

FOREWORD

The Annual Agricultural Review is a publication of the Ministry of Agriculture, Food Production, Fisheries, Cooperatives and Rural Development prepared by the Corporate Planning Unit. It provides current and historical statistical data, analyses and information on the agricultural sector in St.Lucia. It is expected that the various stakeholders within the agriculture sector, learning institutions, partner agencies and the general community will find this publication informative and relevant for their decision making and development planning.

The staff of the Corporate Planning Unit in particular and the Ministry of Agriculture, Food Production, Fisheries, Cooperatives and Rural Development would like to take this opportunity to thank all those individuals, agencies and corporate entities, who so willingly support this initiative by supplying the data needed for the review exercise. We would also like to extend our gratitude to those who provided suggestions or criticisms regarding the improvement of this publication.

This edition presents historical data from 2009 with specific focus on the period January to December 2013.

Domestic and International Economic Developments

Preliminary estimates indicate that real economic growth in the domestic economy decelerated to 2.3 percent in 2013, primarily as a result of contractions in key productive sectors, particularly the construction and distributive trade sectors. Consequently, the associated weakened economic impulses were transmitted to the rest of economy and resulted in declines in the growth rate of most of the other productive sectors. By contrast, the tourism sector, buoyed by rebounds in stay-over and cruise ship arrivals, registered growth of 3.2 percent in 2013.

The recovery of the world economy remained slow and uneven in 2013. World output expanded at a decelerated pace of 3.0 percent in 2013. There was a pick-up in financial markets and global foreign investment flows rebounded in 2013, fully reversing the declines in 2012. Inflationary pressures continued to ease in the global economy, owing to lower non-oil commodity prices.

While the global food price index showed no big movements between 2012 and 2013, market developments in major crops and livestock products followed quite different paths. Grain prices declined during 2013. Sugar markets experienced a large over oversupply in 2013, which resulted in downward pressure on prices. Maize markets saw an accelerated decline of price levels during 2013 in anticipation of good harvests in 2014. Wheat and maize production reached record highs in 2013 due to good harvests in major producing countries. These price declines in major crop products (Maize, Wheat, Sugar, Rice) follow a strong positive response to high prices in the previous year.

In contrast to prices of major crops, meat prices rose in 2013. Relatively low supplies of beef were the result of slow recovery of livestock herds after several years of decline, especially in the United States. World poultry prices moved up as well, being strongly influenced by higher prices for Brazilian Poultry. The upward movement of pork prices followed supply contractions in the European Union. (OECD, 2013)

Overview of the Agricultural Sector

Over the 2013 review period, the agricultural sector exhibited real growth of 5.2% a notable weakening from the sector's 11.4 % growth in 2012. This outturn reflected declining growth rates in most of the various sub-sectors with the exception of the non-traditional crops sub-sector which grew by 31.4 %. Agriculture's contribution to GDP grew marginally in 2013, from 3.0 % in 2012 to 3.2% in 2013.

**Table I-2 Agricultural Value Added (EC\$Million) by Economic Activity at Basic Prices
CONSTANT PRICES - 2006**

Agricultural Activity & Percentage Contribution	2009r	2010r	2011r	2012 r	2013r
Bananas - GDP	52.29	27.26	14.16	21.38	20.03
% Contribution to Total GDP	2.1	1.1	0.6	0.8	0.8
Rate of Growth	-8.0%	-48.8%	-48.0%	50.9%	-6.3%
Other Crops - GDP	27.09	19.13	22.99	22.98	30.21
% Contribution to Total GDP	0.9	0.8	0.9	0.9	1.2
Rate of Growth	-3.6%	-20.3%	20.2%	0.0%	31.4%
Livestock - GDP	8.96	9.29	9.02	9.41	8.64
% Contribution to Total GDP	0.4	0.4	0.4	0.4	0.3
Rate of Growth	1.7%	3.4%	-2.9%	4.3%	-8.1%
Fishing - GDP	19.79	19.66	20.06	20.14	18.95
% Contribution to Total GDP	0.8	0.8	0.8	0.8	0.8
Rate of Growth	2.2%	-0.6%	2.1%	0.4%	-5.9%

Forestry - GDP	1.00	1.22	1.25	1.25	1.26
% Contribution to Total GDP	0.1	0.0	0.0	0.0	0.1
Rate of Growth	1.7%	-47.1%	2.5%	0.2%	0.8%
Total Agricultural GDP	109.13	76.56	67.48	75.16	79.09
Total Agriculture Growth Rate	-4.3%	-29.3%	-11.9%	11.4%	5.2%
% Contribution to Total GDP	4.2	3.0	2.6	3.0	3.2

*Source : Government Statistics
Department - St. Lucia*

r - revised

Bananas

Banana exports to the United Kingdom increased marginally by 1.9 percent to 12,352 tonnes in 2013, indicating the continued efforts at combating the Black Sigatoka leaf spot disease. Conversely, banana exports to the regional market declined by 15.7 percent to 2051 tonnes in 2013.

Non-Traditional Crops

Notwithstanding a 10.2 percent decline in the volume of non-traditional crops purchased by the export-subsector to 832.2 tonnes, there was an increase in the volume of non-traditional crops purchased by supermarkets and hotels. Total domestic sales to supermarket and hotels increased by 15.7 percent to 4,545 tonnes, with supermarkets purchases accounting for 74.3 percent of total purchases.

Fisheries

Output in the fisheries sub-sector declined by 4.0 percent to 1,639 tonnes partly attributed to unfavorable climatic conditions which affected the availability of pelagic fish species.

