meat and dairy) production.

Advantages and Challenges for U.S. Suppliers

Advantages	Challenges
The United States has a dominant market share in the vast majority of Caribbean islands (estimated at 55 percent overall).	Ocean transportation rates from the United States can be more expensive than those from Europe.
Proximity and frequent transportation service to the region work to the advantage of U.S. suppliers.	Tourism is a major sector in much of the Caribbean. Hence, economies remain very susceptible to factors that may disrupt tourism (i.e. the world economy, terrorism, more active hurricane seasons, etc.).
U.S. exporters, particularly south Florida consolidators, service the market very well and are in many ways better positioned to supply the Caribbean than competitors.	The nature of individual island markets requires special effort from US exporters: dealing with several small accounts; consolidation of small orders; complying with different import requirements for select products; ascertaining different market characteristics in every island.
With little arable land and food production, the Caribbean must import most of its food needs.	In some markets such as the French West Indies, the traditional ties with Europe are a key constraint. Chefs in many islands are European-trained and thus prefer European products.

The regulatory environment at present is fairly open to U.S. products.	European suppliers may benefit increasingly from tariff reductions resulting from the 2008 trade agreement between the Caribbean and the EU. CARICOM is also negotiating a free trade agreement with Canada.
Although the region's tourism industry is undergoing difficult times, it continues to generate demand for U.S. products.	
Exposure to U.S. media as well as language, cultural, and commercial ties with the United States all contribute to consumers having a positive attitude toward U.S. products.	

Appendix I. Caribbean Islands at a Glance

(2013 Statistics, except where noted)

Island / Country	Population (Mid-year estimate)	Stop-Over Tourist Arrivals	GDP (Purchasing Power Parity)	Real GDP Growth (%)	GDP Per Capita (ppp)	Inflation (Consumer Prices, %)	Public Sector Gross Debt (% of GDP)
Anguilla	15,754	69,068	\$175.4 mill ⁴	-8.5 ⁴	\$12,200 ⁵	4.4	n/a
Antigua & Barbuda	90,156	243,932	\$1.562 bill ¹	1.6 ¹	\$17,800 ¹	3.4 ¹	88.4
Aruba	109,153	979,256	\$2.516 bill ⁴	2.4 ⁸	\$25,300 ²	0.6 ¹	n/a
The Bahamas	319,031	1,363,487	\$11.04 bill ¹	1.8 ¹	\$31,300 ¹	2.0 ¹	56.4

Barbados	288,725	508,520	\$6.961 bill ¹	0 ¹	\$25,000 ¹	4.8 ¹	90.4
Bermuda	69,467	236,343	\$5.6 bill ²	-3.5 ²	\$86,000 ²	2.4 ¹	n/a
British Virgin Islands	31,912	355,677	\$500 mill ³	1.3 ³	\$42,300 ³	2.2 ¹	n/a
Caribbean Netherlands	21,133 ³	n/a	n/a	n/a	n/a	n/a	n/a
Cayman Islands	53,737	345,387	\$2.25 bill ⁵	1.1 ⁵	\$43,800 ⁹	1.2 ¹	n/a
Curaçao	146,836	440,044	\$2.838 bill ⁵	0 ¹	\$15,000 ⁹	2.3 ²	n/a
Dominica	73,286	78,277	\$990 mill ¹	-1.7 ¹	\$14,600 ¹	2 ¹	71.4
Grenada	109,590	116,456	\$1.471 bill ¹	0.5 ¹	\$14,000 ¹	3.2 ¹	n/a
Guadeloupe	403,977	416,000	n/a	n/a	n/a	n/a	n/a
Martinique	390,371	489,706	n/a	n/a	n/a	n/a	n/a
Montserrat	5,189	7,202	\$43.78 mill ⁷	3.5 ⁵	\$8,500 ⁷	4.8 ¹	n/a
Saint Barthélemy	7,298	n/a	n/a	n/a	n/a	n/a	n/a
Saint Kitts & Nevis	51,134	102,066	\$921 million ¹	-0.9 ¹	\$16,100 ¹	1.4 ¹	110.0
Saint Lucia	162,781	318,626	\$2.181 bill ¹	-0.9 ¹	\$13,000 ¹	4.2 ¹	76.5
Saint Martin	31,264	n/a	\$561.6 mill ⁸	n/a	\$19,300 ⁸	n/a	n/a
Saint Vincent & The Grenadines	103,220	71,725	\$1.291 bill ¹	1.5 ¹	\$11,800 ¹	2.6 ¹	64.9
Sint Maarten	39,689	467,259	\$794.7 mill ³	1.6 ¹	\$15,400 ⁵	4 ¹	n/a
Trinidad & Tobago	1,225,225	403,400	\$26.35 bill ¹	0.2 ¹	\$19,800 ¹	9.2 ¹	44.7

