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EXPORT MARKET OPPORTUNITIES

MARKET PROFILE:

MARTINIQUE

A RAPID RECONNAISSANCE SURVEY



EXPORT MARKET SERIES: BULLETIN NO. 8

February 2003

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Ministry of Fisheries, Crops and Livestock
Guyana Office for Investment
New Guyana Marketing Corporation

Export Market Series Bulletin No. 8

February 2003



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Preface

This publication marks the beginning of a series of market bulletins which seek to provide relevant and timely information about markets and product potential for producers and exporters of non-traditional commodities. Although Guyana depends largely on its traditional exports of rice and sugar; minerals such as gold, bauxite and diamonds; and timber, most small and medium firms focus on sectors such as fresh produce, agro-processing, fish and seafood, and value added wood products, among others. The first bulletins in this series are not market studies in the true sense, but instead they are rapid reconnaissance surveys of the export potential for various Guyanese non-traditional exports in the a variety of markets. The purpose is first, to identify the level of demand for non-traditional export products currently produced in Guyana and ascertain whether these products are produced locally or are imported. A second objective is to determine what, if any, is the level of market penetration of Guyanese products. Thirdly, the surveys attempt to capture the preferred characteristics of the different products in each market, and at the same time, to assess the success or failure of Guyanese exporters in meeting this market demand. Where available, prices for the different commodities are provided, if only for a specific point in time. Finally, useful contacts are provided where exporters may obtain additional information on the various commodities, market prices, import and custom requirements, etc. in the importing country. Producers and exporters who are interested in obtaining additional information about the demand for their products in overseas markets are urged to contact either the Ministry, Go-Invest or NGMC. In many instances these agencies may be able to put exporters in direct contact with potential buyers, wholesalers and retailers in the importing countries. Mention on importers, wholesalers or distributors and firms in this Export Market Bulletin Series in no way constitutes a recommendation for that individual or company. A background check of that individual or company is always prudent. At a minimum, inquiries can be made through the local Chamber of Commerce.

The undertaking of these market surveys also serves to reaffirm the collaboration among the Ministry of Fisheries, Crops and Livestock; Go-Invest and the New Guyana Marketing Corporation (NGMC) in improving quality, increasing production and promoting exports. As a team, the three agencies are working on the problems, limitations, and constraints identified in the surveys, from production and post harvest handling problems, to packaging and transportation, to final market access.

Go-Invest and NGMC maintain a list for many countries of importers, wholesalers and distributors of fresh and processed fruits and vegetables, lumber and wood products and fish and seafood. For more information, contact us at:

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MARTINIQUE

BACKGROUND NOTES

Martinique is one of the larger islands in the Caribbean and, like Guadeloupe, has been a French department since 1946. The island is located between Dominica and St. Lucia and is 120 km south of Guadeloupe. It is 596 km southeast of Puerto Rico. The island is approximately 1,128 sq km in size and is mostly mountainous, with only 10% of its surface being flat along the coastline and in narrow valleys. Over 46,452 ha are forested, mostly on the mountainsides.

The island has two distinct climatic regions, the sunny, drier South and the rainy, cooler North. The southern part of the island is flatter and less forested than the northern part of the island, which is mountainous, volcanic and forested. The highest point on the island is Mount Pelée, a volcano in the North, with a height of 1,397 m.

The climate is humid tropical, moderated by the trade winds. The temperature varies between 20° and 32° C throughout the year. There are two marked seasons. There is a warm dry period that occurs from January through May-June, with temperatures of 22° to 30° C and rainfall of 55 mm (April) to 146 mm (January), although February may experience higher precipitation (196 mm). From July through December the climate is hot (25°-31° C) and wet, with average monthly rainfalls between 146 mm (December) and 295 mm (November).

As previously mentioned, the island is a French department and is subject to both the laws of France and European Union norms. The official language is French, although many of the islands speak a French patois dialect.

The total population of Martinique is an estimated 381,427. The capital is Fort de France, which, with the nearby towns of Case-Pilote, St Joseph, Schoelcher and Le Lamentin, make up the most densely populated area of the island, approximately 170,187, or around 45% of the total population, live in this area on the middle eastern coast. Le Lamentin is an industrial park found on the outskirts of Fort de France. The majority of the remaining population is scattered among four other important towns of 15,000-21,000 inhabitants: Ducos, Sainte Marie, Le Robert and Le François. Ducos is located in the central area south of Le Lamentin and the other three towns are along the coastline west of Fort de France. There are very few people living in the mountainous, northern area or in the hot and dry South.

The major ethnic composition of Martinique is 90% African and African-Caucasian-Indian, 5% Caucasian and less than 5% East Indian, Lebanese and Chinese.

The number of Guyanese immigrants in Martinique is unknown but would fall in the immigrant category "Other American" or "Other" which altogether totals 900 persons.

The Honorary Consul for Guyana in Guadeloupe does not know of any Guyanese in Martinique, but given that the number of Guyanese estimated in Guadeloupe is less than a dozen, they would probably number less than a dozen as well in Martinique.

Infrastructure

Martinique has one major container port and international airport, both located in or near Fort de France.

The Chamber of Commerce and Industry of Martinique has managed the seaport since 1953. It has undergone a number of modernization projects and has a bulk carrier wharf, container terminal with three gantries and a cruise ship quay with two berths that provides direct access to downtown Fort de France. The seaport has 75 acres of storage space with 215,000 sq.ft. of sheds. There is also cold storage facility at the seaport.

Maritime cargo lines include: Compagnie Generale Maritime (CGM- "The French Line"); Bernuth lines, Crowley American and Tropical Shipping. CGM has connections to Europe, French Guyana, Cuba and the Caribbean and Latin America.

