

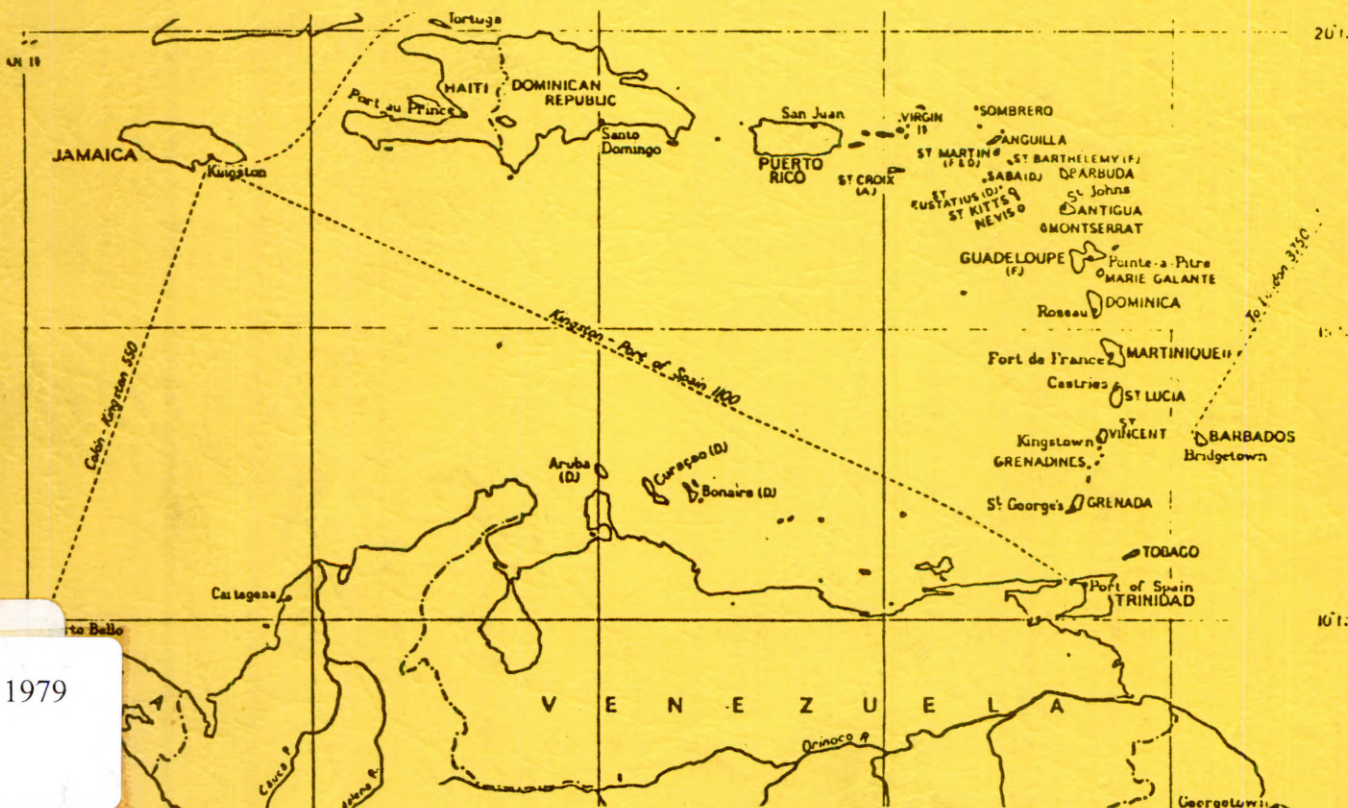
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AN AGRICULTURAL MARKETING STRATEGY
FOR THE CARIBBEAN
1980's

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AN AGRICULTURAL MARKETING STRATEGY FOR THE CARIBBEAN FOR THE 1980'S

SUMMARY

The island economies of the Caribbean were characterized by small-scale traditional marketing intermediaries up until the early 1960's, when the larger countries established marketing corporations, as the "solution" to the internal marketing problems. After 15 years the internal marketing systems continue as before.

For the past 5 years IICA has been promoting and carrying out studies of both the traditional and the modernized marketing systems in the Caribbean. Results of this systematic research has identified a series of marketing problems at three major stages of the marketing system.

At the assembly stage the major problems are related to the marketing of farm inputs and basic consumer goods as well as agricultural produce. The basic problem is the high level of dependency on traditional intermediaries resulting in low-levels of negotiating power for the purchase of consumer items and sale of farm produce.

At the leveling-out stage the principal problem is the lack of well trained personnel in the major marketing institutions, resulting in inadequate marketing services and inefficient management of agricultural produce.

At the distribution stage the problems are related to insufficient and inadequate marketing infrastructure and unorganized intermediaries.

In an attempt to eliminate or reduce the intensity of the marketing problems, and as a result of IICA experiences over the past five years, an Agricultural Marketing Strategy has been developed for the Caribbean Region which will be implemented in two parts: A national strategy and a complementary regional strategy.

The basic elements of the national strategy include setting up Integrated

This One



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Rural Marketing Service Centers, which will serve to channel marketing services to organized farmers and assist them in opening up direct marketing channels to diverse retailers and end consumers. The other major component of the strategy, is an intensive training program for Internal Marketing Institution personnel.

The Regional Strategy consists of establishing an IICA team of marketing specialists charged with implementing a regional training and technical cooperation program to support national marketing programs and coordinate regional marketing activities among the diverse development institutions of the region.

The cost of implementing the Regional Strategy over the 1980-85 period is \$890,000.

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AN AGRICULTURAL MARKETING STRATEGY FOR THE CARIBBEAN FOR THE 1980'S

I. INTRODUCTION

When we speak of the Caribbean we are referring to those island economies (Cuba excluded) situated along a 900 nautical mile crescent extending from Jamaica in the Northwest to Trinidad in the South east and on to Guyana and Surinam on the mainland of South America. These islands (omitting Guyana and Surinam) contain approximately 107,000 Km² of land area which supports a total population exceeding 18 million, yielding a population density of 166 persons per Km². The people of the Caribbean fall into three broad cultural groups - English, French and Spanish - influenced strongly by African, and to a lesser degree, east indian customs.

There is probably no other group of countries or associated economies in the world as dependent upon external agricultural marketing systems as these island economies 1/ of the Caribbean. Marketing problems in the diverse countries of the globe are not unlike, however, in no other region are the experiences and problems as similar as those found between the Caribbean islands. For these reasons it is felt that a regional marketing strategy for the Caribbean is not only important but is absolutely necessary if agricultural development is to take place. Up until now attempts to improve the agricultural marketing systems of the Caribbean can be likened to "pushing on a string", 2/ with individual efforts being oriented towards specific problems in specific countries, with little or no interchange of knowledge and experiences. A Regional Agricultural Marketing Strategy, on the other hand, would be more like pulling on a string, and would facilitate economies of scale in training human resources and a free interchange of information, national expertise and marketing strategies and experiences.

1/ Guyana, Surinam and Belize although on the mainland have many characteristics of island economies being surrounded by impenetrable jungle.

2/ Borrowed from Tom Bennet.

For a strategy of any kind to be successful, of course, it must first be implemented. To be implemented it must have the support of host country nationals who view the strategy as a possible solution to their countrys needs. In todays Caribbean it is unlikely that there exists an island which has not declared agricultural marketing as a priority problem which must be solved if development is to take place (1, 12).

