

USAID/GEO
GUYANA ECONOMIC OPPORTUNITIES

**RAPID RECONNAISSANCE SURVEY OF THE
EXPORT POTENTIAL OF GUYANESE PRODUCTS
IN CARIBBEAN MARKETS**

GUADELOUPE

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GUADELOUPE

BACKGROUND NOTES

Guadeloupe is an archipelago composed of two large islands, Basse-Terre and Grande-Terre and seven other smaller islands in the Caribbean. Basse-Terre is of volcanic origin and has the highest peak in the Lesser Antilles, Mount Grande Soufrière, 1,467 m. Grande-Terre is a low limestone island, with a maximum altitude of 145 m. The two islands are separated by the Rivière Salee. With the two exceptions of Sr. Barthélémy and Les Saintes, which are volcanic, the other islands are limestone.

Guadeloupe is the most northerly of the Windward Islands. Dominica is south of Guadeloupe and St. Maarten is to the north. Guadeloupe is 140 km north of Martinique and 2,000 km south of the United States.

Temperatures are an average 27° C on the lower slopes of the island and 23 C° at the higher elevations. Basse-Terre's mountains are covered with tropical forest and, due to the prevailing northeast trade winds, receives as much as 393 inches of rain annually. Grande-Terre receives only 45 inches, on an average, annually.

According to the 1999 census the population of Guadeloupe was an estimated 422,222 persons. In that year, some 49.9% of the population of Guadeloupe was concentrated in the arrondissement (county) of Pointe-à-Pitre. The most populated cities are Les Abymes and Pointe-à-Pitre. By 2001, the population had grown to an estimated 431,170. The city of Baie Mahault, east of Pointe-à-Pitre, has grown rapidly in recent years, at the expense of Pointe-à-Pitre, and is an important industrial and shipping area.

The literacy rate is 91% and education is obligatory until the age of 16 years.

Guadeloupe is a department of France. Its citizens are French; the official language is French and Guadeloupe is subject to the laws of France and regulations of France and the European Union. Guadeloupe is not a member of CARICOM but is a member of the Association of Caribbean States (ACS) and among the goals of the ACS is increased intra-regional trade as well as economic cooperation in trade.

France has targeted Guadeloupe for sustained economic development through financial assistance from its programs for the underdeveloped regions of France and from the EU through its European Funds. The next "Contrat de Plan 2000-2006" is underway and focuses on two objectives: employment and the environment. The program is comprised of four components: social affairs, economics, spatial development and ecology. Investments in training, modernization of public facilities, city development and

industries, trade, crafts, tourism, fishing and all aspects of agriculture. Further investments in roads, communications systems and rural development are planned. The ecological component includes measures to improve water policies, energy system development and protection of the natural systems that attract tourism.

Infrastructure

Road System

Guadeloupe has a well-developed modern road system that facilitates access to all of the towns and cities on the island.

Maritime Ports

The maritime port system of Guadeloupe is state-run. Over 90% of export activities is handled through the national port system. There are two major seaports with cargo-handling capacity on Guadeloupe, one of which is located at Point-à-Pitre and the other at Basse-Terre. There are two other ports in Guadeloupe, one at Marie-Galante, whose services are oriented towards inter-island passenger traffic, and a second at Bas-du-Fort, for pleasure craft.

The Point-à-Pitre port is the more active cargo seaport around which a large industrial and commercial zone has been developed. The World Trade Center Complex was built in 1994 at Point à-Pitre and houses the Customs Office, Chamber of Commerce and World Trade Center.

The second port of Basse-Terre is a 300 m long wharf that handles cargo from ferries and inter-island cabotage. Basse-Terre receives around 8-10% of the cargo coming into Guadeloupe.

Airports

The international airport of Pôle Caraïbe is also located in the plain of Lamentin near Point à-Pitre. The airport handles cargo, including perishable goods. The airport was re-modeled in 2001 and has beautiful, new facilities including a new facility for the Frontier Inspection Port Authority for incoming cargo.

ECONOMIC OUTLOOK

An understanding of the overall health and growth trends of the economy of the target market is important to prospective exporters of goods and services as it affects the level and growth in demand and prices, consumer purchasing habits and the level of competition. Growing economies offer more opportunities for sales of imports with less local opposition and in a less competitive environment. However, contracting economies usually result at some point in lower overall demand, lower prices and a tendency towards bargain hunting, lower-cost product substitution and more purchases of domestically produced goods (import substitution) by consumers. It also results in

increased competition among suppliers for buyers, usually through increased sales efforts of offering better services or lower prices than their competitors.

In 2001, INSEE (Institute National de la Statistique et des Études Économiques) published their most recent estimates of the total GDP of Guadeloupe for 1993 through 1997. The GDP rose continuously through the five-year period from 3,992 million euros to 4,801 million euros in 1997, an increase of 20% for the period. In 1997, the average GDP per capita stood at 11,602 euros, which was 55.5% of the per capita GDP in France for that year, an improvement of 1.6% over 1993.

In March of 2002, the inflation rate for the previous 12-month period was 2.5% and the unemployment rate was reported to be 24.2%.

On the basis of contribution to GDP, the major components of the economy of the department of Guadeloupe are:

- Service industry (tourism and commerce) 50%
- Agriculture 4%
- Industry 7%
- Public works 11%
- Government 28%

In terms of employment, the two most important non-public sectors of the economy of Guadeloupe are tourism and agriculture.

Guadeloupe's major agricultural export crops are banana, cane (sugar, molasses and rum), melons, coffee, cocoa and vanilla. There has been a long-term tendency of declining importance of the agricultural sector to the economy. Between 1989 and 2000, the number of farms dropped from 16,530 to 12,099, a 27% decrease, and the area tilled decreased by 11% over the same period. Although, total exports increased by 22% in 2000, the export value of all of the important agricultural products declined in 2001 in part as a result of a severe drought, which negatively affected production levels. There are efforts on the part of the government to encourage and assist diversification efforts. One of the projects supports the production of cut flowers.

Tourism, which includes hotels and the related service industries of restaurants, transportation (taxis, car and van rentals and buses), merchandise and art and crafts; is a very important source of GDP. However, as for the rest of the Caribbean, Guadeloupe has experienced a gradual decline in this sector over the last six years.

In 2001, Guadeloupe had 162 hotels with a total capacity of 8,019 rooms, which represents an increase in hotel capacity of 14% over a ten-year period. In 1997, the room occupancy rate hit a high of 70% but this declined to nearly 60% by 2001. A worrisome continued drop in occupancy rate was experienced in the first quarter of 2002 when the occupancy rate was 14.1% less than for the first quarter of 2001. By 2001, several hotels were already in seriously weak financial positions, with declining occupancy rates. Some

hotels have either been closed or were on the brink of closure at the time of this report. A recent article (September 13, 2002) in the local newspaper reported that the occupancy rate of the Meridien hotel was deteriorating (only two rooms pre-booked for October) and the hotel is expected to declare bankruptcy.

The reason for falling occupancy rate is the arrival of fewer and fewer tourists to Guadeloupe. Cruise ship arrivals hit a ten-year high in 1996 with 429 cruise ships arriving with a record 610,544 passengers. However, since 1996 there has been a gradual decline and in 2001 only 325 cruise ships arrived with 361,715 passengers. There was a brief improvement in the number of cruise ship arrivals in 2000 when the number rose to 498 ships with 392,318 passengers but this level of improvement was not sustained in 2001.

Not surprisingly, the airline industry has been hard hit in the last few years. In 2000, two charter airlines suspended service (Air Calypso was terminated and AOM Liberty services experienced poor performance). One regularly scheduled airline was lost in 2001, AEROLYN, for a total loss of available seating of 18% by 2001. Increased cost for air travel also negatively affected air travel during the year. The number of arriving passengers between 2000 and 2001 dropped by 10.4 % to 1,896,000, which is nearly the 1998 level of arrivals.

Tourism in Guadeloupe, despite its rich natural beauty and potential for eco-tourism, has suffered from decreased productivity, poor service quality, high costs, poor management, aging hotel structures, insufficient promotional activity and increased insecurity due to social conflict. Increased competition from the other Caribbean vacation destinations with more dynamic promotional programs and fewer social problems has impacted the sector as well.

The results of a survey of the heads of business enterprises conducted in April, 2002 revealed that 80% of the respondents reported stagnant or reduced industrial activity in the first quarter and 60% expected a continued drop in activity in the second quarter. More alarmingly, 80% reported that they were experiencing financial problems. Businesses in the retail sector reported having fewer difficulties in the first quarter. Sales prices had been increased to cover increased costs of transportation, labor and merchandise. Margins had fallen and retailers were anticipating the necessity of increasing prices in 2002 to restore margins. Of the retailers sampled, 44.4% reported having financial problems. In general, the report concluded that the overall outlook was pessimistic for the year 2002.