The Fort de France/Lamentin airport is located in the center of Martinique, 7 ½ mi from Fort de France. The Chamber of Commerce and Industry of Martinique has managed the airport since 1965. The freight terminal has an area of 10,000 sq. yards and an annual capacity for 30,000 metric tons of cargo. The terminal has two warehouses with cold room capacity. These are managed by Air France Cargo.

ECONOMIC OUTLOOK

According to 1997 data released by Institut National de La Statistique et des Etudes Economiques (INSEE) in 2001, of the Gross Domestic Product of 4.96 billion euros, agriculture contributed 3.2%, industry, 20.7%; Public Works, 4.5%; Services, 49.9%; and administrative services (public, education and health related), 20.7%.

In general, the economy in 2001 performed well. A notable exception was in tourism, which, as for the rest of the Caribbean region, suffered another poor year. Three consecutive years of increases in imports that exceeded exports has continued to aggravate the trade deficit. However, the number of new business start-ups increased for the first time in five years.

Despite an overall good economic performance in 2001, the government of Martinique is having problems with its budgetary spending. In September 2002, Voluntary firemen are demonstrating for not having been compensated for vacation time in 2001. As a result of the number of problems that the local government in Martinique has had in meeting its 2001-2002 budget, France has requested a detailed report on budgetary spending for 2001.

The sector that experienced the worst performance in 2001 was tourism. In 2001, the number of visitors dropped 19% in comparison to 2000 and, on average, stayed a day less than in 2000. Fewer than 8% of tourists were non-French, which represents another drop in the number of foreign visitors, making the industry increasingly more dependent on French tourists. The number of cruise tourists dropped by 30% and the number of cruise ship arrivals dropped from 288 in 2000 to 224 in 2001, which is the worst performance for that segment of tourism since 1984. The number of stay-over tourists dropped by 13% from 2000.

The downward trend in the number of tourists began in 1999 and continued through 2000 and 2001, with an overall drop of 3.5% between 1998 and 2000. Considering the drop of 118,000 tourist arrivals between 2000 and 2001, the decline between 1998 and 2001 was 25%, with the largest loss for the period, as noted above, being in 2001. The hardest hit lodging establishments were the 1-2 star hotels (-57% between 1998 and 2000) and the vacation villas (-40% for the same period). Three and four star hotels picked up much of the loss from the other two categories of hotels, with an increase in occupancy of nearly 20% between 1998 and 2000 (Antiane: La revue économique et sociale des antilles Guyanne, July 2002, Institut National de la Statistique et Des Études Économiques).

In 2001, the loss to the sector was around 11 million euros in comparison to 2000. The consequence to employment was an industry-wide loss in average employee salary of 27%, with large hotel employees suffering an average drop of 46% in salaries.

The destruction of the World Trade Center towers in 2001 did not help the position of the tourism sector in Martinique, but it was also not entirely to blame for the on-going decline in numbers of tourists that proceeded that event. The loss of air service (Air Caribe and American Eagle), increased travel costs for French citizens and the resulting switch to more affordable, closer-to-home vacation destinations for the economy travelers are also partially to blame.

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

DOMESTIC PRODUCTION

Fruit and Vegetables

The most recent statistics available for agriculture of Martinique indicate that between 1991 and 1999, the amount of land involved in agriculture has declined slightly from 35% to 31%. This is the result of the increased substitution of mechanization in place of expensive hand labor and the resulting need to retire hillside fields, which were not appropriate for machine operation for the crops under cultivation. By 1999, there were 21,848 ha of arable land on Martinique.

In 1999, more than half of the arable land was in bananas (11,200 ha). The other single important plantation crop on Martinique was sugar cane (3,140 ha). The production of banana and sugar cane increased between 1989 and 2000 by 12% and 7%, respectively. As these require flat land and are highly mechanized agricultural enterprises, they would account for much of the shift in production from hillside to flat land and from hand labor to mechanization, although both require considerable hand labor for certain production and processing activities.

The rest of the land was in use for vegetable production (4,391 ha), including fresh vegetables (2,471 ha) and roots and tubers (1,920 ha); fruit production (666 ha) of which 282 ha were in citrus production and the remaining area in various fruit crops; flowers (295 ha) and pasture (10,862 ha) or fallow (800 ha). However, area planted in citrus has declined by 49% in Martinique between 1989 and 200. Also, flower production dropped 22% as well during the same period. There is some pineapple production but there is no data available on area planted; however, pineapple produced in Martinique can be found not only in supermarkets in Martinique but also in St. Maarten. It appears to be a Smooth Cayenne.

With increasing dependence upon mechanization, retirement of farmers and abandonment of un-economical land, the number of laborers employed in farming has also declined. Statistics indicate that between 1988 and 1997, the number of farmers had declined three-fold from 16,037 to 5,390 and the average age of the remaining farmers, in 1997, was more than 55 years. Between 1993 and 1997, a short three-year period, the number of small farms, those less than 5 ha in size, declined by more than half from 9,401 to 4,295 farms, while the number of farms larger than 10 ha increased slightly from 429 to 450.

Seemingly, 4,725 ha were removed from agriculture between 1998 and 1999, a 1.5% loss in agricultural land. During this period there was a slight shift in agricultural activities from plant to animal production. The area under cultivation for crops dropped by 2.5% (273,280 to 266,420 ha) while the area in animal production rose by 6.4%, from 33,386 to 35,521 ha. Most of the animal production increase was in traditional style pasturing, which does not significantly impact the economy.