Turks & Caicos	47,754	290,587	\$632 mill ⁶	11.2 ⁶	\$29,100 ⁶	2.5 ¹	n/a
TOTAL	3,796,682	6,835,759	n/a	n/a	n/a	n/a	n/a

1. 2012 est.; 2. 2011 est.; 3. 2010 est.; 4. 2009 est.; 5. 2008 est.; 6. 2007 est.; 7. 2006 est.; 8. 2005 est.; 9. 2004 est.

Source: Population data from CIA World Factbook, Euromonitor, and Central Bureau of Statistics of the Netherlands Antilles; Tourist arrival data from Caribbean Tourism Organization, Euromonitor, Eastern Caribbean Central Bank, and Turks and Caicos Tourist Board; GDP & inflation data from CIA World Factbook, debt figures from UN/ECLAC, Preliminary Overview of the Economies of Latin America and the Caribbean.

Appendix II. Caribbean Agriculture at a Glance

Island / Country	Land Area (sq. km.) / % Arable	Ag % of GDP	% of Labor Force in Ag.	Crop Prod. Index 2011 ('04-'06 =100) ¹	Food Prod. Index 2011 ('04-'06 = 100) ²	Agricultural Products
Anguilla	91 / 0	2.5	4	n/a	n/a	Small quantities of tobacco, vegetables; cattle
Antigua	443 / 18.2	2.2	7	115.5	114.5	Cotton, fruits, vegetables, bananas, coconuts, cucumbers, mangoes, sugarcane; livestock
Aruba	180 /	0.4	n/a	n/a	n/a	Aloes; livestock; fish

	10.5					
The Bahamas	10,010 / 0.6	2.1	5	140.0	128.9	Citrus, vegetables; poultry
Barbados	430 / 37.2	3.1	10	78.9	93.3	Sugarcane, vegetables, cotton
Bermuda	54 / 20	0.7	3	126.0	115.9	Bananas, vegetables, citrus, flowers, dairy products, honey
British Virgin Islands	151 / 20	1.1	0.6	n/a	n/a	Fruits, vegetables; livestock, poultry; fish
Caribbean Netherlands	322 / n/a	n/a	n/a	n/a	n/a	Very limited agriculture
Cayman Islands	264 / 3.9	0.3	1.9	110.0	109.7	Vegetables, fruit; livestock; turtle farming
Curaçao	444 / 10	0.7	1.2	n/a	n/a	Aloe, sorghum, peanuts, vegetables, tropical fruits
Dominica	751 / 6.7	15.3	40	111.6	109.1	Bananas, citrus, mangoes, root crops, coconuts, cocoa
Guadeloupe	1,628 / n/a	15	15	n/a	n/a	Sugarcane, bananas, vegetables, plantain, cocoa, flowers, root crops
Grenada	344 / 5.9	5.2	11	86.3	90.4	Bananas, cocoa, nutmeg, mace, citrus, avocados, root crops, sugarcane, corn, veg.
Martinique	1,128 / n/a	6	n/a	n/a	n/a	Sugarcane, bananas, pineapples, cut flowers, avocados,