Although the current economic situation of Guadeloupe is not positive, the fact that the current domestic supply of many food products is unequal to demand makes the importation of food products an unavoidable necessity. In 2001, the tonnage of imports for agricultural products, lumber and fish increased to 106,037 metric tons (mt), an 8.8% increase over imports of 2000 and an increase of 18.7% over the volume imported in 1999. Also, the value of the 2001 imports was about 46.1 million euros, a 10.5 % increase in value of imports over the 2000 level.

THE DISTRIBUTION CHANNEL FOR FRUITS AND VEGETABLES; RED MEATS, FISH AND SEAFOOD; AND SELECTED SAUCES, SEASONINGS AND PRESERVES

DOMESTIC SUPPLY

Fruit and Vegetable

The area under cultivation in truck farming (non-plantation horticultural) crops in Guadeloupe is around 3,000 ha. These products are produced mainly for local consumption and consist mostly of roots and tubers (sweet potatoes, yams, madère, cassava and malangas) and plantain, christophene, eggplants, melons and tomatoes. Production levels have fluctuated over the last five years due to weather conditions (principally the result of Hurricane George in 1998 and a particularly severe drought at the beginning of 2001), but are generally increasing due to new government emphasis on crop diversification. Fruits being studied and promoted are pineapples, papaya, grenadine, passion fruit, mango and citrus. The Centre de Coopération Internationale en Recherche Agronomique pour le Développement (“Center for International Cooperation in Agronomic Research and Development” - CIRAD) is actively engaged in a program of introduction of new varieties and development of improved plant materials for these fruits. Nevertheless, at the present time there is still a wide gap between domestic production levels and demand, which must be filled with imports.

Red Meats

Consumption of meat in Guadeloupe is an estimated average of 25,000 metric tons annually, of which nearly three-fourths of the demand is filled by imports. In 2000, total meat production was around 5,957 metric tons, of which 83% was large livestock (beef, sheep, goat and pork), 13.5% poultry and 3.5% rabbit.

In 2000, Guadeloupe was reported to have a high demand for goat meat but insufficient domestic production to fill market demand. It was estimated that only 40% of total demand was supplied domestically. Also, local production is disconnected from the market and so little of it ends up in the formal market system. At the time of the report, some 50% of the production was either for personal consumption or the creation of occasional additional income. Of the remaining half of the producers, 38%, were commercial breeding operations and another 12% were highly organized producers who also had well established marketing channels and markets.

The report also estimated that nearly 53% of the butchers in Guadeloupe are traditional retailers of which some 40.6% offer fresh meat cuts only and 12.5% retail value-added products such as pâtés, sausages and cold cuts as well as meat cuts. Of the remaining butchers, 12.5% sell all types of meat in district markets and 34.4% mainly retail frozen imported meats to large urban markets. (G. Alexandre et al, May 15-21, 2000,

“Commercial Practices of Goat in the Meat Market by Producers and Butchers in Guadeloupe,” 7th International Conference on Goats, Tours, Poitiers, France).

Fisheries

According to the Food and Agriculture Organization (FAO), the annual catch of Guadeloupe has increased by 20% over the last ten years, mainly due to increased deep-sea fishing. In spite of this increase, aquaculture and fisheries activities do not produce enough supply to cover the annual domestic demand of 13,000-15,000 metric tons. In spite of several attempts to restructure the industry recently, the cooperative sector is dominated by a single cooperative, la Cooperative des Marins Pêcheurs de la Guadeloupe (“Sea Fisheries Cooperative of Guadeloupe” COMAPEGA). COMAPEGA, founded in 1976, has six sales points in Guadeloupe and there were plans to open a seventh in Desirade in 2002. Total revenue of the cooperative is around 3 million euros annually.

The exact number of fishermen is not known. There are around 1,206 professional fishermen; but, as for the other islands, fishing is an activity that many engage in on a part-time basis or when unemployed.

Estimates of the annual catch for 2001 were around 10,000 metric tons, including fish, crustaceans and mollusks. The distribution channel structure for marketing fish and seafood is well established in Guadeloupe. There are around 150 landing points, most of which are around Pointe-à-Pitre (where there is a large covered market on the waterfront in the heart of the city) and Basse-Terre. Direct sales to the consumer absorb over 70% of the catch. The remainder is sold to intermediaries.

There is pond production of fresh water shrimp but it is in the infant stage of development.

THE WHOLESALERS AND DISTRIBUTORS

The four most important food distributors, who also own supermarkets, in Guadeloupe are: (1) **Groupe Primistères Reynoird** (Bouriez family), which controls Cora (bought out in April 2000), Match and Ecomax supermarkets; (2) **Groupe SAFO** (Groupe Gerard Huygues Despointes), which manages Marché Conseil, Huit à Huit superettes and Champion supermarkets (3) **Groupe Hayot**, which manages the hypermarket Carrefour in Complex Destrellan and the Continent supermarkets and (4) **Groupe Le Metayer**, which manages Leader Price and Discounts Outre-Mer (DOM).

Many of the large-scale retailers such as SCI Destrellan (Groupe Hayot), Exo 7, Leaderprice, Primistères Reynoird (a “hard discounter”) and SOFRIBER, import in large volumes. The majority of the imports are from France and, in fact, some of these are merely extensions of large wholesalers/exporters in France. Other products may be

imported from the US, other European countries, Canada, New Zealand, Asia and the Caribbean (See Annex II).

Many of the large-scale retailers are also distributors. Many distributors are wholesale/importers. A 2000 list of the distributors and wholesalers of food products is available in Annex II. Some of these strictly import and distribute frozen foods, whereas some others handle a variety of food products.

Independent wholesalers control the majority of food imports. Independent wholesalers usually do not own or operate retail businesses. These supply all retailers, including supermarkets and the hotel and restaurant industry (HRI). Most tend to specialize in particular lines of products such as dry goods, frozen meats, beverages, etc and act as manufacturers' agents or distributors. However, the larger independents handle all categories of foods, both fresh and frozen and tend to be the more important suppliers to one or more retail groups. Examples of this are SOGEDIAL and SODIAL Nouy. SOGEDIAL is composed of CADI Surgeles, SOFRIBER and SOFROI and supplies Groupe Destrellan. SODIAL Nouy supplies the Groupe Reynoird retailers: Cora and Match.

Wholesalers and distributors are the most important contacts for exporters to access the food markets of Guadeloupe. They basically control imports of food products from sources other than France. They have incentive to seek out other suppliers and promoting new products. Importing wholesalers usually work on credit. Pay out period may be longer than that of US counterparts, who usually pay at around 30 days. I was told that at times the pay out could be stretched out as much as 45-60 days. I would recommend verifying and negotiating pay out period before shipping to avoid a surprise. Cash on delivery and advances, I was told, were unlikely to be conceded, but one should ask.

In Annex I a summary table of prices paid farmers by various buyers and those of the wholesale and retail markets is provided for f&v. Retail prices only are provided for meats and fish and seafood.

THE RETAILER SECTOR

Guadeloupe still has a number of popular public markets for f&v and fish and seafood. The sale of f&v along sidewalks and roads is still popular as well. However, more formal retail of f&v is rapidly making headway on the island as consumers become more sophisticated and as supermarkets engage in more promotion and advertising.

The supermarket retail sector of Guadeloupe is well developed, complex and modern. Also, f&v, red meats and fish and seafood are sold by green grocers, butchers and fishmongers as well as through supermarkets.

European products dominate supermarket inventories. More than 90% of food imports are European and most of those are French. The large volume of imports and the

increasing influence of supermarkets as food retailers are changing consumers purchasing behavior. Consumers are rapidly developing a taste for European products, which is resulting in fewer purchases of traditional food products. Also, purchases are now generally weekly, which are increasingly being made with debit and credit cards, rather than cash and checks.

While the supermarkets are trying to promote locally manufactured products such as juice, jams, sauces, bakery goods, etc. and actually set objectives of handling a minimum percentage of stock in local products, consumers have become very brand loyal to imports and prefer to buy imported products over the locally manufactured products.

There are a large number of supermarkets and hypermarkets in Guadeloupe, most of which are concentrated in and around Pointe-à-Pitre, Les Abymes and Baie Mahault. As will be seen in a few paragraphs, many of these are members of the same food distributor group, and so would receive much of their supplies through the importing arm of their respective group. A list of supermarkets on Guadeloupe is provided in Table 1 of Annex II. This list is not exhaustive. A number of one-outlet markets were left off the list. Also, most of the supermarkets listed have outlets at least in one of the three urban areas listed above. This cluster is close to the Pointe-à-Pitre port, where demand would be greatest for imports and lower transportation costs would be lower due to their proximity to the port.

In 2000, the number of hypermarkets increased from 3 to 4 with the construction of the new Carrefour in the Centre Commercial Le Milenis, near the international airport. In the same year, the number of supermarkets increased by 2 from a total of 44 in 1999 to 46 in 2001. By the end of 2001, the total square area of supermarkets in Guadeloupe had risen to 55,276 m² with a density of 130.9 m²/1,000 inhabitants. In comparison, Martinique had only 66.5 m² in 1999.