Red Meats

Animal production in 1999 represented only 10% of agricultural activity in Martinique. Most animal production at that time was traditional pasturing of livestock. Poultry production was particularly deficient and most of the demand, some 93% in 1998, was supplied by imports.

Sheep production dropped by half between 1989 and 2000 and goat production dropped by 12% during the same period. Only cattle production remained stable. In 2000, there were an estimated 130,000 cattle, 132,000 pigs, 68,000 goats and 23,000 sheep on Martinique. There were an estimated 3,267,000 poultry and rabbits (which are reported together) on Martinique in 2000 (Agreste DOM, March 2002).

Fish and Seafood

Martinique consumed an estimated 16,000 metric tons (mt) of fish in 2000. Most of the demand is supplied by imports. The exact amount of fish consumed and supplied by local production is a broad estimation as most local catch is sold directly to the consumer, sales for which there are no records to use for estimations.

Fishing in Martinique is largely artisanal. As of 2000 there were an estimated 864 fishing boats, an overall decrease of 30% in the fishing fleet size, and 942 fishermen (-3%) in comparison to 1996 figures. The number of overnight and coastal (1-4 day offshore) fishermen suffered the greatest part of the loss while the number of larger fishing operations (> 96 hr trips) grew from 7 in 1996 to 32 in 2000. At the same time, the amount of exports increased from 7.9 mt (metric tons) to 48.7 mt and imports declined from 7,488 mt to 7,217 mt, most of which is probably due to efforts by the larger fishing enterprises.

The most recent report on the area in production of fresh water shrimp (*Macrobrachium rosenbergi*), 1998, estimated that there were 22 ha of ponds in production that year. The number of producers in 1998 year was 23, working a little less than 1 ha each. This was a peak year for production, 40 mt were reported harvested. However, in 1999 that level dropped to 25 mt where it remained in 2000.

THE WHOLESALE SECTOR

The distribution system for food products is sophisticated and intertwined with that of Guadeloupe.

There are five major food importers in Martinique: Sogedial Martinique, Rene Lancry, S.A., Multigros, Ets. George de Negri and Sodicar.

Sogedial is a franchise of the French distributing giant, Promodes, whose parent company is located in Le Havre, France. It is also present in Guadeloupe and French Guiana. In Martinique, Sogedial was formed by the acquisition of several small wholesalers and now consists of the following subsidiaries: Berthier, Martinique Frais, Sofrima, Promo Cash and Fabre, S.A. Each of these specialize in a food category: fresh, frozen, meat, groceries, etc. Sogedial is a major supplier of the Promodes franchise retail stores such as Euromarché, Continent, Champion and the Huit-a-Huit superettes. It has supplied Cora and Match, which belong to Groupe Reynoird and other island retailers, institutions and the HRI on Martinique.

Rene Lancry, S.A. and Multigros are the closest competitors to Sogedial. Lancry owns Continent and supplies Euromarché and Hyper U. Multigros owns its own supermarkets. These two wholesalers also supply other retailers and the HRI. George de Negri and Sodicar are small wholesalers and do not have any retail outlets.

Rene Lancry, S.A. buys roots and fruits from the Caribbean and yams from Costa Rica. Promocash is also sourcing yams from Costa Rica as do Socoprim and Socopgel, both smaller wholesalers. Martinique Viande sources vegetables from Martinique but reported having sourced fruit from Guyana and other products from Jamaica. It also buys products from the US.

Competition is strong among the four larger wholesalers. These have extensive facilities for storage, handling and distributing food products, including a warehouse and fleet of refrigerated and non-refrigerated trucks.

THE RETAIL SECTOR

Martinique has a large number of small country shops, green grocers, butchers, superettes, supermarkets (retailers with >8,000 sq. ft. of floor space) and hypermarkets (stores with more than 32,000 sq. ft. of floor space). Table 2 in Annex II is a short list of some of the green grocers on Martinique. The supermarket and hypermarket retailers are the most important retail food outlets on Martinique.

Fresh produce, fish, meat and poultry are also sold through open markets and covered public markets. These are important in the countryside for the sale of fresh foods, although they tend to be more expensive than supermarkets. In Fort de France, there is a covered market a couple of blocks away from the waterfront behind the Chambre de Commerce. Public markets are less frequented on Martinique than previously and are fewer in number than those in Guadeloupe.

Supermarket Retailers

There are five major hypermarkets in Martinique: Euromarché (Carrefour), Hyper U, Carrefour (formerly the Continent), Primistères Reynoird and Le Phare. The Groupe Primistères Reynoird retail outlets Ecomax, Match, and Cora, along with Leader Price, are the cost leaders in Martinique, as they are in Guadeloupe. Super H is owned by the wholesaler, Multigros.

Consumer Trends

As in Guadeloupe, the tastes of consumers in Martinique are greatly influenced by the French market. There has been a growth in the supermarket and hypermarket industry, which is reported to have changed the consumer's food buying behavior. More consumers are attracted to shopping at discount supermarkets and modern hypermarkets.

Consumers tend to shop weekly and use credit or debit cards, cash and checks for payment. Women still tend to do the majority of the shopping. Advertising and promotion of products is common.

Fresh Fruit and Vegetable Products

There are no Indian vegetables (long beans, bitter melons, etc.) found on the local market or in the supermarkets. Christophine is available but it is the white, spiny variety, not the light green, spineless variety found in the more western islands closer to the Central/South American coastline. The eggplant is striped and more like the “Black Beauty” in form. No Indian, Japanese or Chinese eggplants were seen in the market. Beans are the European type varieties (“haricot verte”), which resemble the runner string bean. The only summer squash observed was the zucchini.