In the following paper the Caribbean marketing systems will be described, the common marketing problems will be identified, and national and regional strategies will be proposed to eliminate or reduce these problems. Finally a profile for a project for regional cooperation in agricultural marketing will be submitted.

II. MARKETING SYSTEMS IN THE CARIBBEAN

Marketing systems in the Caribbean can be summarized into two broad categories: traditional systems dating from the 16th century, and modernized systems dating from the 1960's.

2.1 Traditional Marketing Systems

Up until recent times marketing systems in the English and French speaking islands of the Caribbean were basically traditional systems characterized by the "Huckster" in Guyana (15) and some of the smaller islands, the "Hawker in Barbados (9), the "Higgler" in Jamaica (14) and the "Madam Sara" in Haiti (8). These systems function similarly in all of the countries with the following characteristics:-

1. Predominantly middle aged and older women operating with limited capital.
2. Small amounts of produce handled, often on the order of 100 lbs.
3. Basic services provided are assembly and transport, however, in some cases harvesting and grading service, sales on consignment and even credit is provided.
4. Tendency to purchase directly at farm gate from individual farmers.

5. High degree of mobility (enter and exit from trade) depending on national economic conditions.
6. Product and geographical specialization.
7. Inadequate storage facilities at selling point, and
8. Large number of intermediaries with small marketing margins.

In any one country these traditional marketing women can be divided into sub-groups depending on: their level of operation, wholesale or retail; their geographical location, farm or urban; and the services they provide, transport or storage.

In the case of the Dominican Republic, the principal Spanish speaking country with a free market economy, the characteristics of the traditional agricultural marketing system vary substantially from those of the English and French islands, however, the problems are basically the same (13). In the Dominican Republic:

1. The traditional intermediaries are male truck drivers, (camioneros) often operating with considerable capital.
2. Volumes of produce handled varies from a pickup load to a full truck load.
3. Services provided include assemble, transport, information and credit.
4. There is less mobility of entry and exit from the trade and
5. The "camioneros" marketing margins are frequently substantial.

2.2 Introduction of Modern Marketing Systems

In the early 1960's many of the island economies of the Caribbean decided that the marketing systems must be improved, thus prompting the creation of the Barbados Marketing Corporation in 1961; the Jamaican Agricultural Marketing Corporation in 1963; the Guyana Marketing Corporation in 1964, the Central Marketing Agency in Trinidad/Tobago in 1964, and the Price Stabilization

Institute 1/ in the Dominican Republic in 1969. Only Haiti, 2/ of the larger islands, failed to establish a Marketing Corporation.

The basic characteristics of these marketing corporations are:

1. Large numbers of Government employees and corresponding bureaucracy.
2. Frequent turnover of decision making personnel.
3. Considerable infrastructure including some or all of the following: grain silos, warehouses, cold storage facilities, assembly centers and administrative offices.
4. Poor management of infrastructure and personnel.
5. Inadequate training of technical staffs, and
6. Excessive post-harvest losses.

Although it is not documented, it is felt that the marketing corporations were established, in part, to compete with and to eliminate the traditional intermediaries, who have become the scapegoats for such marketing problems as:

- low prices for the small farmers
- inflated prices for the consumers
- poor quality produce
- high post-harvest losses and
- undependable supply

Fifteen years have now gone by since the creation of the marketing corporations and the Governments of Jamaica, Trinidad/Tobago, Guyana and Barbados are asking the same question: What is wrong with the internal marketing systems? Haiti which did not attempt to compete with its Madam Sara is asking the same question, as is the Dominican Republic which was experimenting with its own model.

1/ Instituto Nacional de Estabilizacion de Precios (INESPRE)
Follows a model quite different from the model used in the English speaking countrys.

2/ In 1976 Haiti established a Marketing Division within the Ministry of Agriculture.

An idea of the effectiveness of these marketing corporations can be had by the following quotation from a Governmental Publication (10):

"This statutory corporation has enjoyed a somewhat unspectacular career since the commencement of its operations in 1963. Since its inception the Corporation has been operated both as a trading organization, buying and selling produce in competition with private enterprise, and in other cases in providing a service. In all of its operations the Corporation has made financial losses and each year of operation has sustained deficits of some magnitude. At present, the accumulated deficit is equivalent to \$30 for each member of the population".

There is no need to mention the name of the marketing corporation in question since the same paragraph holds true for Jamaica, Barbados, Guyana, Trinidad/Tobago and, with minor adjustments, even the Dominican Republic.

III. PROBLEMS OF MARKETING AGRICULTURAL PRODUCE

For the past 15 years national and international institutions have recognized the importance and need for improving marketing systems on a national basis. Following the traditional approach, most of the emphasis has been placed on infrastructure as though cement silos, warehouses, new markets, roads and cold storage facilities could, by themselves, solve the marketing problems. In some cases these "solutions" have concentrated on specific crops or specific geographical regions of a country. What all of these proposed solutions have in common is that they are restricted to specific problems and do not focus on the internal marketing systems as a whole. This is a serious mistake but one quite commonly made. Results of such narrow sighted programs are readily visible throughout Latin America and the Caribbean. To mention a few common examples:

1. Cold storage facilities in rural and urban areas lying idle for lack of demand, excessive operating costs or inadequate management skills.
2. Cement silos for storing grains not in operation for inadequate maintenance, lack of skilled operators or simply because potential use, e.g., storing paddy rice, does not correspond with Government marketing policy, e.g., storage and distribution of white rice; and

3. Public markets, producers markets and even central markets inadequately used due to improper design, location or ambitious planning.

In order to avoid this type of mistake when implementing marketing strategy, it is necessary to have a detailed understanding of the basic marketing problems and their interrelationships. It is felt that after five years of diagnostic research (5) in the Caribbean region, IICA now has sufficient data to define the basic marketing problems at the three principle stages of marketing systems. This basic data is derived from over 50 IICA publications (see annex 1) on the internal marketing systems in Haiti, Dominican Republic, Jamaica, Guyana, Trinidad/Tobago and Barbados, as well as miscellaneous publications by other regional and international institutions attempting to cope with marketing problems in the Caribbean.

If a regional marketing strategy is to be effective, it must be based on a sound understanding of common marketing problems. Such knowledge is now at hand.

Marketing problems can be analyzed by diverse methods, the method which has been selected for this paper has developed naturally as a result of the diagnostic research of marketing systems in the Caribbean. Throughout this research it has been a re-occurring fact that agricultural marketing problems nearly always fall into one of three categories:

- Those that occur in the rural areas and are normally associated with assembly. These problems are best understood viewed through the eyes of the farmer and the intermediary.
- Those that are a result of inefficient management of marketing corporations and inadequate marketing services. These problems should be studied from three points of view: farmer, intermediary and marketing institution personnel.
- Those that occur during the urban distribution of food. These problems should be considered from the point of view of wholesalers, retailers and consumers.

These three categories can be summarized as:

ASSEMBLY _____ LEVELING OUT ^{1/} _____ DISTRIBUTION

3.1 Assembly

When we refer to marketing problems at the assembly level, we are referring to those problems encountered by the small farmer, or at least seen from the small farmers point of view (4). They include problems related to the marketing of agricultural inputs, the marketing of basic consumer items and the marketing of his crops (marketing is much more than simply selling produce).