Visits were made to an ECOMAX and Leader Price in Gosier, a Leader Price in Baie Mahault, the Carrefour in the Destreland Complex, the Carrefour in the Milenis Mall and a Match in Pointe-à-Pitre.

I was forewarned that the ECOMAX was the supermarket of choice for cost conscious buyers in Gosier but that it was not “very nice”. It offered mainly dry goods, frozen foods and a very small and poorly managed fresh vegetable selection that consisted mainly of imported products and a few roots and tubers. The condition of the “fresh” products was very poor and as it did not seem to be representative of most supermarkets’ produce sections and had so few fresh products, I did not bother to record any of the fresh f&v prices from this store.

Leader Price (LP), La Grande Marque Européene (“The Great European Trade Mark”), is an international supermarket chain that promotes itself as a budget supermarket. Nevertheless, the store was suggested as a better choice (in comparison to the ECOMAX). Leader Price supermarkets appear to be managed more like a warehouse type of supermarket on a small scale, with tall stacks of products. In both Gosier and Baie Mahault, the LP was clean, well lit and well managed and had between 6-8 aisles. The

f&v section was small but contained a better selection than the one ECOMAX visited. The LP in Baie Mahault had a larger f&v and meat selection than did the store in Gosier. The Baie Mahault LP was almost no selection of fish and seafood; whereas the LP in Gosier had some of the more expensive fish & seafood in the frozen section. The difference in offerings might be due to the higher number of tourists in Gosier who are not going to shop in the wholesale markets and who prefer more expensive selections. The red meat section in the LP Baie Mahault contained rabbit, lamb and pork but no beef.

The Carrefours are the premier luxury hypermarkets. Carrefour is one of the largest transnational supermarket chains in the world. Both are located in a mall, one in the SCI Destreland Complex and the other in the Centre Commercial Le Milenis, and appeared to be the anchor store for their respective mall. Both have more than 40 aisles and checkout counters. The Destreland Complex Carrefour was visited at lunchtime and was full of shoppers. The Milenis Carrefour was visited in the early evening, after six pm, and was full of shoppers as well although the rest of the mall was relatively quiet. Both have a large f&v section and both fresh and frozen meat and fish and seafood areas.

The fresh meat section feature both locally produced and imported meats. Some of the cuts are pre-prepared for cooking (cleaned and tied roasts, for example). Nearby are the cold cuts and a large selection of pate. The meat selection includes horse, veal, lamb, beef, mutton, goat, rabbit, chicken and duck.

The fresh fish & seafood section was small in comparison to the very large selection of frozen fish & seafood. Also found in the fresh section were dried, salted fish. Much of the frozen fish & seafood is imported from the US, Indonesia and Thailand.

The origin of the f&v is prominently displayed in the Carrefours with the price for the commodity. Most of the cool climate products are imported from Europe, mainly from France, Holland, Spain and Italy. Costa Rican roots and tubers are in the mix, with igname and white sweet potatoes. Most of the remaining products were identified as from Dominique, Martinique or Guadeloupe (malanga, madère, etc.). For some products there were bins with product from more than one origin.

Fruits and Vegetables

Notable was the varietal difference of some products in comparison to other markets in the Caribbean. For example, the pumpkin is a smaller, light-coloured pumpkin not the large, dark green pumpkin found in the markets on many of the islands. There was a larger variety of roots and tubers: igname de chine and igname. The sweet potatoes are white-fleshed. Eddoes were not found but the madère was found in most produce sections.

Conspicuously missing in all of the supermarkets in Guadeloupe that were visited were cassava and sweet corn. Sweet corn was almost always available in supermarkets on the other islands surveyed.

Pineapples varieties found in the supermarkets in Guadeloupe were of two types: one being a Sweet Cayenne or Champaka, which are the most common commercial varieties sold worldwide (and which are very similar in appearance and have a shoulder) and the other being a shoulder-less, elongated cone-shaped variety similar to that found in Guyana.

A largish, dark green variety of ice box-size watermelon was commonly offered in supermarkets but none of the larger, longer varieties (Charleston Grey, for example) were found nor were either the small ice box nor seedless varieties. Melons and watermelons are being produced on Guadeloupe for export and local sales. However, more than one person commented that watermelons were not as popular as were melons with local consumers.

The christophene (chayote) found in most supermarkets was a medium-sized white variety, like a “Perolero” type, but somewhat more spiny, instead of the more common smooth green and dark green spiny types found elsewhere in the islands. This is one of the crops that is being produced in Guadeloupe and exported.

Papayas were in the produce section of both of the Carrefours but not found in other supermarkets and the comment was made in both Guadeloupe and Martinique that papayas were not as popular as other fruits. The type found was an intermediate sized fruit. It was too large to be a Solo type, which is grown commercially for the US and European market, nor was it as large as the “criollo” type found throughout Latin America.

All of the eggplants found in the supermarkets surveyed were the Italian type in form but were an attractive, eye-catching white and purple striped variety not the dark purple type more familiar to Central America and the US. Okra was not uncommon but was not found in all supermarkets surveyed.

None of the “oriental” vegetables (long bean, long squash, bitter melon) were found in any of the supermarkets surveyed. Green beans were more like the runner-type of green beans commonly found in the US and EU. No French green beans were offered, however. Shallot, which appears to be a very strong-flavored green onion with a small round bulb, is very commonly found in supermarkets and seems to be a basic kitchen item along with yellow onions, roots and tubers, tomatoes and green peppers. All of the tomatoes offered in the supermarkets, both island-produced and imported, were table varieties. No roma or saladette-types were offered in any of the supermarkets in Guadeloupe on the day that they were surveyed.

Sauces, Seasonings and Preserves

The section for sauces, seasonings and other condiments found in the supermarkets is distinctly different from that of those in other islands. The vast majority of the sauces and seasonings were mustard-based, a very distinct difference from the other islands and predictable considering the importance of mustard in French cuisine and agriculture.

However, there were a few hot sauces to be found in all stores, although usually only one or two brands and usually not the same brands in different stores. The Match in Baie Mahault had the largest selection of the three stores surveyed for hot sauces, with some four brands. Brands that were found were: Salsita hot sauce, Louisiana hot sauce (made in Canada!), Pimentine Creole Foods hot sauce, Tabasco sauce (bottled and distributed out of France) and the Marchande D'Epice's Sauce Piquante à la Creole and Sauce Extra Forte.

No green sauces, amchars, chutneys or other spicy pickled tropical fruits were found. The only other "exotic" tropical sauce found was fish sauce (probably Thai or Vietnamese).

As the public market visited in Point-à-Pitre was strictly a fresh product market, no cottage industry level sauces or seasonings were found there. However, there were a number of vendors offering hot chilies, usually scotch bonnet. Given the presence of the fresh hot chilies, it is not unlikely that Caribbean style hot sauces and jerks are offered in the less formal public markets. However, as the younger generation becomes more and more oriented towards the large supermarkets and the French imports offered therein, there will be less and less demand for the Caribbean style sauces, jerks and hot sauce products in the future, unless interest in them is revived by heavily promoting them in the way that they have been in the US in recent years.

Almost all of the jellies and jams found in the supermarkets were European (English, German and French) and American and mostly consisting of temperate climate fruit flavors such as blueberry, strawberry, raspberry. The Match supermarket in Baie Mahault did have two brands, M'Amour and Royal that offered such tropical flavors as guava, mango, tamarind and lime. A third brand that appeared to be local, Confiture Bonne Mamman, was available in more than one store surveyed but had non-tropical flavors such as blueberry. When tropical flavors were available, the most often seen fruit flavorings were guava and mango.

LUMBER AND WOOD PRODUCTS

No reliable, current figures are readily available on the production or import of wood and wood products for Guadeloupe. Guadeloupe is not a member of the International Tropical Timber Organization so they cannot provide any information on this subject. FAOSTAT database figures seem to stop changing after 1995 for most categories of wood products for both production and imports, indicating a loss of collaboration or record keeping by one or both parties. Given the resulting 7-year knowledge gap on the trend of wood use in Guadeloupe, it would be difficult to predict with certainty in what direction and with what magnitude wood import volumes and value have gone during the last few years or what the current levels of wood use are nor which wood species or wood products are most popular. These figures may be available from the Direction des Douanes et Droits Indirects. However, most of the imported woods are from Brazil, French Guyana, France and the US.

Apparently, in both Guadeloupe and Martinique there is demand for homes constructed in the traditional island style, which is basically a wooden structure. There are a number of building constructors who advertise not only “construction Antillaise” or “traditionnelle” but kit models in those styles as well.

A list of ten homebuilders that advertise building wood homes or with wood is provided in Annex III. Inquiries should be made to identify their suppliers as well as the woods being used. It would be worthwhile to promote some of the nontraditional tropical hardwoods to these builders and their suppliers.