The root crops found in the supermarkets of Martinique are similar to those in Guadeloupe. The predominant roots found in the market are: potatoes (imported from Europe), sweet potatoes (red-skinned, similar to the “Bush Bok” variety), madère (taro) igñames (yams) and various malangas. Some manioc (cassava) may be found in local markets but were not found in the large supermarkets. Many of the roots and tubers, while of the same general groups as those of Guyana, differ in form. For example, the malanga sold in Guadeloupe and Martinique appears to be an eddo but is larger and more elongated in form, more like tannier. There are several different forms of “igñames” (*Dioscorea* spp), or yams: Portuguese, de chine (Chinese yam) and de chou. These are very large roots that have thick, corky skins. None of the smaller smooth white-skinned or red-skinned yams were found in the supermarkets visited in Martinique. The root crops are currently being sourced from local producers, Dominica and Costa Rica (igñame, principally).

The pumpkin is called “giraumont” in the French Antilles and is not the large variety found in Guyana and many of the British acculturated islands. It is a smaller, smoother, light-skinned variety.

Fish and Seafood and Red Meats

Carrefour has “Mangez-local” (“Eat local”) signs at point of sales of beef and at Cora above the pork section. Carrefour and Cora had larger meat sections in comparison to the Leader Price visited. See Table 2 in Annex II for retail prices for red meats in three supermarkets in the Fort de France-Cluny area of Martinique.

According to the Institut National de la Statistique et Des Etudes Economiques (INSEE), the average price in 2001 for pork chops and fresh local chickens was euro 9.00/kg and 5.31/kg and in the first seven months of 2002, euros 8.99 and 6.48/kg, respectively. Prices found in the supermarket during this trip fall in closely with these figures.

The two fish found in the frozen section in a majority of the supermarkets visited were snapper and mackerel. Carrefour had the widest selection of fish and offered: cod, billfish, marlin, tuna and dorado as well as the snapper and mackerel. Shrimp were found in both Leader Price and Carrefour, but not Cora. The sea bob and prawns found in the Carrefour were processed in French Guyana. The tuna was from Yemen. Sardines were

also for sale in Cora but the price was for a packet of filets and weight was not specified. In addition to French Guyana and Yemen, frozen fish were sourced from the US (Oceamer), Portugal (Nigel brand) and Thailand (Elephant brand) and Indonesia.

INSEE reports the average retail price per kilogram in 2001 for whole sardine, tuna and cod, as euro 9.59, 9.10 and 8.70, respectively. In the first seven months of 2002, the average retail price for these fish were euro 10.47, 9.44, 9.27, respectively.

Sauces, Seasonings and Preserves

The sauces and seasonings found on the market in Martinique and Guadeloupe differ from those of the rest of the Caribbean. A marked difference from these islands and the rest of the Caribbean is the type of sauces to be found in the supermarkets. In contrast with the rest of the Caribbean where hot sauces are numerous, on Martinique usually only two or three brands of hot sauce may be found on the supermarket shelf, one of which is usually Tabasco sauce, the McIlhenny product, imported from France. Barons Classic Hot Sauce was found in Cora and Carrefour. Also, Bello Pepper Sauce and S.P.I.C.E. were found in Cora and Carrefour.

There are no jerks, green seasoning, onion or garlic seasoning found in the three supermarkets surveyed on the day of the survey. Instead, there are numerous mustard-based seasonings and sauces, proof of the promotional strength of the French mustard industry. Instead of East Indian condiments, Southeast Asian condiments may occasionally be found. Fish sauce is usually available, a legacy of the French colonization of Southeast Asia. The brands found are almost exclusively French or Canadian. Some American products may be found (peanut butter, cereals, detergents). No CARICOM products, such as Matouk or Chief, were found among the condiments, sauces, seasonings, jellies or jams. The brand of preserves, including jellies and jams, with tropical flavors found in Carrefour was “Aurore”, which offered such tropical flavors as red papaya, passion fruit and giant granadilla. Leader Price’s brand “Confiture Bonne Maman” has products made of: guava, banana, cherry, raspberry, mixed fruits and blueberry.

Interestingly, in the Fort de France public market, new bottles of products of Barons of St. Lucia were being sold at many stalls.

Lumber and Wood Products

FAOSTAT (United Nations’ Food and Agriculture Organization’s statistical database) data on the production, import and export of wood products for Martinique appear to have been updated up to around 1994 for most products. Sometime after that date the numbers stop changing for many categories of products. An eight-year interval is too great to allow extrapolating a trend in demand for these products. However, it is known that over \$300 million in lumber products are shipped to the Caribbean Basin by the US annually (Salamone, 2001). The majority of this is softwood lumber and plywood,

however, some of it is tropical hardwood as well and some of the tropical hardwoods are being shipped to Martinique and Guadeloupe (FAS/USDA, forest products database).

There are a number of enterprises that handle imports of tropical hardwoods in Martinique. Martinique processes much of this wood into value-added products such as home-building kits, which are sold domestically and exported.

Three companies contacted showed interest in discussing possible business relationships with Guyana's lumber and wood producers. These were: DISTRIBOIS, Thibaud Bois and SOREBOIS. More information on these companies is available from Go-Invest.

The representatives of these companies indicated that much of their wood imports are coming from Brazil and French Guyana. Greenheart was of interest to two of the respondents, DISTRIBOIS and Thibaud Bois. The representative of Thibaud Bois did show strong interest in greenheart, particularly for dressed lumber, as he felt that there is a growing demand for that wood in Martinique. It is being used on Martinique in home building, boat building and decking around swimming pools. In contrast, the representative of SOREBOIS felt that there were too many problems with greenheart as it was a hard wood to work. He is more interested in other species, such as angelique (*Dicorynia guianensis*), which is found in Surinam and French Guyana, and amarante (purpleheart).