3.1.1 Small farmers problems related to input distribution.

Small farmers normally consume small amounts of agricultural inputs. This, normally causes problems such as:

- a) Basic inputs unavailable on a timely basis in rural areas.
- b) Some important unputs not available at all, in rural areas.
- c) High costs of inputs.
- d) Lack of quality control.
- e) Inadequate information (extension) in use of the inputs.
- f) Inputs are purchased in very small quantities thus few economics of scale.

3.1.2 Small farmer problems related to availability of basic consumer goods.

The small farmer due to his semi-isolation often has difficulties in obtaining basic food items required for daily survival. The problems related to this area, are the following:

- a) Availability of basic food items in rural communities is often inadequate and partial.
- b) Due to higher transport costs and reduced competition, rural consumers normally pay higher prices for basic food items.
- c) Demand for basic foods in rural areas is often low thus eliminating possible economies in bulk purchases.

^{1/} Assembly and distribution are well understood. Leveling out is the intermediate stage where the product may be stored, processed, packaged, etc., in an attempt to "level out" supply.

3.1.3 Small farmer problems related to the marketing of his produce.

The most important time each year in the life of the small farmer, is probably that of those periods when he sells his harvest. At this point, his decision making process begins anew with basic decisions as to what consumer goods to purchase, what animals (investments) to purchase, what crops to plant in the following period, or as is often the case: How to repay production credit to the agricultural bank, intermediaries or friends? All of these decisions and more, depend upon the small farmers ability, or luck, in obtaining a fair price for his produce. Some of the factors or problems which limit the small farmers ability to negotiate a fair price are the following:

- a) Reduced scale of production and thus small volumes to be marketed.
- b) Seasonality of production, resulting in scarcities and gluts brought about by poor programming, causes excessive price variation.
- c) Number of potential buyers for any one small farmer, are very limited.
- d) Difficulty in identifying new markets and thus by-passing traditional intermediaries.
- e) Lack of decision making information on prices, markets, competitors, etc., at the farm level.
- f) Insufficient infrastructure at the rural level for storing agricultural produce for short periods of time.
- g) System of weights and measures controlled by intermediaries to the disadvantage of the small producer.
- h) Extreme dependency upon the intermediary for market information, credit, transportation and other marketing services.

In summarizing the marketing problems of the small farmer at the Assembly stage in the marketing system we might conclude that: The small farmer has a very low level of negotiating power in the sale of his produce, increased due to insufficient Governmental marketing services and dependency upon traditional intermediaries.

3.1.4 Assembly problems from another view point.

In analyzing the marketing problems at the assembly stage of the systems, it would be incomplete if we did not mention problems as seen thry the eyes of the traditional intermediary or the Government marketing institution. Since the problems in both cases are basically the same, they may be treated as one. The principal problems for the intermediaries, are the following:-

- a) Volume of produce available at any one farm is very small thus increasing costs of assembly function in terms of time and transport costs.
- b) Quality of produce is often lowered by farmers attempt to increase weight (adding water) or volume (adding soil, rocks, sticks, etc.).
- c) Often difficult to plan assembly because the farmers may not harvest as planned or they may seek alternative markets offering better price conditions.

3.2 Leveling-Out

Once the agricultural produce leaves the assembly stage and before it enters the distribution stage, it is considered to be in the leveling-out stage (6,11) where it may be transported, stored, transformed, processed or whatever. In analyzing the problems which occur at the leveling-out stage, it is beneficial to distinguish between those affecting the traditional marketing systems and those affecting the modernized (Government institutions) systems.

3.2.1 Problems affecting or caused by the traditional systems at the leveling-out stage.

Due to the characteristics of the traditional marketing systems (see 2.1) of limited capital, small volume and inadequate storage facilities, the leveling-out stage under this model, is very short. The major problems identified include:

- a) High cost of transport due to small volumes.
- b) Mismanagement of produce while being transported to urban areas: Product packaged inadequately, often left in sun, improperly stacked on trucks and handled roughly. All of these factors tend to stimulate product deterioration and increase post-harvest losses.

- c) Improper storage facilities in and around public markets. Once the produce reaches the urban areas, and before moving into the distribution stage, it is often stored for short periods of time in rudimentary warehouses, on the street, or in trucks, where it receives only minimal attention and is often negatively affected by the elements (sun, rain) rodents and insects.

3.2.2 Problems affecting or caused by the modernized systems at the leveling-out stage.

As mentioned above, the more modernized marketing systems in the Caribbean are characterized by:

- Government bureaucracy
- Frequent turnover of personnel
- Significant infrastructure
- Poor management
- Inadequate training, and
- Excessive post-harvest losses

Most of the marketing problems which affect modernized systems are related to one or more of these characteristics. The principal problems are the following:

- a) Lack of clear definition of policies and objectives: e.g., subsidies, and welfare approach vs. commercial approach.
- b) Inexistent or inadequate planning and programming function.
- c) Excessive number of employees with very few trained in marketing or with marketing experiences.
- d) Over extension of activities, including assembly, storage, wholesale and even retail.
- e) Poor management of basic infrastructure, resulting in high level of post-harvest losses.
- f) Excessively high operating costs.
- g) Lack of control of stocks and inventories, which stimulate pilferage.
- h) Little coordination with other marketing organizations or institutions.

- i) Failure to help small farmers develop links directly with end-users (industries, exporters) or retailers, thereby shortening the leveling-out stage.

3.3 Distribution

As with the previous case, the problems related to the distribution stage can be identified according to their impact upon the traditional marketing systems or the modernized systems.

3.3.1 Problems affecting or caused by the traditional system at the Distribution Stage.

Once the traditional intermediaries (higglers, hucksters, hawkers, camioneros, madam saras) reach the wholesale and retail markets (or street corners) with their produce, their basic problems are related to one or more of the following areas (7, 14, 9, 13):

- a) Lack of space (legal or otherwise) to wholesale or retail their produce.
- b) Lack of space to store their produce from one day to the next.
- c) Danger of pilferage and theft.
- d) Unsanitary conditions for produce.
- e) High cost for transporting small volume of produce from wholesale market to point of resale.

3.3.2 Problems affecting or caused by the modernized system at the Distribution Stage.

The modernized systems (marketing corporations) often play an active role in the Distribution Stage including direct sales of produce through wholesale markets, retail stores and/or mobile retail units. The principal problems at this stage, can be summarized as follows:

- a) Government participating role at the retail level is often a function of surplus produce and thus difficult to provide reliable service.
- b) Due to high operating costs, prices at retail level are often higher than those offered in traditional channel, unless subsidized by the Government.

- c) Price subsidies often benefit higher income groups, who are principal consumers of fresh fruits and vegetables.
- d) Post-harvest losses are exceedingly high at wholesale/retail level, resulting in increased operating costs.
- e) Modernized systems tend to over emphasize the importance of infrastructure, resulting in misallocation of resources.
- f) Policy makers often make decisions about marketing and market infrastructure without having sufficient information on the subject.
- g) The export potential for selected non-traditional crops is often over-looked.
- h) Agroindustry is often promoted, based on seasonal surpluses.

Diagnostic research (annex 1) in the Caribbean has confirmed time and again that the problems summarized above are real ones, common to at least the six countries (Dominican Republic, Haiti, Jamaica, Guyana, Trinidad/Tobago and Barbados) where IICA maintains offices.