Also, there are a number of sawmill/kiln-drying/carpentry operations that import both pine and hardwoods to transform into dried, treated sawn wood and wood products such as molding, staircases and other items. Some of these import wood, transform it and then export the finished products to French Guyana, St. Martin, Martinique, St. Barthélemy and St. Kitts and Nevis. A list of these carpenter/sawmill wholesale/retailers is provided in Annex III.

There are a number of companies that do import, wholesale, retail and re-export tropical hardwoods. Some of those are in or near ZI Jarry in the port area near the World Trade Center. In Annex III there is a list of a number of companies that advertise themselves as being wholesalers, retailers or distributors of exotic wood building materials.

IMPORT REGULATIONS AND REQUIREMENTS

Because Guadeloupe is a Department of France and, therefore, part of the EU, both French and EU standards and regulations controlling plant and animal health, product quality, processing, food safety, packaging and labeling apply to exports to Guadeloupe from Guyana. The regulations and requirements of both France and the EU concerning the quality and health standards as well as the requirements for the processing and packaging of fresh and frozen meats, fish, seafood and other processed meat products are strict. Additionally, it is a requirement of the EU that meat, fish and seafood consumed in the EU member states, and therefore France and Guadeloupe, be processed in EU certified processing facilities. As meat products from Guyana, do not meet the minimum requirements, they are prohibited for import into Guadeloupe.

Some fresh fruits and vegetables are allowed into Guadeloupe from Guyana. All imports of fruits and vegetables must meet the quality standards and minimum allowable pesticide residue requirements of the EU as well as specific phytosanitary restrictions and requirements. Information concerning the minimum pesticide residue tolerances for the EU can be found at www.coleacp.com.

Common quality standards for EU members are regulated by EEC No. 234/68 of the Council of 27 February 1968 and may be found on the European Union’s official website <http://www.europa.eu.int/eur-lex> or www.marketag.com/markets/eu/standards.

According to the Service de la Protection des Vegetaux of the Direction de l'Agriculture et de la Forêt de Guadeloupe, there is a specific ban on the import of plantains from Guyana but not for pineapples, limes, watermelons or papaya. Nor are there any restrictions against the import of the roots and tubers although there is a minimum requirement that the root crops be clean of soil. A phytosanitary certificate is required for all fruits and vegetables. As of July 3, 2002, there is a new requirement that for citrus crops, a supplementary declaration must be made in the phytosanitary certificate attesting that the country of origin be free of *Xanthomonas axoropodis* f. sp. *Citri* and of *Deuterophoma tracheiphilia*.

Labeling requirements for imports into Guadeloupe are governed by EU Directive 79/112 of the Council of 18 December 1978 and later amendments to that directive. This regulation requires that the label be in the language of the nation where it is to be sold and that the label provides information on the ingredients (in descending order of % content), net quantity of product (in metric units), the expiration date, usage and care instructions, name of the producer, manufacturer and/or distributor, country of origin and lot number.

CUSTOMS DUTIES AND DOCUMENTARY REQUIREMENTS

As Guyana and Guadeloupe are both members of the ACP (African, Caribbean and Pacific), when a EUR 1 circulation certificate is provided with the shipment, the Guyanese products will be exonerated of the general Customs Tax. However, the Octroi de Mer Tax (OM), Additional Tax to the Octroi de Mer Tax (DAOM) and VAT are still applied. These taxes are levied on a product-by-product basis so it is necessary to inquire as to the rates before shipping new products. A list of the taxes for some fruits and vegetables is provided in Annex V.

Taxes for wood and wood products are levied by wood species, dimensions and degree of finishing and it is necessary to provide all such relevant information to the Direction Regional des Douanes ("Customs") de Guadeloupe when making inquiries as to the tax rates for these products. Nevertheless, wood is subject to tax rates of 0-7% for the general Custom's Tax, 2-15% for the OM, 2.5% for the DAOM and 8.5% for the VAT. However, some wood and wood products are VAT exempt.

Import duties are calculated on the ad valorem basis of the shipment. This is the transaction value plus freight, insurance, commission and all other charges and expenses incurred in the sale and delivery of the goods to the point of entry into Guadeloupe. Usually, the value of the goods that is on the commercial invoice is accepted as the transaction value so long as there is no relation between buyer and seller. However, Customs may choose to use one of four other means of valuing the goods imported if it is not in agreement with the value provided on the invoice (CBATO report: Guadeloupe & Martinique, Export Guide to the Consumer Food Market, September 1997).

Documents required by the Customs Service for imports include:

- Bill of lading or Airway bill
- Commercial invoice
- Certificate of origin
- EUR 1 circulation certificate (for exemption of certain taxes as ACP member)
- Phytosanitary, fumigation or disinfection, zoosanitary certificate, as appropriate

Because the regulations controlling agricultural imports are complicated, I would recommend that the exporter inquire as to what documents are required of the importer in Guadeloupe well before consolidation of the first shipment.

CHALLENGES AND OPPORTUNITIES

RED MEATS AND FISH & SEAFOOD

Challenges

Red meats and fish & seafood to Guadeloupe are banned from import from Guyana. The Veterinarian Service very emphatically stated that all meat products: fish, seafood and red meats; are prohibited entry from Guyana. The first challenge to exporting to Guadeloupe would be to change this status.

There are three forces that could act to resist a change in the status of this ban: consumer requirements, market requirements and governmental requirements. These act together to create a number of obstacles to meat imports from Guyana at the present time.

First, as discussed earlier, there are a number of strict zoosanitary and food safety regulations and requirements for meat imports into France and the EU that act as shields from imports from countries with less highly developed food safety and product quality programs. For more information on these rules, refer to the Food Safety and Inspection Service of the US Department of Agriculture and the Codex Alimentarius (See Annex IV: Useful Websites). These can be fallen back on for protection from imports. However, if the consumers are concerned about food safety and the domestic producers fear an epidemic from imports of disease contaminated meat products, then the two parties are within their rights to insist that their government protect them from of imports of unhealthy or diseased food products. The responsibility is therefore upon the exporter to overcome objections by raising the level of their animal health and food safety standards at home.

A second source of resistance to imports will be the brand loyalty of consumers and butchers in Guadeloupe, which are accustomed to French sources of the red meats and therefore certain cuts of different meats. Meat processors in Guyana will have to work with the importers in Guadeloupe to produce meats that have a taste and appearance to which the consumer and butchers, are accustomed.

The third challenge to red meat exporters will be one of choosing a winning market entrance strategy. How receptive will the importers and wholesalers be to a new supplier when they have long-time relationships with French, European and US meat providers? What will have to be done by the exporter to overcome the natural resistance of buyers to changing suppliers? Identification and implementation of a strategy to overcome these obstacles at entry will require consulting and negotiation with potential clients in Guadeloupe.

Finally, for both red meat and the fish and seafood processors there may be the obstacle of the possible exports of these same products, now or in the future, from Guadeloupe to France and the EU. To illustrate this, I would like to relate the comments of the Health Officer in St. Maarten concerning the status of imports of fish & seafood from Guyana. He stated that at the current time there are no restrictions against imports of fish & seafood from Guyana. However, St. Maarten fish processing facilities are currently working on being certified by the EU and if they were successful in doing so, then St. Maarten would probably ban imports of fish & seafood from Guyana. This would be necessary to prevent the intentional or accidental mingling of St. Maarten's EU-certified domestic product with non-EU-certified Guyanese imports. Discovery of intermingling of these two products in EU-bound exports from St. Maarten might result in the loss of the St. Maarten processor's certification. To avoid this risk, it would be prudent to ban any imports of fish & seafood from countries without EU-certified processors, which would include Guyana. This might also prove to be the case in Guadeloupe as well. Only EU-certification of the Guyanese product would obviate such an eventuality.

In the case of beef there is the additional obstacle from consumers in the EU, particularly in France. As a result of the recent panic in the EU, particularly in France, over bovine spongiform encephalopathy, there will be resistance on the part of EU consumers to receiving beef from foreign sources and suppliers will be very sensitive to this issue.

Opportunities

What are the opportunities for meat exports to Guadeloupe? First, if production and processing of the red meats and processing of the fish & seafood were EU certified, then they would have to be accepted by the Guadeloupe government as safe for human consumption. If Guadeloupe were to also be EU-certified, then Guyanese processing facilities and both the fishing and animal production communities would benefit considerably not only by having access to the large regional market of Guadeloupe, but also to the much larger market in the EU through additional processing and/or re-packing at processors in Guadeloupe who would already have contacts in the EU market.

A second opportunity is one that could benefit the small livestock producers in Guyana. The diet of the people of Guadeloupe and France is more varied in some respects and includes a number of different meats that are easily grown in limited space and which have a high annual turnover rate: rabbit, goat, veal and duck, for example. This would present an opportunity to small growers with limited space and financial resources who need a quick turn-around in their investment.