All of these wholesalers showed interest in discussing other tropical hardwoods besides the purpleheart and greenheart.

IMPORT REGULATIONS AND REQUIREMENTS

As an Outre Mer department of France, Martinique is subject to the regulations and requirements of the French government concerning imports. As a member of the EU, France is obligated to comply with the regulations and requirements of the EU concerning imports, thus Martinique must also comply with those of the EU.

However, France recognizes that the Outre Mer departments have special concerns, particularly in the areas of phyto- and zoö-sanitary issues and the environmental and economic effects of imports, that are not adequately addressed in the national regulations and, therefore, the Outre Mer departments are allowed to make some discretionary decisions concerning regulation and taxation of certain imports. Therefore, some of these may differ from the French regulations and tariffs for some products, particularly agricultural products.

France allows the Outre-Mer Departments to apply a special tariff on imports, known as the Octroi de Mer tariff and Additional Octroi de Mer tariff, at their discretion. This is permitted in recognition of the special social and economic concerns of those departments with regards to imports of some items.

However, as co-signers of the Lomé Convention and members of the ACP, products from Guyana are exempt of certain of these taxes.

Fresh Fruits and Vegetables

Some fresh fruits and vegetables are allowed into Martinique 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.

Decree 5 May 1994 made EU Directive 91/414 EEC law in France. This EU directive controls the pesticide products that can be used on fruits and vegetables and their maximum residue tolerances. The contents of this directive can be seen at <http://www.agriculture.gouv.fr/wiphy>. Information concerning the minimum pesticide residue tolerances for the EU can be found at www.coleacp.com. General international guidelines are provided by the Codex Alimentarius in CAC/MRL 1 (http://apps.fao.org/CodexSystem/pestdes/pest_e.htm).

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.

In general, the required documentation for most of the products that may be imported include, at a minimum, a phytosanitary certificate and some form of phytosanitary control. For example, in the case of citrus exports to Martinique, the Decree of 3 July 2002 allows four alternative phytosanitary controls: (1) that the product come from areas proven to be free of fruit flies or (2) the citrus product is shown by examination by officials of representative samples to be free of fruit flies in all development stages in the production site or (3) protocol in which the phytosanitary service of the exporting country has made at least one inspection monthly over the three months preceding the shipment and have not observed fruit flies in the production area and that none of the fruit to be shipped show signs of fruit fly infestation or (4) the product has been treated before export by means of a cold treatment protocol established by the US Department of Agriculture (Order 3 September 1990 and Order 3 October 1991). If interested in this protocol, please be aware that it is currently under revision by the USDA (www.pestlaw.com/fedreg).

Each fruit and vegetable for which an inquiry was made has its own phytosanitary control requirement. Therefore, it is recommended that before preparation of f&v for export to Martinique, the exporter contact the Service de la Protection des Végétaux to confirm the specific phytosanitary control for each product to be exported.

Imports of bananas and plantains are strictly prohibited.

Imports of fresh f&v are subject to taxation. Because Guyana and Martinique are both members of the ACP (Africa, Caribbean and Pacific), the Octroi de Mer tariff is not

applied for most f&v, however there are a number of other taxes that might be applied at different rates, depending on the product.

Fish and Seafood and Red Meats

The French Ministry of Agriculture and Fisheries Order of 6 June 1994 prohibits the import of live animals and their products, animal foodstuffs and foodstuffs of animal origin into France from third countries, except for those products on the Commission or Council list covered by EU Directive No. 91/493 of 22 July 1991, which lays down the health conditions for the production and placing on the market of fishery products. Imports of these products are allowed only when the sanitary conditions are in accordance with established rules and from establishments or centers that appear on the lists corresponding to these categories of products concerned that are established by the decision of the Commission.

There are a number of implementation directives that attend the 91/493 Directive. These address such issues as the types of treatments allowed for control of pathogenic organisms, criteria for the production of cooked seafood, rules regulating visual inspection for parasites, certification of fishery products and health certificate for imports into the EU (Decision 93/185 /EEC 1993) limits on mercury levels in fish and seafood, etc. The requirements of all of these implementation directives must be met as well as those of the primary directive 91/493.

As Guyana does not appear on the list of countries allowed to export to the EU and do not have a decision for the approval or conditions of approval for EU-certification of fish processing plants or ships, then those products are prohibited entry into Martinique from Guyana.

In addition to the Directive controlling admissibility of fish and seafood products into EU-member countries, the Codex Alimentarius of the UN provides international guidelines for practices for the handling of frozen fish, CAC/RCP 16-1978.

There are a number of EU regulations and guidelines concerning meat and poultry imports. Consult www.europa.eu.int/eur-lex/en/lif/en_analytical_index_03.html for the lists of regulations and directives governing the import of agricultural products.

Codex Alimentarius international guidelines for the handling practices for red meats are set out in CAC/RCP 11-1976, Revision 1 (1993) (www.codexalimentarius.org).

Sauces, Seasonings and Preserves

EU Directive 79/112 of the Council of 18 December 1978 and later amendments to that directive govern labeling requirements for imports into Guadeloupe. 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.

The use of additives in processed foods sold in France is controlled by Order 2 October 1997 and Order 31 July 2001. Processed food products must be first analyzed by a government laboratory in Paris for content and food safety before they may be allowed import into Martinique.

Lumber and Wood Products

No information was provided either by the phytosanitary or customs services on the requirements for imports of wood or wood products.