						citrus, vegetables; fish
Montserrat	102 / 20	1.6	n/a	n/a	n/a	Cabbages, carrots, cucumbers, tomatoes, onions, peppers; livestock products
St. Barthélemy	21 / n/a	n/a	n/a	n/a	n/a	No significant agriculture
St. Kitts & Nevis	261 / 19.4	1.9	n/a	28.3	36.3	Sugarcane, rice, yams, vegetables, bananas; fish
St. Lucia	606 / 6.5	3.2	21.7	83.9	70.2	Bananas, coconuts, vegetables, citrus, root crops, cocoa
St. Martin	54 / n/a	1	n/a	n/a	n/a	No significant agriculture, limited fish
St. Vincent & the Grenadines	389 / 18	5.4	26	114.6	99.3	Bananas, coconuts, sweet potatoes, spices; cattle, sheep, pigs, goats; fish
Sint Maarten	34 / 10	0.4	1.1	n/a	n/a	Sugar
Trinidad & Tobago	5,128 / 14.6	0.3	3.8	83.1	104.9	Cocoa, rice, citrus, coffee, vegetables; poultry
Turks & Caicos	948 / 2.3	1	20	n/a	n/a	Corn, beans, cassava (tapioca), citrus fruits; fish

1. Crop production index includes all crops except fodder crops.

2. Food production index covers food crops that are considered edible and that contain nutrients. Coffee and tea are excluded because, although edible, they have no nutritive value.

Source: CIA World Factbook, World Bank (World Development Indicators), Euromonitor & CBATO research.

Appendix III. U.S. Agricultural Exports to the Caribbean, CY2013

(Thousands of Dollars)

	CBATO Islands	Cuba	D.R., Jamaica, Haiti	All Caribbean
Bulk	152,196	96,918	717,132	966,246
Intermediate	180,508	93,403	444,860	718,771
Consumer-Oriented	925,028	158,617	760,774	1,844,419
Ag. Related Products				
Forest products	175,553	0	122,163	297,716
Fish Products	35,377	0	17,349	52,726
Distilled Spirits	17,310	0	9,247	26,557
Biodiesel (B100 equiv.)	3,789	0	373	4,126
Ethanol (non-bev.)	290	0	29,211	29,501
TOTAL	1,490,051	348,938	2,101,109	3,940,098

Source: Derived from U.S. Bureau of the Census trade data.

Appendix IV. CBATO Island Representation in Selected International Organizations

Country/Island	CARICOM	OECS	CARIFORUM	IICA	ALBA	Petro-Caribe
Anguilla	Assoc. member	Assoc. member				
Antigua & Barbuda	Yes	Yes	Yes	Yes	Yes	Yes
Aruba	Observer					
The Bahamas	Yes		Yes	Yes		Yes
Barbados	Yes		Yes	Yes		
Bermuda	Assoc. member					
British Virgin Islands	Assoc. member	Assoc. member				
Caribbean Netherlands						
Cayman Islands	Assoc. member					
Curaçao						
Dominica	Yes	Yes	Yes	Yes	Yes	Yes
Grenada	Yes	Yes	Yes	Yes	1/	Yes
Guadeloupe						
Martinique						
Montserrat	Yes	Yes				
Saint Barthélemy						
Saint Kitts & Nevis	Yes	Yes	Yes	Yes	1/	Yes

Saint Lucia	Yes	Yes	Yes	Yes	Yes	Yes
Saint Martin						
Saint Vincent & The Grenadines	Yes	Yes	Yes	Yes	Yes	Yes
Sint Maarten						
Trinidad & Tobago	Yes		Yes	Yes		
Turks and Caicos Islands	Assoc. member					

1/- Seeking membership.

Source: CBATO research.