As noted in the section on domestic production of red meats, the level of local production in 2000 was not sufficient to supply the demand for goat meat in Guadeloupe. It is unlikely that situation has changed and this provides an opportunity for goat breeders, herders and meat processors in Guyana to provide goat meat, if they could get permission to export to Guadeloupe.

Recommendations for Action

The first step would be to inquire as to the specific objections for each product. In the case of red meats, both zoosanitary and food safety in the processing stage have been cited as reasons for banning Guyanese products.

Next, the objections should be analyzed for points where Guyanese producers can make a change in their production or processing activities to meet the requirements of Guadeloupe. In any case, at a minimum the processing facilities must be EU-certified.

Third, a feasibility study should be made to analyze the cost to make the needed changes and possible profitability of such a venture and whether there would be sufficient product to make the project possible to determine whether this market would be serviceable. Also, this should be compared with the results of similar studies for other markets to determine what the best market alternative would be to avoid wasting scarce resources on markets with lower returns.

If it is determined that exports of meats to Guadeloupe would be practical, feasible and profitable, representatives of the GOG should negotiate with the government of Guadeloupe and its Ministry of Agriculture and Forestry for the certification of specific slaughterhouses and fish processing plants in Guyana, so that they meet the sanitary and food safety requirements of Guadeloupe, France and the EU.

FRUITS AND VEGETABLES

Challenges

At the present time, it seems that the most serious challenges to imports of f&v will be to determine whether the Guyanese farmers can acquire seed for and produce these varieties with which they are unfamiliar and whether the exporters can spot sales opportunities for familiar products and consolidate large enough volumes to ship on a regular basis to this market. If those could be overcome, the Guyanese exporters will have to work on convincing the buyers and wholesalers in Guadeloupe to take them on as new suppliers.

The Ministry of Agriculture and Forests is promoting an agriculture diversification program for both import substitutes and exports to the EU. Any products imported from Guyana that prove to represent a real threat to the success of some part of that program stand the risk of experiencing increased regulation.

A possible future challenge may be that of European supermarkets requiring Eurogap certification of fresh produce. This is a recommendation of the European Retailer Working Group, not a EU regulation (yet), which would require exporters to provide traceability of wash water analysis and documentation for legal permission to grow biotech foods (probably not an issue for Guyana at this time). The danger of this initiative is that it represents yet another potential non-tariff barrier to use against imports of f&v by governments so inclined.

Opportunities

The good news is that many f&v that are grown in Guyana are admissible into Guadeloupe and as a result of being a member of the ACP, they are exempt from general Customs taxes, which gives them an edge with low tax cost over non-ACP competitors. Unfortunately, other taxes, the OM and DAOM, are levied on f&v from Guadeloupe but are not levied on French, EU and Guadeloupean products, giving the latter competing countries a tax cost advantage over Guyana. Identification of the more competitive products, based on an analysis the effects of these taxes on net income, is needed to develop product mixes that will optimize profitability on a per shipment basis.

The Produce Marketing Association (PMA) recently reported that organic juice market in Europe is growing rapidly and projected to reach \$90 million in 2002. They quote the results of a study by the Organic Monitor that showed that the market had been growing 20% per year since 1998. One of the largest segments was orange juice. Organic vegetable juice has not experienced the same growth rate as organic vegetable juice is less popular than organic fruit juice, but the segment is expected to show higher growth than for the organic fruit juices in the future (PMA's Freshline This Week in Produce, November 20,2002).

Guadeloupe has contacts with the juice industry in EU and has processing plants that make juices. Guyana is in the process of developing an industry for organic agricultural production. An interesting opportunity may be in the formation of a venture in which Guyanese producers supply the organic fruits and vegetables to an organic juice processor in Guadeloupe for processing and bottling for the European market. If a European organic beverage processor and distributor were drawn in for technical assistance and marketing of the products, the project would be much more likely to prosper and grow quickly. It should be noted, however, that the announcement by Trinidad (TT) of its intention to become the organic producer of the Caribbean represents a threat of losing this opportunity as TT has the ability to move more quickly than Guyana to take advantage of this opportunity.

While there seems to have been previous attempts by various producers/exporters to supply Guadeloupe, I did not see any evidence of that in the supermarkets. However, it

may be that Guyanese produce could be imported to smaller local independent wholesalers who might add the Guyanese products to their existing product line and wholesale Guyanese products around the island in the public markets.

There is a list of the average prices paid to farmers in markets for selected products in Annex I.

Recommendations

From the point of view of developing a market (Guadeloupe) and considering the Guyanese f&v industry as a business enterprise and given the circumstances (i.e., the situation of a business that lacks the strength to compete strongly in a very desirable “new” market); the question is whether one would choose to: (1) fall back temporarily and hold on to the markets where one already has some market share (Barbados and Antigua for example) and work on market penetration and expanding sales in those markets while concentrating investment in developing production capacity, business skills and improving product quality or (2) jump into a very demanding, formal and highly regulated market forcing, risking the eventual necessity of beating a hasty retreat, possibly leaving behind a poor image in the marketplace with which to struggle in the future.

Given all of these conditions, it would be recommended that Guyanese f&v exporters concentrate on option 1 until confident of having acquired the strength as a business to move into Guadeloupe successfully.

However, market strategy is one thing and sales are another. There may be opportunities on the public market through small independent wholesalers. Using freight forwarders and customs brokers one might deliver product to those small wholesalers. However, before venturing into this market, two analyses must be made.

First, a cost-return analysis should be made, product-by-product, to determine whether prices paid on this level of market, the volume of product than might be sold and the total cost for delivery (including cost, freight, insurance, commissions, taxes, drayage, incidental miscellaneous costs and Customs fees) will allow a comfortable profit.

Second, it must be determined how this product can be delivered to Guadeloupe, how long the trip will be and how often product may be sent and whether the wholesaler on the receiving end feels that the volume, quality and frequency of delivery will be sufficient for his needs.

Additionally, Guyanese exporters should examine the credit rating or business standing in the community of their prospective Guadeloupean buyer. Businesses must register with and be a member of the *Chambre de Commerce et D’Industrie* (Chamber of Commerce and Industry). The Chamber should be able to provide company background on any legally registered enterprise. *Le Greffe du Tribunal de Commerce* (Clerk of Court) provides information on the legal standing of businesses and can report complaints about

them. Also, Dunn and Bradstreet-France can provide a credit rating for those companies formed in France and with a sufficiently high capitalization.

Another alternative that is beyond the reach of a small enterprise but which might be possible for a medium sized enterprise would be to start up a joint venture in Guadeloupe with an existing marketer in Guadeloupe as a partner and feed product to the French business partner through the new company. The advantages of this are that as a Guadeloupean business, the enterprise has access to financial and informational support that can be used to improve the business as a whole and allow some of the benefits of this to flow back to the production and export part of the business. Also, having a Guadeloupean marketer on the team would open the door to the distribution channel.

LUMBER AND WOOD PRODUCTS

Challenges

Two competitors with probably the same or nearly the same mix of products as could be offered out of Guyana, Brazil and French Guyana, are already in the market. Some companies that import and distribute wood from these sources seem to be linked to the source in some way, in some cases as a distributor or representative for a processor or perhaps as just a long-time business relationship. Some of the Guadeloupe distributors have buyers located in the supplying countries, such as Guyana, who arrange shipments of wood on an as-needed basis.

Opportunities and Recommendations

One of the reasons cited for the decline of the resort tourism trade in Guadeloupe is aging infrastructure. The government of France has announced its intention to make more investments in Guadeloupe, some of the funds of which will surely go to shore up the important but faltering tourism sector. An investment in the tourism industry should lead to investments in refurbishing and remodeling of existing hotels and in new structures. The developments surrounding this large public spending investment should be monitored closely to determine what projects will be funded and what and when opportunities might present themselves for supplying **construction materials and room furnishings to resorts**. To be current as to developments as they unfold and to know when opportunities are about to open up and for Guyanese producers and manufacturers to participate as suppliers, because Guadeloupean and French manufacturers and producers will undoubtedly be the preferred direct suppliers to government spending projects, Guadeloupean intermediaries would be required, perhaps as buyers or in a joint ventures.

In order to take advantage of the opportunities that may arise, some research should be made now as to the current trends in European lodging furnishing styles to try to develop furniture designs that would be attractive and well priced for this trade. Promotion will be necessary to attract co-investors or buyers.