CHALLENGES TO GUYANA'S EXPORTERS

Imports of products that would compete with those produced on Martinique will find it difficult due to the very protective treatment that they receive from France and the EU. As a signatory of the Lomé Convention, Guyana's imports will avoid certain DOM tariffs but will experience resistance in other areas.

The export of processed food products such as sauces, seasonings and preserves; fish and seafood and red meats all face exclusion from the consumer food market in Martinique market for lack of certification by the EU of their production and processing processes.

Because it was felt that French DOM islands are at a disadvantage in terms of cost competition because of high transportation costs and costs to acquire certain vital supplies for the agricultural production and the food base on the islands due to their remoteness from suppliers, EC Council passed Regulation No. 1452/2001 of 28 June 2001, which introduced specific measures to protect the production of certain agricultural products for the French overseas departments, including Martinique. Those measures included EU direct payments to farmers and financial support of programs to support production and processing programs to improve the competitiveness of island producers of, among other products, livestock, pineapple and timber in forests and wooded areas belonging to the private sector and townships. As a result of this regulation, flower, fruit, vegetable and live plant producers receive EU financial aid and assistance from production and marketing programs. Producers receive Euro 6.04/kg for green vanilla produced for the production of dried black vanilla or vanilla extracts up to an annual maximum quantity of 75 mt. Melon and pineapple production may also receive aid. Martinique is apparently trying to develop a pineapple canning industry.

Also among the measures are the removal of tariffs on imports of agricultural inputs: breeding livestock and seed material (potatoes), animal feed and cereals for animal feed and vegetable oils and fruit pulp, purées and juice concentrates for agro-processing.

Additionally, the regulation also postpones the implementation of EU directives that would interfere with the competitiveness of producers on Martinique and the other French DOM.

This regulation would make it difficult for imports from Guyana of certain fruits and vegetables to compete with certain of these products receiving aid, pineapple for example, because of the subsidies and unequal application of certain regulation on imports but not on domestically produced products.

Lumber faces competition from Brazil, a large producer of wood products, and French Guyana. Shippers of lumber and wood products in French Guyana have advantages in terms of long-term relationships with buyers and government officials in Martinique, its political/economic position as comprising part of France and the Outre-Mer departments and cultural advantage as being essentially French and French-speaking.

OPPORTUNITIES AND RECOMMENDATIONS

Before engaging in any business transaction with a business or buyer in Martinique, a background check for business practices is recommended. The businesses mentioned in this report have not undergone any background check. The Chamber of Commerce and Industry should be consulted, at a minimum, for the backgrounds of businesses in Martinique.

Fresh Fruit and Vegetables

Fresh fruits and vegetables may be competitive, if admissible. Their admissibility must be established by studying the additional phytosanitary controls required, product-by-product. A list of admissible and potentially admissible (based on developing production and post-harvest handling protocols meeting the regulatory requirements of Martinique) f&v can be developed. Also, sufficiently fast and economical transportation must be available to be competitive with both competing importers and domestic producers on the basis of both price and service.

Wholesalers interested in receiving Guyana's products should be contacted. Inquiries should be made into which products and what varieties of those products are in demand on Martinique. Some wholesalers, while familiar with the products that they are receiving may not know off-hand the name of the variety of the product that they are receiving. A digital photograph sent by email may help identify exactly what is selling in the market. Inquire as to sizes received, packing materials and sizes: weight and count.

Cost-return studies and a trial shipment of several types of f&v will indicate which products will be profitable and what problems will be encountered in shipping and Customs clearance that may not be obvious from communications with Customs agents and wholesalers.

Do not offer a price list until a cost-return study has been made to determine the price range needed to cover total cost and required profit margin.

Red Meats

The insufficiency of local production to meet demand and the consequent reliance on imports for red meats offers an opportunity for Guyana. Because the importance of agriculture overall to the economy is decreasing and the even smaller contribution of animal production to the economy would suggest that the government of Martinique would be little inclined to throw up barriers to imports to protect domestic producers of red meats. However, as much of the meat imported is from mainland France, there would be incentives to protect French imports from competition from meat imports from Guyana. Obstacles that can be used to prevent Guyanese imports are tariffs (as France is not an ‘importer’ it is not subject to some taxes that Guyana, even as a ACP partner to Martinique must pay) and quality standards and regulations (e.g., meat packing plant hygiene standards, types and counts of microbiological organisms in the product itself and in the production area, feeds used to fatten livestock, etc).

A cost-return study that considers the effect of: (1) initial investment cost to acquire EU certification, (2) annual costs to meet EU processing facility sanitation requirements and (3) tariffs that might be applied to red meat imports from Guyana should be conducted to determine whether Guyanese meat exports would be cost competitive with French (and other) meat imports to Martinique. Also, guidelines for the meat quality required to meet the expectations of consumers in Martinique (i.e., minimum and maximum fat content relative to flesh, tenderness, cuts, etc) need to be established. This may be done by consulting with potential buyers as to their requirements, which, presumably, reflect those of the consumers, their clients. This would be needed for each type of meat under consideration, which should include at least: lamb, mutton, veal, beef, horse and goat; that is, livestock that requires large scale production because of the need for large herds and thus large grazing areas and feedlots (which have to be somewhat retired from urban areas to be tolerated by the community) for economies of scale.

For those meat products that the cost-return study results suggest would be profitable, joint venture efforts by the government and private level should be made to acquire EU certification and admissibility to Martinique.

EU-certification and tariffs aside, poultry would seem a particularly good opportunity, considering the dearth of locally produced broilers. The suggestions made above for red meats would also apply to determining the profitability of chicken, and other poultry, exports to Martinique from Guyana.