IV. MARKETING STRATEGIES

Now that the marketing problems have been defined, the following step will be that of STRATEGY definition to reduce or eliminate these problems. The "Agricultural Marketing Strategy for the Caribbean", will be presented in two parts:

First: A strategy for attacking the marketing problems summarized above at the three distinct stages of the marketing system. This strategy, of course, must be applied at the country level.

Secondly: A regional strategy to facilitate the implementation of national marketing strategies.

4.1 Country Level Strategy

The purpose of a country level marketing strategy is basically that of defining the methods or approach of turning an existing inadequate marketing system into a more adequate one. With the detailed understanding that we now have of the existing marketing systems and the overall marketing problems in the

Caribbean, it is not a difficult task to design realistic and more efficient marketing systems.

Figure number 1 presents a simplified version of the traditional/modernized marketing system, characteristic of most of the larger islands in the Caribbean as well as several smaller ones. It shows a large number of small producers selling mainly to traditional intermediaries (wholesalers) who work out of large towns or cities and are the principal purveyors of (inadequate) marketing services (credit, information, transport). Under this system there is a concentration of marketing functions; such as, grading, storage, processing, wholesaling and retailing, in urban areas. Power is concentrated at the wholesale level where price determination is influenced substantially. Retailers include public markets, supermarkets and traditional small community food stores. The Government marketing corporations purchase only small percentages of the farmers production and quite frequently only a reduced number of products. This produce is then sold to wholesalers, retailers and often directly to the consumers at subsidized prices.

Figure number 2 shows what could be the modified version of the existing system after applying the proposed country level strategy. In this case we see that the small farmers have become organized and participate actively in the marketing of their produce through Rural Agro-Industry and Integrated Rural Marketing Service Centers (IRMSC). These IRMSC's also provide farm inputs, technical assistance and consumer goods, directly to the organized farmer groups. The Government Marketing Institutions will have established their own permanent or mobile purchasing stations in rural areas which will provide basic assembly functions to complement those of the IRMSC's which are operated by organized farmer groups.

In the Leveling-out Stage the Government Marketing Institutions will be strengthened and will begin playing a key role in stabilizing prices and pro-

FIGURE 1: SIMPLIFIED VERSION OF TYPICAL MARKETING SYSTEM IN CARIBBEAN

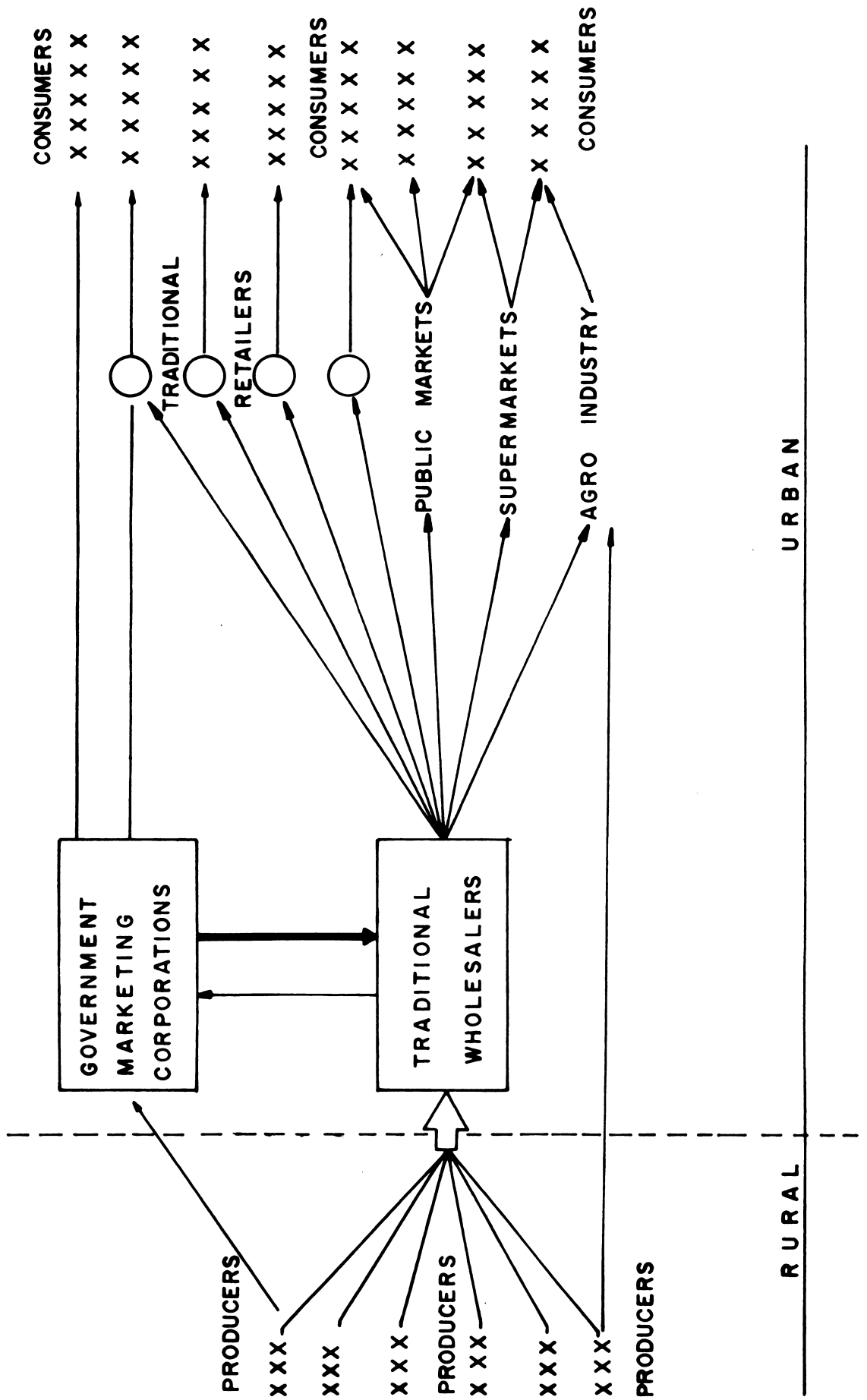
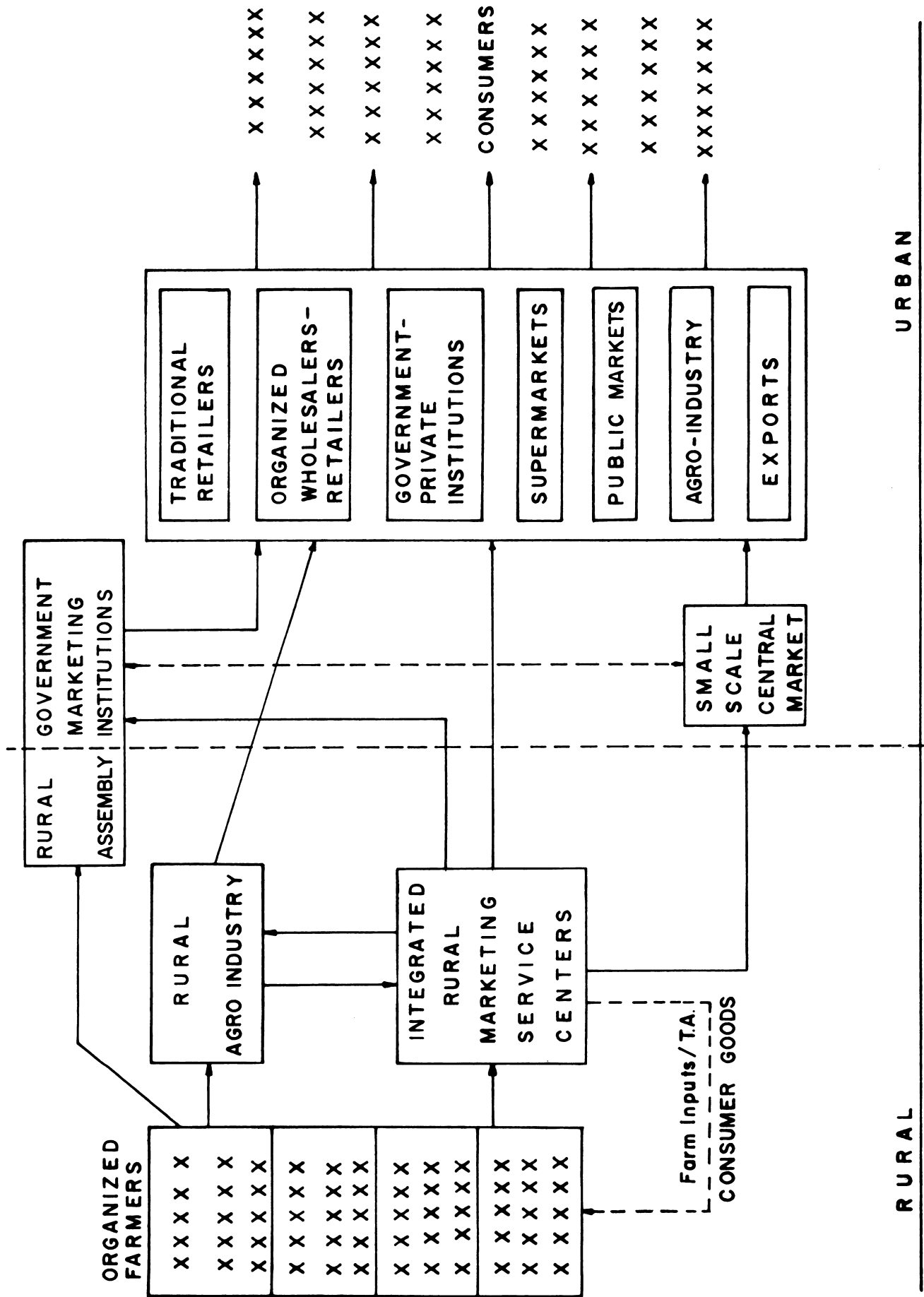