The Convention on International Trade in Endangered Species Wild Fauna and Flora (CITES) recently decided to place mahogany (*Swietenia macrophylla*) on the CITES endangered species list and to require governments to ensure that exports are sustainable and have a CITES export permit (except for Indonesia and Malaysia where this specie was introduced for commercial production and is not a native tree) (CITES Amendment to Appendices I and II of the Convention, November 2002). This decision goes into full effect as of November 2003 (12 months after the decision). Hopefully it will serve to slow cutting of mahogany. This should increase the demand for other attractive woods with characteristics similar to mahogany (colour, hardness, insect and rot resistance) and with good working qualities, particularly for the furniture manufacturing industry. Fine homebuilding, the furniture and cabinetry trade and hardware stores with a line of building supplies for repairs and maintenance of wooden homes are opportunities for lumber and value-added wood products from Guyana. A suggestion would be to contact the associations of building constructors and furniture and cabinetry manufacturers to promote the Guyanese non-traditional tropical hardwoods as replacements to mahogany.

A promotional tour targeting these two groups of manufacturers of wood products could be arranged through the Chamber of Commerce and/or the World Trade Center, which has facilities for such a promotion. The promotion should include demonstrations of woodworking and displays of lumber of the different woods with applications of various finishes and end products made from the woods. Attractive promotional packages containing literature with information on the characteristics of the different woods and lists of suppliers in Guyana and small samples of the woods for later reference could be provided to potential buyers.

Didier Paulin works with the Chambre des Mètiers and a number of small carpenters and furniture makers in Roche Blanche. His own business, PEBOIS, produces a number of items but one that might be of particular interest is the coconut palm staircase that he has developed and for which he needs **coconut palm trunks**. He also works with PEBOIS for which he is looking a number of woods, including pine tongue and groove planks and paneling. Mr. Didier's credentials should be verified through the Chamber of Commerce and other sources.

ANNEX I

PRICES PAID TO FARMERS AND WHOLESALE AND RETAIL PRICES FOR FRUITS AND VEGETABLES IN GUADELOUPE

**TABLE 1. RETAIL PRICES FOR FRUITS AND VEGETABLES IN
SUPERMARKETS IN GUADELOUPE.**

(PRICES IN EU/KG)

| Product | Origin | Match | Gosier Leader Price | Destreland Carrefour | Baie Mahault Leader Price | Average (Euro/kg) | Average (US\$/kg) |
|----------------|------------|-------|---------------------------|-------------------------|------------------------------------|----------------------|----------------------|
| Green peppers | Dutch | 5.90 | | 5.78 | | 5.84 | 5.83 |
| | local | 3.64 | | 3.80 | 3.77 | 3.74 | 3.73 |
| Christophene | Guadeloupe | 2.85 | 2.68 | 1.70 | | 2.41 | 2.40 |
| Okra | | 3.03 | 3.91 | 3.80 | | 3.58 | 3.57 |
| Sweet potatoes | Guadeloupe | 1.83 | | 2.28 | 2.05 | 2.05 | 2.05 |
| Coconuts | | 2.74 | | | | 2.74 | 2.73 |
| Ginger | | 6.40 | | 6.68 | | 6.54 | 6.52 |
| Avocado | | 2.74 | | 3.50 | | 3.12 | 3.11 |
| Pineapples | Guadeloupe | 2.12 | | 2.27 | | 2.20 | 2.19 |
| Limes | | 1.25 | | 0.98 | 0.90 | 1.04 | 1.04 |
| Potatoes | | 0.83 | | 4.49 | 1.06 | 2.13 | 2.12 |
| Cucumbers | Guadeloupe | 1.14 | 0.88 | | | 1.01 | 1.01 |
| Tomatoes | Guadeloupe | | | 2.88 | 2.83 | 2.86 | 2.85 |
| Eggplant | Guadeloupe | | | 1.51 | 1.46 | 1.49 | 1.48 |
| Onions | | 1.35 | | 4.24 | 1.36 | 2.32 | 2.31 |
| Plantains | | | 1.15 | | | 1.15 | 1.15 |
| Dasheen | Guadeloupe | | 1.49 | | | 1.49 | 1.49 |
| Shallots | | | 6.96 | | | 6.96 | 6.94 |
| Passion fruit | | | 3.30 | | | 3.30 | 3.29 |
| Pumpkin | Guadeloupe | | | 2.58 | 2.05 | 2.32 | 2.31 |
| Carambola | Guadeloupe | | | 3.03 | | 3.03 | 3.02 |
| Mango | | | | 2.58 | | 2.58 | 2.57 |
| Igname | Costa Rica | | | 2.27 | 1.95 | 2.11 | 2.10 |
| Malanga | | | | 3.03 | | 3.03 | 3.02 |

Exchange rate US\$ 0.9975= 1 Euro.

TABLE 2. AVERAGE PRICE PAID TO PRODUCER BY TYPE OF BUYER FOR THE YEAR 2001. PRICES IN EU/100 KG.

| Product | Market (E/100 kg) | Export (E/100 kg) | Market (E/kg) | Export (E/kg) | Market (US\$/kg) | Export (US\$/kg) |
|-------------------|------------------------------|------------------------------|--------------------------|--------------------------|-----------------------------|-----------------------------|
| Melon | 47.00 | 135.00 | 0.47 | 1.35 | 0.47 | 1.35 |
| Onion | 91.47 | | 0.91 | - | 0.91 | - |
| Watermelon | 91.47 | | 0.91 | - | 0.91 | - |
| Parsley | 1,372.00 | | 13.72 | - | 13.69 | - |
| Peas | | | - | - | - | - |
| Tomato | 452.45 | | 4.52 | - | 4.51 | - |
| Lettuce | 182.94 | | 1.83 | - | 1.82 | - |
| Igname | 152.45 | 152.45 | 1.52 | 1.52 | 1.52 | 1.52 |
| Madere | 137.20 | 137.20 | 1.37 | 1.37 | 1.37 | 1.37 |
| Malanga | 152.45 | 152.45 | 1.52 | 1.52 | 1.52 | 1.52 |
| Cassava | 53.36 | 53.36 | 0.53 | 0.53 | 0.53 | 0.53 |
| Sweet Potato | 106.71 | 106.71 | 1.07 | 1.07 | 1.06 | 1.06 |
| Potato | 152.45 | 152.45 | 1.52 | 1.52 | 1.52 | 1.52 |
| Coconut | 30.49 | 30.49 | 0.30 | 0.30 | 0.30 | 0.30 |
| Orange | 121.96 | 75.00 | 1.22 | 0.75 | 1.22 | 0.75 |
| Mandarine | 152.00 | | 1.52 | - | 1.52 | - |
| Grapefruit | 64.00 | | 0.64 | - | 0.64 | - |
| Limes, Bears | 157.69 | | 1.58 | - | 1.57 | - |
| Limes, Antillaise | 173.79 | | 1.74 | - | 1.73 | - |
| Pineapple | 83.85 | | 0.84 | - | 0.84 | - |
| Grenadille | 146.40 | | 1.46 | - | 1.46 | - |

Exchange rate used is US\$0.9975= 1Euro.

TABLE 3 . RETAIL PRICES FOR SELECTED MEATS IN SUPERMARKETS IN GUADELOUPE, SEPTEMBER 2002. PRICES PAID IN EURO/KG.

| Product | Cut/ Prep | Source | Destreland Carrefour | Baie Mahault MATCH | Gosier Leader Price | Average (Euro/kg) | Average (US\$/kg) |
|---------------------------|----------------------|---------------|---------------------------------|-------------------------------|------------------------------------|------------------------------|------------------------------|
| Fish & Seafood | | | | | | | |
| Vivaneu | fresh, plank | | 19.00 | | | 19.00 | 18.95 |
| Moreau | dried | | 8.50 | | | 8.50 | 8.48 |
| Crevettes | 80-100 ct | Fr. Guyana | 12.90 | | 16.74 | 14.82 | 14.78 |
| Seabob | med, frz | | 7.00 | 9.75 | | 8.38 | 8.35 |
| Vivaneu rouge | frozen (frz) | VZ-CODEPEG | 7.99 | 9.13 | 8.35 | 8.49 | 8.47 |
| Sardines | whole, frz | | 3.64 | 4.10 | | 3.87 | 3.86 |
| Mackerel | frz | | | 3.20 | 2.98 | 3.09 | 3.08 |
| Dorado | slice, frz | | | 6.08 | | 6.08 | 6.06 |
| Beef | | | | | | | |
| Coti | plank | | 19.00 | 16.74 | | 17.87 | 17.83 |
| Basse-cote | | | 10.65 | | | 10.65 | 10.62 |
| pot au feu | | | 6.85 | | | 6.85 | 6.83 |
| Entre cote | | | | 18.25 | | 18.25 | 18.20 |
| Beefsteak | plank | | 16.75 | 16.01 | | 16.38 | 16.34 |
| Liver | | | | 3.35 | | 3.35 | 3.34 |
| Kidney | | | | 3.13 | | 3.13 | 3.12 |
| Lamb | | | | | | | |
| cote filet (chop) | fresh | | 19.00 | | | 19.00 | 18.95 |
| epaule | semi-dess. | | 12.00 | | | 12.00 | 11.97 |
| selle avec 05 | fresh | | 14.00 | | | 14.00 | 13.97 |
| cote d'agneau | frz | | | | 9.56 | 9.56 | 9.54 |

Exchange rate: US\$ 0.9975= 1 Euro.