Lumber and Wood Products

Island communities are largely dependent on imports to meet local demand for wood products. The types of woods used depend on the relative purchasing ability of the buyer and current taste trends for woods. There appears to be a demand for luxury woods such

as the tropical hardwoods (as compared to cheaper softwoods) in Martinique. The strong interest shown by three of the lumber wholesalers contacted indicate that there is demand for more of these products.

Contact should be made with the interested wholesalers to determine in which woods and what products they are interested and the volumes needed and the prices that they would propose to pay the importer.

Once the exporter knows what products will be considered for export, the Customs and phytosanitary services can be contacted and provided the detailed information that they need to establish the Custom fees and tariff rates and phytosanitary control measures required (some countries require fumigation treatment for certain woods), if any.

Once the costs of the appropriate tariff and customs fees are known and a price range established, a cost-return study could be made to determine the profitability of shipping different products to Martinique.

IMPORT DOCUMENTARY REQUIREMENTS

Import transactions that exceed \$50,000 in valued must be conducted through an approved banking intermediary. Also, after import and financial arrangements have been made, the shipper has six months to make the export.

The general documents required:

- Commercial invoice
- Bill of lading or Airway Bill
- Certificate of origin
- Any additional certificates: phytosanitary and certificates of phytosanitary controls and zoosanitary certificates, as applicable

In order to receive the benefit of the exemption from certain tariffs provided by membership in the ACP, a EUR 1 document, authenticated by the Customs service of Guyana must be provided with the shipment. Nevertheless, the shipment will still be subject to Customs clearance charges, the value-added tax and certain other taxes (Fiches-Export, 2001).

Due to the complexity and ongoing state of evolution of import regulations in Martinique, exporters should verify the documents, their formats and the number of copies of each that are needed for Customs clearance in Martinique with the importer before making any shipments.

Go-Invest and NGMC maintain a list for many countries of importers, wholesalers and distributors of fresh and processed fruits and vegetables, lumber and wood products and fish and seafood. For more information, contact us at:

Go-Invest
190 Camp Street
Georgetown
Guyana
Tel: 592 225 0658
592 227 0653
Fax: 592 225 0655

NGMC
87 Robb and Alexander Streets
Georgetown
Guyana
Tel: 592 226 8255
592 227 1630
592 226 2219
Fax: 592 227 4114.

ANNEX I

USEFUL CONTACTS

**Ministère de l'Agriculture and Forest of Martinique
Service Protection Végétaux (Phytosanitary Service)**

Pointe des Sables, 97295 Fort de France Cédex

Contact: Mr. P. Bertrand

Position: Chef de Service

Tel: 05-96-70-27-62

Fax: 05-96-73-90-40

Email: SPV.DAF972@agriculture.gouv.fr

**Ministère de l'Agriculture and Forêt de Martinique
Service Vétérinaire**

Quartier Tivoli 97200 Fort de France

Tel: 596-64-24-90

Fax: 596-64-23-74

Customs Service

Address: 50 Rue Martin Luther King 97200 Fort de France

Tel: 596-60-0050

Fax: 596-73-1088

Direction Regionale de la Concurrence, Consommation et Repression des Fraudes

Address: Residence La Caille Quartier Petit Paradis 97233 Schoelcher

Tel: 596-60-08-82

Fax: 596-63-79-76

Chambre de Commerce et D'Industrie de la Martinique

Address: 50 Rue Deproge Fort de France

Contact: Mme. Phares

Position: Fichier des Entreprises, Direction Juridique

Tel: 596-55-28-78/55-29-18

Fax: 596-55-29-91

Email: frco@martinique.cci.fr

Chambre de Commerce et D'Industrie de la Martinique

Address: 50 Rue Deproge Fort de France

Contact: Elizabeth Grant

Position: Liaison, Centre d'Affaires International

Tel: 596-55-28-19

Fax: 596-71-66-80

Email: cai@martinique.cci.fr

ANNEX II

TABLE 1. RETAIL PRICES FOR FRUITS AND VEGETABLES IN SUPERMARKETS IN MARTINIQUE IN SEPTEMBER, 2002.

PRICES QUOTED IN EUROS/KG.

Product	Source	Cluny Cora	Leader Price	Carrefour	Average (Euro/kg)	Average (US\$/kg)
Christophine	Guadeloupe	4.00	2.80	3.99	3.60	3.57
Cucumber			0.95		0.95	0.94
Eggplant		0.91	0.50		0.71	0.70
Tomato	Martinique	3.90		4.80	4.35	4.32
Pumpkin		1.52	1.52	2.28	1.77	1.76
Sweet potato		1.60		1.15	1.38	1.37
Chou de chine		1.52	0.99	1.20	1.24	1.23
Chou Caraibe		3.00		2.25	2.63	2.61
Yam, Portuguese	Martinique	3.90		3.95	3.93	3.90
Yam "Pakala"	Costa Rica	1.90	1.40	1.60	1.63	1.62
Potatoes	France	1.22	0.80		1.01	1.00
Papaya		1.82	1.30	2.28	1.80	1.79
Avocado		1.81	1.80	1.59	1.73	1.72
Watermelon		0.90		0.45	0.68	0.67
Pineapple		1.15	1.30	1.71	1.39	1.38
Plantain		0.99	0.65	0.75	0.80	0.79
Lime			1.15	1.17	1.16	1.15
Ginger root			6.05		6.05	6.01

Exchange rate is euros 1.007 = US\$ 1.00.

TABLE 2. RETAIL PRICES FOR VARIOUS RED MEATS IN THREE SUPERMARKETS ON MARTINIQUE, SEPTEMBER 2002. PRICES IN EUROS/KG. EXCHANGE RATE IS EUROS 1.007: US\$.