FIGURE 2 : MODIFIED DEVELOPMENT ORIENTED SYSTEM AFTER STRATEGY APPLICATION AT NATIONAL LEVEL



viding marketing services in such areas as information, credit, transport, storage, training and extension, while at the same time allowing traditional intermediaries, who are providing services, to operate.

Those traditional intermediaries who are presently adding to marketing margins by simply manipulating information will be eliminated. The marketing channels will be shortened by more direct participation of the organized farmer groups who will begin selling directly to traditional and organized wholesalers/retailers, Government and private institutions (hospitals, hotels, etc.), supermarkets, agro-industry and exporters. A small scale central market will be established which will facilitate price determination and will act as a coordination center for Government Marketing Institutional Services.

In comparing figures 1 and 2 we see that the application of the National Marketing Strategy will have the following impact:

1. Organized groups of small farmers will:
 - be able to program production
 - offer increased volume sales
 - obtain economies thru bulk purchases of inputs and basic consumer items
 - facilitate extension and training activities, and
 - have increased power or negotiation with traditional intermediaries
2. The Integrated Rural Marketing Service Centers and Rural Agro-Industry will:
 - transfer marketing functions such as grading, storage, processing and wholesale from urban to rural areas
 - stimulate use of standard weights and measures
 - increase employment opportunities in rural areas
 - guarantee more active participation of organized farmers in the marketing of their produce
 - improve nutrition for rural population and reduce costs for consumer goods.

3. Restructured and efficient operating Government Institutions will:
 - facilitate production and marketing planning
 - help stabilize prices
 - reduce post-harvest losses, thus increasing food availability and
 - improve basic marketing services for the farmers, intermediaries and the final consumer
4. Improved infrastructure and organization of urban food distribution will:
 - eliminate unnecessary intermediaries
 - reduce food costs, especially in marginal areas of larger cities
 - improve quality of available produce, and
 - increase the number of alternative markets for organized farmers

4.2 Institutional Organization

With the general development strategy defined it is then possible to identify the types of marketing institutions necessary for strategy implementation.

In other countries of Latin America, attempts to create super marketing institutions, responsible for all aspects of agricultural marketing, have generally been unsuccessful. The trend elsewhere, as in the Caribbean, seems to be towards establishing one normative institution (The Ministry of Agriculture), responsible for the definition, orientation and evaluation of marketing policies and the provision of basic marketing services; such as, price information, marketing extension, marketing studies, etc. Most countries have a second institution at the operations level responsible for developing the internal marketing system. (The Marketing Corporation described above). In those countries with export potential, a third institution has frequently been created to promote and stimulate the export of both traditional and non traditional products. Guided by overall development strategy and specific objectives of the

Agricultural Sector, each institution is normally responsible for defining its policy instruments (inputs, prices, credit, extension, training, assembly, market place construction, etc.) and its methods.

The implementation of the national marketing strategy presented here will thus require the creation and/or strengthening of three government institutions:

- The Ministry of Agriculture
- The Internal Marketing Institution
- The External Marketing Institution

Since it is impossible to have an effective export marketing program without first developing the internal marketing system, most of the emphasis in this strategy will go towards strengthening the Ministries of Agriculture and the Internal Marketing Institutions.

4.3 Elements of the National Marketing Strategy

The general strategy presented in figure 2 is not an attempt to introduce new marketing systems but to modify the existing systems to make them work more effectively. Diagnostic research has helped us to identify the basic problems of marketing agricultural produce, and interviews and workshops with farmers, intermediaries, industrialists and government marketing institution employees have allowed us to identify solutions to the problems at the distinct stages of marketing (assembly, leveling-out and distribution). These solutions are summarized below:

4.3.1 Strategy at Assembly Stage.

Assuming that certain priority is given to improving the marketing systems in benefit of the small farmers, then the first step in any strategy must be that of the identification of those farmers needing and wanting marketing services.

Assembly and marketing service programs should begin with existing farmer

associations, cooperatives, land reform schemes or other groupings of small farmers requiring marketing services. These groupings are easily identified thru an inventory, which may also identify specific needs. Once the clients for marketing services have been identified, the next step is to design specific programs for their particular needs. Such programs can be combined and implemented thru Integrated Rural Marketing Service Centers (3).

The Integrated Marketing Service Centers (IRMSC) are as the name implies, "CENTERS" with minimal infrastructure, operated and managed by organizations of small farmers, which provide marketing services including the channeling of Governmental Services from the Ministry of Agriculture and marketing institutions.

The general objectives for the IRMSC's are to improve the standards of living of the small farmer by:

- a) Increasing his returns thru improved power of negotiation with traditional intermediaries.
- b) Increasing his returns by creating new marketing channels direct to retailers and consumers (thus reducing marketing costs and prices to the final consumer as well).
- c) Increasing employment in rural communities by transferring marketing functions such as, storage, packaging, transformation, grading, processing, etc., from the urban areas where it now occurs.
- d) Reducing the costs of agricultural inputs.
- e) Reducing the costs of basic consumer items at the rural level.
- f) Improving production and marketing skills.