ANNEX II

**TABLE I. SUPERMARKETS AND HYPERMARKETS
ON GUADELOUPE**

| NAME OF SUPERMARKET | NUMBER OF OUTLETS |
|-------------------------------------|------------------------------|
| Azur Caraïbes | 1 |
| Hypermarché Carrefour | 2 |
| Supermarché Biché | 2 |
| Cora | 4 |
| ECOMAX | 15 |
| Marché Conseil | 1 |
| Match | 7 |
| Raidis | 1 |
| Simon Romould | 5 |
| SODIGUA 2000 | 1 |
| Supermarché Champion | 1 |
| Leader Price | 7 |
| Primestères Renoird | 4 |
| SCI Destrellan | 1 |
| Centrale de Distribution | 2 |
| Discount Outre-Mer (DOM) | 1 |
| SOCARDIS | 1 |
| SODIMAR 2000 | 1 |

TABLE 2. DISTRIBUTORS AND WHOLESALERS OF FOOD PRODUCTS ON GUADELOUPE.

| Name | Product | Source | Activity | Yr Est. | Affiliation | Contact name | Tel No. | Fax No.* |
|--|----------------------|-----------------------------|-----------------------|----------------|-------------------------------|---------------------------|----------------|-----------------|
| Destrellan, SA | all | EU, US, CA, NZ, Asia, Carib | distrib | | Groupe G. Hayot Despointes | Guillaume de Reynal | 26-10-10 | 26-14-78 |
| Primestères Reynoird | all | FR | distrib | | | Henri Fauré | 26-66-88 | 26-84-27 |
| SOPRI | foods | US, VZ, FR | distrib | 1980 | Groupe Hayot | Roger de Virginie | 26-45-29 | 26-45-54 |
| Compagnie Caraïbe | food products | EU | Whlsl, distrib | 1956 | | Amédé Aubery | 82-81-41 | 83-00-24 |
| Comptoir Commercial Caraïbe | food products | US, EU, NZ, SA, Asia | whlsl | 1980 | Groupe Bichara | Franklin Bichara | 26-72-31 | 26-72-83 |
| Netter St. Martin | conserve f&v | FR, GD, PR | whlsl | 1990 | | Marc Cheriaux | 87-51-02 | 87-92-99 |
| Primantilles | f&v, dairy, meats | FR | whlsl, import, export | 1986 | | Mdme Jocelyn Duret | 26-56-20 | 26-28-01 |
| SODIAL NOUY | food products | EU, US, CA | whlsl | 1977 | | Pierre Noirtin | 26-69-08 | 26-87-06 |
| SOFRIBER (Société Frigorifique de Bergevin) | fresh veg | FR, EU, US | distrib | | Groupe G. Huyghues Despointes | André Walle-Clerc | | 26-90-63 |
| SOCREMA | Fruit, milk products | FR, SA | whlsl | 1973 | Groupe G. Huyghues Despointes | Michel Bonnot | 26-60-70 | 26-63-59 |
| Barbotteau Distribution | Food products | FR | whlsl | 1996 | Groupe Barbotteau | Jean Pierre Barbotteau | 26-73-41 | 26-68-89 |
| Boureau Distribution | basic foods | FR, EU | whlsl | 1986 | | Alain Boureau | 26-64-58 | 26-81-55 |
| SOFRIGEL | frozen food products | FR, EU, NZ, Fr. Guyana | whlsl | 1988 | Groupe Barbotteau | Alain Mees, Patrick Bunel | 26-72-59 | 26-87-01 |
| CADI Surgeles | Frozen, chilled | FR (80%), SA, Carib | whsl | 1981 | | Gaëtan de Reynal | 26-87-22 | 26-88-92 |
| GUADALIM | foods | FR, TH, EU | whlsl | 1996 | | Phillipe Mallelec | 26-94-94 | 26-65-25 |
| Epervier SARL | veg | US, others | whsl | | | Edmond Damator | | 20-17-39 |
| SOFROI Multicash | foods | worldwide | whlsl | 1969 | Groupe G. Huyghues Despointes | Phillipe Chapron | 83-17-94 | 20-30-30 |

All telephone and fax numbers are preceded by the code 0590.

TABLE 3. AGRO MANUFACTURERS ON GUADELOUPE

| Name | Products Mfd. | Products Imported | Suppliers | Year Est. | Contact | Tel. No.* | Fax No.* |
|-------------------------------|--|----------------------------|----------------------------------|------------------|------------------------|------------------|-----------------|
| COFRALIM | Cold cuts | Pork, beef, lamb and veal | FR | 1994 | Gilles Duret | 26-51-91 | 26-33-39 |
| COROJA JUS ANTILLAIS | Fruit juice | Sugar, bottles | FR (fruit presumable Guadeloupe) | 1982 | Jean-Claude Boecasse | 26-78-10 | 26-91-05 |
| International Foods | Retail | Frozen fish & seafood | US, Peru, CR, TR, JM | 1992 | Mdme Magda Huivandamme | 87-85-28 | 87-80-38 |
| Jus de Fruits Caraïbes | Fruit juice | Fruit | FR, VZ | 1983 | Didier Aubery | 26-73-25 | 26-70-13 |
| La Piquante Creole | Seasonings & sauces | Ingredients | FR | 1995 | Thierry Patte | 24-65-95 | 24-83-48 |
| Les Oliviers | Preparation & re-packaging of frozen meats | Meat, fish, prepared meals | | 1989 | Christian Tondu | 26-87-22 | 26-88-92 |
| SOPROGEL | As above | Frozen meat & fish | FR, NZ, EU | 1991 | Patrick Bunel | 38-33-33 | 26-87-01 |

All telephone and fax numbers are preceded by the code 0590.

Source: Annuaire Guadeloupe Import/Export, 1999.

Abbreviations used:

CA: Canada

FR: France

US: United States

CR: Cost Rica

TR: Trinidad

JM: Jamaica

VZ: Venezuela

NZ: New Zealand

EU: European Union

TH: Thailand

SA: South America

PR: Puerto Rico

GD: Guadeloupe

Carib: Caribbean region

Fr. Guyana: French Guyana

ANNEX III

TABLE 1. BUILDERS OF WOOD STRUCTURE HOMES.

| COMPANY NAME | ADDRESS | TELEPHONE No. | FAX No. |
|---|--|----------------------|----------------|
| Antilles Structures Bois et Bèton | 11 Rte Grand Champ Rocade, Abymes | 0590-82-36-11 | 0590-82-28-11 |
| Maisons Kazeco | Villa Terrain Rocade Grand Champ, Abymes | 0590-21-44-74 | 0590-91-29-62 |
| Bourbon Bois | Blvd. De Houelbourg ZI Jarry, Immeuble Sinkel 97122 Baie Mahault | 0590-38-00-44 | |
| (CTG) Construction Traditionnelle Guadeloupéenne | 36 Rue Ferdinand Forest ZI Jarry 97122 Baie Mahault | 0590-25-24-17 | |
| Groupe Le Villain Antilles | Rue Becquerel ZI Jarry 97122 Baie Mahault | 0590-26-59-58/9 | |
| Ideal Construction | Blvd Marquisat de Houelbourg No. 29 Le Patio ZI Jarry 97122 B. M. | 0590-26-62-26 | 0590-26-65-75 |
| Société Construction des Antilles (SCA) | 19 Rue Industrie ZI Jarry 97122 B. M. | 0590-26-90-31 | 0590-26-88-15 |
| H. V. Batiments Maison Caraïbes | 41 Morne Ninine La Marina 97190 Gosier | 0590-90-92-92 | 0590-90-99-49 |
| Société de Construction Antillaise (SODECO) | No. 19 Immeuble Shopping Center Raizet 97139 Abymes | 0590-83-08-99 | 0590-91-19-06 |
| Société Nouvelles U.T. B. | Trois Chemins de Brageloge 97118 Saint Françoise | 0590-88-47-09 | 0590-88-78-08 |

TABLE 2. INDUSTRIAL WOOD PROCESSORS ON GUADELOUPE.