Product	Presentation	Cluny Cora	Leader Price	Carrefour	Average (Euro/kg)	Average (US\$/kg)
Lamb	leg	7.20	7.80	9.42	8.14	8.08
	chop	14.31	7.05		10.68	10.61
Pork	chop	8.67	9.40		9.04	8.97
	shoulder	8.37			8.37	8.31
Beef liver			3.60	4.56	4.08	4.05
Beef	Sirloin steak		16.72	17.87	17.30	17.17
	shoulder	8.07			8.07	8.01
	steak	12.49		13.80	13.15	13.05
	rib steak	16.77		18.50	17.64	17.51
	filet	28.95			28.95	28.75

TABLE 3. RETAIL PRICES FOR FISH AND SEAFOOD IN THREE SUPERMARKETS ON MARTINIQUE, SEPTEMBER 200. PRICES IN EUROS/KG. EXCHANGE RATE EURO 1.007: US\$.

Product	Presentation	Cluny Cora	Leader Price	Carrefour	Average (Euro/kg)	Average (US\$/kg)
Seabob				4.96	4.96	4.93
Prawn	60/80 ct, 400 g		7.15	7.65	7.40	7.35
Fresh-water shrimp			13.95		13.95	13.85
Tuna	slice			4.88	4.88	4.85
Snapper	whole		8.35	7.55	7.95	7.89
Billfish				5.96	5.96	5.92
Mackerel	whole	3.55	2.55	2.89	3.00	2.98
Cod	steak			9.86	9.86	9.79
Dorado	filet			11.85	11.85	11.77
Sardines		3.65			3.65	3.62
Whiting	filet		7.45	8.33	7.89	7.84

TABLE 4. RETAIL PRICES FOR HOT SAUCES AND PRESERVES IN THREE SUPERMARKETS IN THE FORT DE FRANCE-LAMENTIN COMMUNITIES ON MARTINIQUE, SEPTEMBER 2002. PRICES IN EUROS. EXCHANGE RATE: EUROS 1.007: US\$.

Product	Brand	Flavor	Units (ml)	Cluny Cora	Leader Price	Carrefour	Average (Euro/ /unit)	Average (US\$/ /unit)
Hot sauce	Barons		163	1.97		1.77	0.011	0.011
	S.P.I.C.E		1000			2.43	0.002	0.002
	Tabasco		57	2.58		1.54	0.036	0.036
	Bello pepper sauce		147	1.90		1.66	0.012	0.012
Preserves			(g)					
	Aurore	red papaya	1000			4.56	0.005	0.005
		passion fruit	1000			4.56	0.005	0.005
		Barbadine	1000			4.56	0.005	0.005
	Confiture	Goyane "extra"	230		1.19		0.005	0.005
	Bonne Maman	Goyane "extra"	370		1.49		0.004	0.004
		Goyane gelee	370		1.49		0.004	0.004
		Banane	370		1.50		0.004	0.004

ANNEX III

PUBLICATIONS IN THE EXPORT MARKET SERIES

- BULLETIN No. 1: RAPID RECONNAISSANCE SURVEY OF THE NEW YORK CITY MARKET FOR GUYANESE PRODUCTS, NOVEMBER 2002.
- BULLETIN No. 2: RAPID RECONNAISSANCE SURVEY OF THE TORONTO MARKET FOR GUYANESE PRODUCTS, NOVEMBER 2002.
- BULLETIN No. 3: THE LONDON MARKET FOR GUYANESE PRODUCTS, A RAPID APPRAISAL, AUGUST 2002.
- BULLETIN No. 4: MARKET PROFILE: BARBADOS – A RAPID RECONNAISSANCE SURVEY, FEBRUARY 2003.
- BULLETIN No. 5: MARKET PROFILE: TRINIDAD – A RAPID RECONNAISSANCE SURVEY, FEBRUARY 2003.
- BULLETIN No. 6: MARKET PROFILE: ST. LUCIA – A RAPID RECONNAISSANCE SURVEY, FEBRUARY 2003.
- BULLETIN No. 7: MARKET PROFILE: ANTIGUA – A RAPID RECONNAISSANCE SURVEY, FEBRUARY 2003.
- BULLETIN No. 8: MARKET PROFILE: MARTINIQUE – A RAPID RECONNAISSANCE SURVEY, FEBRUARY 2003.
- BULLETIN No. 9: MARKET PROFILE: GUADELOUPE – A RAPID RECONNAISSANCE SURVEY, FEBRUARY 2003.
- BULLETIN No. 10: MARKET PROFILE: ST. MAARTEN – A RAPID RECONNAISSANCE Survey, February 2003.
- BULLETIN No. 11: THE CARIBBEAN MARKET FOR LUMBER AND WOOD PRODUCTS – A Rapid Reconnaissance Survey. (A compendium volume due the 2nd quarter 2003).
- BULLETIN No. 12: THE CARIBBEAN MARKET FOR FISH AND SEAFOOD – A Rapid Reconnaissance Survey. (A compendium volume due the 2nd quarter 2003).

- BULLETIN NO. 13: THE CARIBBEAN MARKET FOR FRESH FRUITS AND VEGETABLES – A RAPID RECONNAISSANCE SURVEY. (A COMPENDIUM VOLUME DUE THE 2ND QUARTER 2003).
- BULLETIN NO. 14: THE CARIBBEAN MARKET FOR LUMBER AND WOOD PRODUCTS – A Rapid Reconnaissance Survey. (A compendium volume due the 2nd quarter 2003).
- BULLETIN NO. 15: MARKET PROFILE: NORTHERN BRAZIL – A RAPID Reconnaissance Survey (Expected in July 2003).

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