Each IRMSC is organized according to the basic felt needs of the farmer association, or federation, and is designed with active participation of the group leaders, who continue participating in all aspects of the project, from construction to management of the basic infrastructure.

Each IRMSC, depending on the needs of the community, will have one or more of the following elements:

a) Assembly and storage infrastructure, offering some of the following services:

- Price and Market Information.
- Marketing extension services.
- Production planning service.
- Marketing credit.
- Technical assistance in grading, handling, packaging, processing, etc.
- Training in administration/management.
- Others that may be required.

b) An agricultural input store annexed to the service center providing:

- Inputs required in the community on a timely basis.
- Quality control of inputs.
- Fair prices.
- Training in use of inputs.

c) A consumer store annexed to the service center offering:

- Basic consumer foods most commonly consumed in the community.
- Fair prices.

A Government extension agent trained in marketing would be assigned to each IRMSC. The input and consumer stores would be operated on a commercial basis but would be able to sell at prices equivalent to urban store prices due to economies obtained in bulk purchases made at the national level for all IRMSC stores.

The assembly centers will sell to traditional intermediaries, the Internal Marketing Institution, or more direct channels including organized retailers, institutions or exporters.

The effectiveness of these rural centers will depend upon the quality of

services they can provide. This will require, therefore, improved marketing services from the Ministry of Agriculture and the Internal Marketing Institution, including the following:

- Agricultural marketing credit.
- Price and market information.
- Marketing extension service.
- Training in administration and management.

4.3.2 Strategy at Leveling-Out Stage.

In considering problems at the Leveling-out stage, the emphasis will be upon strengthening the Governmental Marketing Institutions. Since nearly all of the institutional problems identified thru diagnostic research can be directly traced to inadequately prepared marketing institution employees, the proposed strategy to eliminate this bottleneck is one of training people from key institutions in priority areas.

The training program will include short courses on marketing, workshops, seminars and in-service training at home and abroad for Ministry of Agriculture and Internal Marketing Institution Personnel.

a) Ministry of Agriculture.

The Ministry of Agriculture will be able to play a key role in the development of the internal marketing system by providing those services which it is best suited to provide (market research, price information, extension, etc.) and maximizing its role as policy maker and coordinator so as to stimulate other marketing institutions to provide the marketing services they are charged with providing. To provide these services training will be required in the following areas:

- Formulation of agricultural marketing policy and implementation.

- Project preparation and evaluation.
- Market information and intelligence.
- Marketing extension services.
- Marketing of agricultural inputs.
- Operation and management of Integrated Rural Marketing Service Centers.
- Organization and training of farmers in marketing activities.

o) Internal Marketing Institution.

The internal marketing institution will be the primary marketing institution at the operations level. To improve its efficiency an intensive training program will be required in the following areas:

- Formulation of marketing policies, strategies, planning and programming.
- Operation and management of basic infrastructure.
- Control and management of inventories.
- Post-harvest loss-reduction.
- Classification, norms and standards.
- Laboratory analysis.
- Recruitment and training of personnel.
- Others as identified.

To maximize the interchange of experiences and to minimize costs, the training activities should be closely coordinated with training programs in marketing being implemented in other parts of the Caribbean and the Hemisphere.

4.3.3 Strategy at Distribution Stage.

Distribution of agricultural produce, of course, is required in rural areas as well as in urban areas. The strategy proposed for rural distribution of basic consumer goods was included as part of the Assembly strategy - Integrated Rural Marketing Service Centers.

In the case of urban distribution the strategy can be sub-divided into three areas: Organization of traditional intermediaries, new or improved infrastructure, and identification and promotion of new markets.

a) Organization of Intermediaries.

Some of the islands of the Caribbean have organizations of wholesalers and retailers, others have a potential for such organizations. Where conditions permit, Government institutions will promote chains or associations of retailers and wholesalers as direct outlets for produce marketed by the Internal Marketing Institutions and the IRMSC's. This will tend to strengthen the traditional marketing system while at the same time making it more efficient --volume purchases and economies of storage and transportation.

b) New or Improved Infrastructure.

In some countries of the Caribbean public retail marketplaces play an important role in the urban distribution of food. In others, wholesale markets are more important. In nearly all cases the basic infrastructure is inadequate for present needs. Complementary infrastructure for short term storage at or near the public markets is also inadequate. This element of the strategy would be to identify, prepare and implement projects to supply new urban marketing infrastructure adapted to the real needs of the modified marketing system. Potential projects will include:

- Improvement of existing markets.
- Construction of a central wholesale market.
- Construction of producer or export market.
- Storage facilities for organized intermediaries.

Training in the operation and administration of the new infrastructure would also be included.

c) Identification and Promotion of New Markets.

Through the organization of the small farmers and the creation of integrated Rural Marketing Service Centers, agricultural produce will be marketed in larger volumes and on a more dependable basis. This will open the door for the promotion of producer-buyer contracts with agro-industry, hotels, supermarket chains, organized intermediaries, exporters, foreign purchasers, etc. This part of the strategy will stress the identification and promotion of such agreements and the technical assistance necessary at the IRMSC's to meet their commitments.

The small scale Central or Farmers market will act as a clearing house for distribution of IRMSC produce in the urban areas.

The agricultural marketing strategy to be applied on a national basis is summarized in Figure 3. The national strategy is oriented towards improving the internal marketing system as a whole, concentrating on the solution of basic marketing problems affecting most marketing systems in the Caribbean.

4.4 Regional Level Strategy

Up to this point we have said that, although there exists considerable cultural differences between the Caribbean islands, their experiences in agricultural marketing and their basic marketing problems are very similar.

It has in-turn been suggested that these marketing problems can be solved, or at least partially eliminated, by applying a common marketing strategy at the national level (see 4.3).