| NAME | Compagnie des Bois Tropicaux | Comptoir du Bois | TechnoBois & Industries du Bois * | PROBOIS | Caraïbe Charpente Plus | PEBOIS S. A. Cob * |
|-------------------------|-------------------------------------|--|--|--|---|--|
| ADDRESS | Rougeole 97170 Petit-Bourg | Rue Alfred Lumière, ZI Jarry 97122 B. M. | 4, Lot Caraïbes Centre ZAC de Moudong 97122 BM | Section Vichard, 97124 Lamentin | Lot 4, Rue Ferdinand Forest ZI Jarry 97122 BM | Roche Blanche 97179 Petit-Bourg (PEBOIS) (COB: Imp Fresnel 97122 ZI Jarry B.M.) |
| CONTACT | Christian Crouzillac | Pierre Davesis | Pascal Conche | Jean Marie Chaloin | Jean Claude Bernari | Didier Paulin |
| PRODUCT | Sawmill work and marketing | Sales of wood & construction materials | Carpentry and interior- exterior woodwork | Distributor of woods | Industrial and traditional carpentry | Wooden structures, furniture |
| IMPORT | Wood, treated pine | Woods | Woods | Woods | Wood, hardware | |
| SOURCE | Fr. Guyana, Brazil | FR, US, Brazil | Fr. Guyana | Brazil | France | |
| Export to | Antilles | Saint Martin | St. Kitts and Nevis | No | No | |
| Year Established | 1990 | 1990 | 1989 | 1989 | 1996 | |
| Other inform. | Member AMPI | | | | Member AMPI | www.pebois.com cob.sa@wnadadoo.fr |
| Telephone | 0590-95-40- 92 | 0590-26- 78-27 | 0590-32-08- 38 | 0590-25- 32-39 | 0590-38- 00-61 | 0590-94-29-81 (COB: 26-14-01) |
| Fax | 0590-95-62- 89 | 0590-26- 75-60 | 0590-32-07- 96 | 0590-25- 32-25 | 0590-26- 75-96 | 0590-94-31-29 (COB: 26-57-25) |

- Two companies listed under same address and name.
- Source: Annuaire Guadeloupe Import/Export, 1999, pp. 187-194.

TABLE 3. DISTRIBUTORS, WHOLESALERS AND RETAILERS OF EXOTIC WOOD BUILDING MATERIALS IN GUADELOUPE.

| COMPANY NAME | ADDRESS | TELEPHONE NO. | FAX NO. |
|-------------------------------|--|--------------------------------|--------------------------------|
| Chantiers Audebert, SA | ZI Jarry Rue Alfred Lumière Baie Mahault 97122 | 0590-26-76-40 | |
| Bois Tropical | Zone Artisanale Morin, St. Claude | 0590-80-07-80 | |
| Leader Mat | Rue Thomas Edison ZI Jarry Baie Mahault 97122 | 0590-32-64-80 | 590-26-74-02 |
| Locadress | 39 imm Romarin Ferdinand Baie Mahault | 0590-32-64-17 | 0590-32-63-25 |
| Maureaux Emmanuel ETS | Zona Artisanale Peres Blanc Bailiff | 0590-99-29-60 | |
| Socabois | Richeval 971111 Marne à l'Eau | 0590-24-62-90 | 0590-24-33-93 |
| Tropibois | Rue Thomas Edison ZI Jarry Baie Mahault 97122 | 0590-26-38-59 0590-26-42-17 | 0590-32-03-93 0590-33-25-86 |
| Scières Piveteau | Jaula Lamentin | 0590-28-22-16 | 0590-28-30-10 |

Source: Annuaire Guadeloupe Import/Export, 1999.

ANNEX IV

USEFUL SOURCES OF INFORMATION ON GUADELOUPE

AGENCIES, SERVICES

Chambre de Commerce et D'Industrie de Pointe à Pitre

Address: B. P. 64-97512 Pointe à Pitre

Telephone: 0590-93-76-00

Fax: 0590-90-21-87

Registration of Businesses

Chambre de Commerce et D'Industrie de Pointe à Pitre

Centre de Formalités des Entreprises

Address: Rue Félix Eboué 97519 Pointe à Pitre CEDEX

Telephone: 0590-93-76-74

Fax: 0590-93-76-78

(make an appointment)

Import Regulations

World Trade Center Pointe à Pitre

Address: ZI Jarry 97122 Baie Mahault

Telephone: 0590-25-26-00

Fax: 0590-25-26-06

<http://www.antilles-info-business.com/guadeloupe>

Phytosanitary Service and Admissibility

Direction de l'Agriculture et de la Forêt

Service de la Protection des Végétaux

Address: Jardin d'Essais 97139 Abymes

Contact: Mr. Alain Chidiac

Position: Le Chef du Service

Telephone: 0590-99-09-09

Fax: 0590-99-09-10

Animal Health and Imports

Service Vétérinaires

Address: Jardin d'Essais 97139 Abymes

Telephone: 0590-26-68-94, 82-06-60

Fax: 0590-90-23-41

Quality Standards

Direction Départementale Concurrence Consommation et Repression des Fraudes

Address: Morne Vergain imm SODEGA

Telephone: 0590-21-38-21

Fax: 0590-90-28-95,0590-21-38-22

Customs Offices

Direction Regionale des Douanes de Guadeloupe

Address: Chemin du Stade 97109 Basse Terre

Contact: Mr. G. Plaideur

Telephone: 0590-25-18-30

Fax: 0590-25-18-30

Statistics on Imports

Institut National de la Statistique et des Etudes Economiques (INSEE)

Service Régional Guadeloupe

Direction des Douanes et Droits Indirects

Address: Avenue P. Lacavé B.P. 96, 97102 Basse-Terre CODEX

Telephone: 05.90.99.36.70

Email: www.insee.fr/□uadeloupe

WEBSITES

Chambre de Commerce et D'Industrie

www.pointe-a-pitre.cci.fr

Association of Exporters of Guadeloupe

www.guadexport.com

International Freight

www.freightmarket.com

The European Union online

www.europa.eu.fr

Secretary of State to the Outre-Mer

www.outre-mer.gouv.fr

Ministry of Economy and Finance

www.finances.gouv.fr

Food and Safety and Inspection Service Export Library

U. S. Department of Agriculture

www.fsis.usda.gov/OFO/export/explib.htm

Codex Alimentarius
www.codexalimentarius.net

INSEE
www.insee.fr/fr/uadeloupe

ANNEX V

CUSTOMS TARIFFS, DUTIES AND TAXES FOR FRESH FRUIT AND VEGETABLE IMPORTS FROM GUYANA

| PRODUITS | ORIGINE | TEC | FORM A | EUR 1 | | | |
|--|---------|---------------------|--------|--------|-----|------|-------|
| | | DD | DR * | ACP | OM | DAOM | TVA |
| Patate douce | Guyana | 3% | Exempt | Exempt | 7% | 2,5% | 2,10% |
| Arachide | Guyana | Exempt | | Exempt | 7% | 2,5% | 2,10% |
| Aubergine | Guyana | 12,80% | 9,3% | Exempt | 10% | 2,5% | 2,10% |
| Christophine | Guyana | 14,4% | 10,9% | Exempt | 10% | 2,5% | 2,10% |
| Igname de Chine | Guyana | 9,5 euros/100kg net | | Exempt | 10% | 2,5% | 2,10% |
| Igname | Guyana | 9,5 euros/100kg net | | Exempt | 10% | 2,5% | 2,10% |
| Manioc | Guyana | 9,5euros/100kg net | | Exempt | 7% | 2,5% | 2,10% |
| Malanga | Guyana | 3% | Exempt | Exempt | 10% | 2,5% | 2,10% |
| Pastèque | Guyana | 8,8% | 5,3% | Exempt | 15% | 2,5% | 2,10% |
| Giromon | Guyana | 6,4% | | Exempt | 7% | 2,5% | 2,10% |
| Poivre de Cayenne Non broyé, ni pulvérisé | Guyana | Exempt | | Exempt | 7% | 2,5% | 2,10% |
| Poivre de Cayenne Broyé, pulvérisé | Guyana | 4% | Exempt | Exempt | 7% | 2,5% | 2,10% |
| Fruit de la passion | Guyana | Exempt | | Exempt | 7% | 2,5% | 2,10% |
| Ananas | Guyana | 5,8% | 2,3% | Exempt | 7% | 2,5% | 2,10% |
| Avocat | Guyana | 4% ou 5,1% | 1,6% | Exempt | 7% | 2,5% | 2,10% |
| Mangue | Guyana | Exempt | | Exempt | 7% | 2,5% | 2,10% |

| | | | | | | | |
|----------------|--------|--------------------------|-----------------------------|--------|-----|------|-------|
| Papaye | Guyana | Exempt | | Exempt | 7% | 2,5% | 2,10% |
| Cerisier carré | Guyana | 8,3% | 4,8% | Exempt | 15% | 2,5% | 2,10% |
| Limettier | Guyana | 8,3% | 4,8% | Exempt | 15% | 2,5% | 2,10% |
| Carambolier | Guyana | 8,3% | 4,8% | Exempt | 15% | 2,5% | 2,10% |
| Banane verte | Guyana | 680 euros/100 kgs net | 380 euros/100 kgs net | Exempt | 7% | 2,5% | 2,10% |

DD= Droits de douane/**DR =**Droits réduits (si le certificat d'origine **FORM A** est produit)

DD= exempt pour **ACP** (si **EUR1 PRODUIT**) **OM=** Octroi de mer/**DAOM =** Droit
Additionnel à l'octroi de mer

TVA: Taxe sur la valeur ajoutée

NB: le Guyana est un **ACP**

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