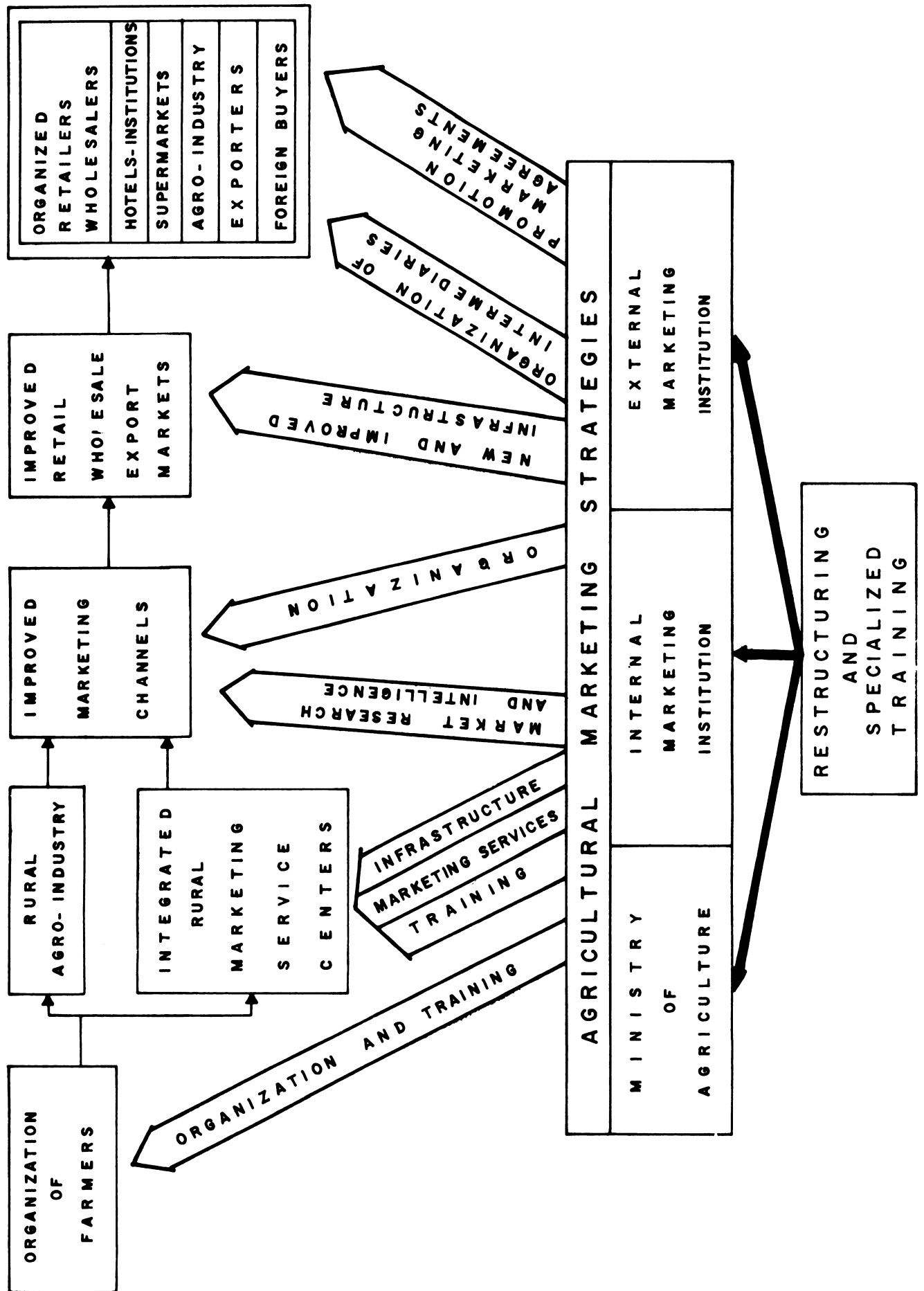
4.4.1 Why a Regional Strategy?

If the marketing problems can be solved at the national level by applying the strategy presented above, then why do we need a Regional Marketing Strategy for the Caribbean in the 1980's? This question can best be answered by looking at actual marketing programs in individual countries of the Caribbean in 1979.

- Jamaica: Combined World Bank, AID, and IDB loans for more than 15 million dollars being negotiated and implemented primarily for construction and improvement of public markets.
- Haiti: Canadian International Development Agency, multi-million dollar grants and loans with a large percentage ear-marked for infrastructure, including grain silos although no grain surpluses are foreseen in the near future.
- Dominican Republic: Approximately one million dollar AID loan for improving Secretary of Agriculture's marketing services, including one half-million dollar program for setting up 15 integrated rural service centers with a second stage \$4 million program on the drawing board.
- Barbados: Two year IICA technical cooperation agreement to strengthen marketing institutions to begin in mid 1979.
- Guyana: Multi-million dollar IDB food and crop production loan, including several million to improve the internal marketing system. The largest percentage is ear-marked for market infrastructure.
- Eastern Caribbean: The Caribbean Development Bank has financed a feasibility study for a multi-million dollar project to establish a regional market for farm commodities produced by the smaller English speaking islands (2).

In each case, millions of dollars are being spent to develop different projects and different strategies to solve basically the same types of problems. Once again we are "pushing on strings", attempting to solve complex marketing problems with dollars and infrastructure. A Regional Marketing Strategy would thus be very useful in helping each country analyze its specific problems and develop and implement practical solutions, thus maximizing the use of available experiences and resources, including some of the following:

FIGURE 3 : SUMMARY OF MARKETING STRATEGY AT NATIONAL LEVEL



- loans and grants from lending institutions such as: IDB, World Bank, AID, CIDA, CDB and others.
- International marketing experts assigned to the Caribbean.
- Research and investigative institutions such as CARDI, the University of the West Indies and National Technological Institutes.
- Specialized international or bilateral organizations or institutes, such as The Tropical Products Institute and Commonwealth Secretariat.
- Regional marketing institutions such as the CARICOM Secretariat and the proposed Caribbean Food Corporation.
- Marketing institutions within each country, and
- National marketing specialists presently restricted to activities in only one country.

4.4.2 Elements of a Regional Strategy

The basic objective of a Regional Marketing Strategy for the Caribbean in the 1980's is to optimize the use of available resources to strengthen marketing improvement programs and facilitate the implementation of the marketing strategy presented above on a national level. To reach this objective it will be necessary to develop regional activities in training, technical cooperation, investigation, project preparation, market promotion and coordination.

a) Training

As was pointed out earlier, most of the Internal Marketing Institutions suffer from similar problems which can be traced directly to lack of qualified personnel. Training of marketing institutions personnel was given considerable emphasis in the marketing strategy at the national level presented above. In reality, each of the national marketing programs mentioned in 4.4.1 includes a component for training technical personnel in marketing.

As part of a Regional Strategy, it is felt that much of the training (research methodologies, infrastructure management, institutional analysis, planning

programming, project preparation, etc.) could best be realized on a regional basis, resulting in reduced costs and increased interchange of ideas and experiences.

A regional training program could be established by a coordinating body which would develop seminars, workshops, short courses, and in-service training activities which would be rotated between participating countries and would be complementary to on-going national programs.

b) Technical Cooperation

Under a regional strategy, two types of technical cooperation would be employed. First, the more traditional international specialist who would provide short-term technical assistance for specific problems, e.g., managing cold storage facilities, silos or packing fresh vegetables, etc., and secondly, national technicians employed by national marketing institutions, who would be made available for short-term technical cooperation on a loan basis between institutions. The cost of this type of technical cooperation would be limited to travel expenses and per diem. The benefits would include practical technical assistance and an interchange of ideas and experiences.

The coordinating body for the application of the regional strategy would be responsible for realizing and maintaining an inventory of human resources in, or specialized in, diverse aspects of marketing in the Caribbean. This coordinating authority would also be in charge of recruitment and coordination of the technical cooperation.

c) Investigation

Some countries of the Caribbean are much further advanced than others in respect to basic research and investigation. There is undoubtedly a continued need for further research into both the traditional and modernized marketing systems. These systems can probably be best understood by comparative studies

between national systems, effected on a regional basis.

The Regional Coordinating Group, will participate in the identification of priority areas of study (urban distribution, post-harvest loss reduction, etc) and support organized research and investigative activities.

d) Project Preparation and Management.

It is probably safe to say that available dollar loan resources for marketing activities in the Caribbean exceed worthwhile developmental projects. It is felt that through a Regional Strategy such a situation can be improved, by assisting nationals in the identification, preparation and management of marketing projects oriented towards priority problems of the marketing system as a whole. Emphasis on project preparation, and management will help reduce the traditional dependency upon financing institutions which often stress infrastructure projects, often to the detriment of the island economies.

e) Market Promotion.

As was stated earlier, the economies of the Caribbean islands are very dependent upon exports of traditional and non-traditional agricultural produce. One of the responsibilities of the Regional Coordinating Group would be to promote inter-island trade, in coordination with the CARICOM Secretariat and the soon to be formed Caribbean Food Corporation, and to assist nations identify new market potential outside of the region. Once the IRMSC's are functioning on a national basis there will exist opportunities for direct grower contracts between Puerto Rico and U. S. A. importers and the IRMSC's.

f) Coordination.

The principal element of the Regional Strategy will be that of COORDINATION. Coordination of the Regional Training Program, activities in Technical Cooperation, Investigation, Project Preparation and Management and

Market Promotion. In addition, COORDINATION will be necessary between international bilateral and regional institutions interested in marketing activities and between the national marketing institutions implementing the marketing strategies.

Due to the importance of the COORDINATION activities, it is felt that the Coordinating body should have the following characteristics:

1. It should be part of an established institution with national offices in the larger Caribbean islands.
2. It should offer continuity and stability over a minimum period of 5 years.
3. It's members should have considerable experience and marketing expertise in the Caribbean.
4. It should have a good working relationship with bilateral, regional and international institutions.

4.4.3 Profile of a Project to Finance Regional Strategy.

Objectives:

The general objective of this project is to create conditions on a regional level which will facilitate the implementation of practical and systematic marketing strategies on a national level, oriented towards increasing the efficiency of the national marketing systems.

The specific objectives can be summarized as follows:

- a) Establish a regional training program in marketing which is complementary to on-going national programs.
- b) Promote the organized interchange of regional marketing specialists and coordinate technical cooperation in agricultural marketing.
- c) Standardize research and investigative methods and methodologies used in studying marketing systems and facilitate a free interchange

of information.

- d) Assist in the preparation and implementation of marketing projects to improve the efficiency and operation of the marketing systems.
- e) Facilitate the regional integration and coordination of all marketing activities.

Executing Agency:

IICA will establish a Regional Coordinating Body which will be responsible for Project Implementation in strict collaboration with its six national offices.

Project Description:

This project consists of the financing of two full-time marketing specialists and 60 man-months of specialized marketing consultants over a five year period to implement regional training and technical cooperation activities in support of national marketing projects. It also includes travel and per diem costs for national marketing specialists participating in training programs and short-term consulting activities.

Upon implementation IICA will appoint two full-time marketing specialists to the Regional Project to coordinate and implement the following activities:

- Definition of needs for regional training.
- Implementation of training program.
- Implementation of diagnostic research on a regional basis.
- Inventory of human resources of the Caribbean, with marketing expertise.
- Inventory and description of national marketing projects.
- Identification of potential sources of financing for project preparation.
- Coordination of technical cooperation program, and others.

Project Costs:

The total project cost over a five year period would be approximately US\$890,000 distributed as follows:

Permanent Staff (two specialists 5 years each)	\$400,000
Travel and per diem for permanent staff	50,000
Short Term Consultants (60 man-months)	240,000
Travel per diem for national technicians	50,000
Training activities	50,000
Publications and materials	25,000
Administration costs	75,000
	<hr/>
TOTAL ESTIMATED COST	\$890,000*

Project Financing:

Financed by IICA (one permanent staff and
administration costs) \$275,000**

Other Sources \$615,000

Project Implementation:

Starting Date: January 1980

Phase Out: January-December 1985

Continued IICA Support: 1985-1990

* Author's estimate

** Author's opinion only

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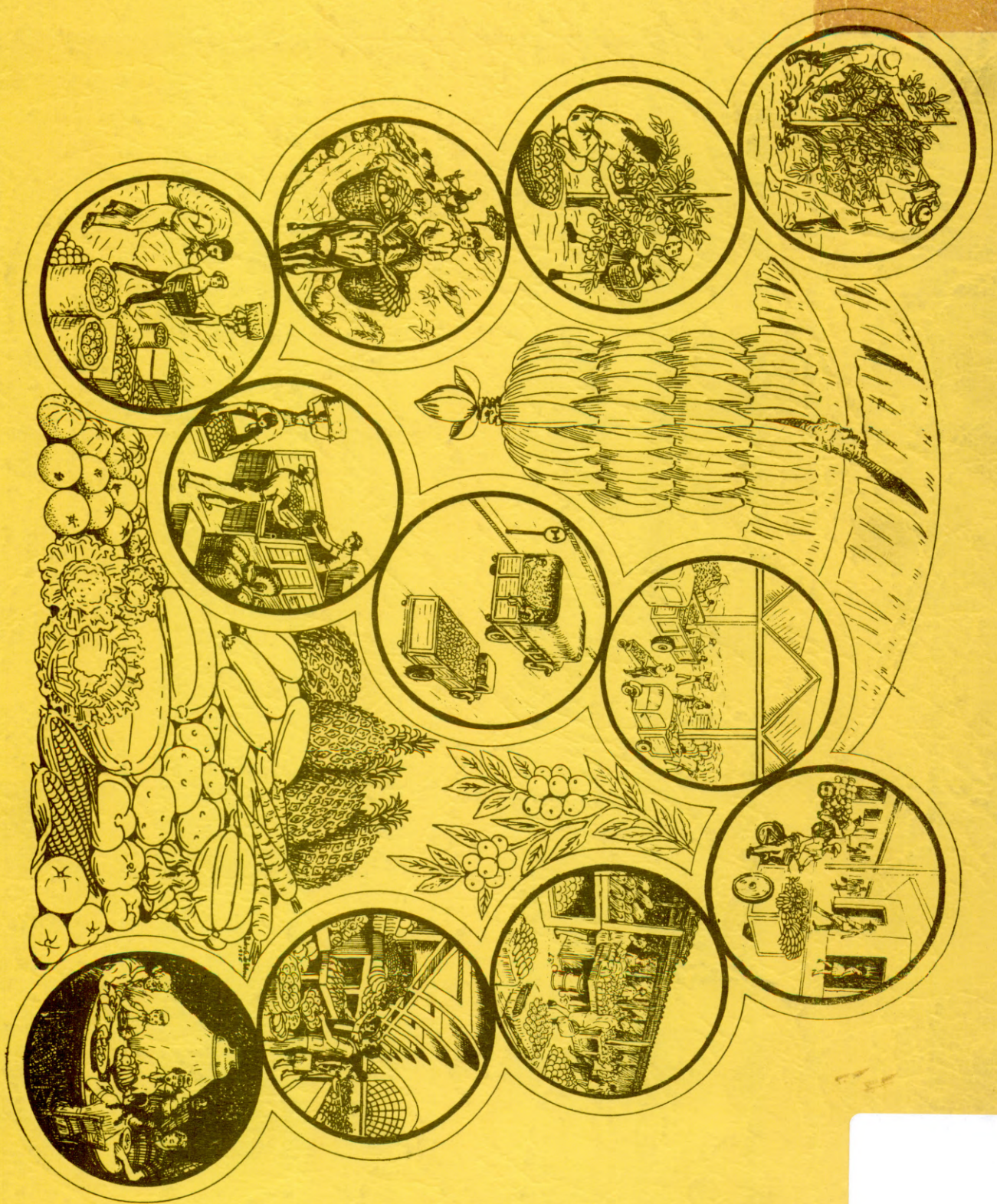
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