Livestock

There was an overall contraction in activity within the livestock sub-sector. Notwithstanding a 14.2 percent increase in the volume of chicken production in 2013 to 1,690.5 tonnes, pork

production fell by 20.1 percent to 154 tonnes, due to an increase in the cost of feed. Egg production declined by 3.2 percent to 1.1 million dozen eggs during the review period.

The Banana Industry



In 2013, banana exports to the United Kingdom increased by 1.9 percent to 12,352 tonnes, partly attributed to efforts at managing the Black Sigatoka Leaf Spot disease through Government continued assistance to farmers with leaf spot control material along with favourable weather conditions throughout most of 2013. This resulted in an increase in export earnings by 4 percent to \$22 million. The St.Lucia National Fairtrade Organization handled the majority of bananas exported to the UK in 2013. (12,082 tonnes of the total 12,352 export tonnage). The remaining 270 tonnes of bananas was exported by Total Quality Fruit Company which had not handled the export of bananas for the previous two years.

Table II - 1. Banana Exports by Banana Companies, 2009 - 2013

Year	TQFC		SLNFTO		TOTAL	
	Quantity (Tonnes)	Value (\$EC)	Quantity (Tonnes)	Value (\$EC)	Quantity (Tonnes)	Value (\$EC)
2009	3,933	6,500,632	29,992	49,840,857	33,925	56,341,489
2010	3,713	7,166,904	17,988	34,712,100	21,701	41,879,004
2011	0	0	6,557	12,955,135	6,557	12,955,135
2012	0	0	12,126	21,118,136	12,126	21,118,136
2013 1st Quarter	0	0	2972	5309614	2,972	5,309,614
2nd Quarter	0	0	3445	6195519	3,445	6,195,519
3rd Quarter	67	100,412	2615	4618291	2,682	4,718,703
4th Quarter	204	307,094	3049	5436123	3,253	5,743,217
Total 2013/r	270	407,506	12,082	21,559,547	12,352	21,967,053

Source : WINFRESH

/r - Revised

TQFC - Tropical Quality Fruit Company



Exports to the regional market showed a decreasing trend as a result of increasing local demand. Following a 39.8 percent decline in regional exports of bananas in 2012 to 2,432 tonnes, banana exports to the region declined by 15.7 to 2,051 tonnes in 2013. Revenue derived from regional banana exports declined by 7.6 percent to EC\$1.5 million. Conversely, local supermarket and hotel banana purchases grew by 15.3 percent to 1,366.9 tonnes in 2013. Barbados and Trinidad accounted for the largest share of banana exports to the region. (99.6 percent of total regional exports). Exports of bananas to Barbados declined by 25.6 percent to 1,718.8 tonnes with a corresponding decline in revenue of 28.3 percent to \$1.1 million. On the other hand, exports to Trinidad more than doubled in 2013. Exports to Trinidad grew by 166.1 percent to 323.7 tonnes, valued at \$413, 000 in 2013.

Table II-2 Regional Exports of Bananas by Country 2009- 2013

Country	2009		2010		2011		2012		2013	
	Quantity Tonnes	Value EC\$'000	Quantity Tonnes	Value EC\$'000	Quantity Tonnes	Value EC\$'000	Quantity Tonnes	Value EC\$'000	Quantity Tonnes	Value EC\$'000
Anguilla	0.01	0.02	-	-	-	-	0.01	0.01	-	-
Antigua	-	-	-	-	-	-	-	-	1.00	2.76
Barbados	1394.00	1180.00	1428.33	1220.99	2117.83	1824.31	2310.10	1489.02	1718.77	1068.12
British Virgin Islands	0.04	0.20	-	-	-	-	-	-	-	-
Grenada	9.00	18.20	-	-	-	-	-	-	-	-
St. Maarten	0.10	0.30	0.63	0.72	0	0.01	-	-	-	-
St. Kitts	-	-	-	-	-	-	-	-	7.53	18.04
Tortola	-	-	-	-	-	-	-	-	-	-
Trinidad	648.00	707.00	2257.80	3548.57	1921.68	2116.34	121.65	136.80	323.72	413.64
Virgin Islands	0.07	0.20	0.01	0.01	-	-	-	-	-	-
TOTAL	2051.22	1905.92	3686.77	4770.29	4039.51	3940.66	2431.76	1625.83	2051.02	1502.57

Source: - Foreign Trade & Statistics Department (MOA)

The prices of banana inputs varied in 2013. While the prices of most types of fertilizers decreased in 2013, the prices of most types of weedicides and fungicides recorded increases in 2013 compared to the previous year. The use of the nematicide, Furadan has been discontinued for the past three years. This product is no longer manufactured due to its hazardous nature.

Vidate, which registered an increase in price in 2013, was the only type of nematicide used during the past three years.

Table II - 3. Price Range of Banana Inputs, 2013

Type of Inputs	Unit of Quantity	Price Range EC\$
Blue Diothene	100	60.00
Twine	Roll	55 - 65
<u>FERTILIZERS</u>		
Fertilizer N.P.K. - 12.12.24	50kg	112.00
Fertilizer N.P.K. - 12.12.17	50kg	104.75
- 16.8.24+2.5	50kg	114.45 - 130.00
Sulphate of Ammonia	50kg	65.00
Urea 46%	50kg	124.00 - 141.00
<u>WEEDICIDES</u>		
Gramaxone	1lt	26.5 - 28.05
	5lt	136.05
Touch Down Liter	1lt	33.15 - 53.00
	5lt	244.70
Gramocil Liter	1lt	39.10 - 42.67
	5lt	196.00
Basta	1lt	75.40
Reglone	1lt	49.07
	5lt	200.00
<u>FUNGICIDES</u>		
Neozil	16 grams	NA
Neozil	32 grams	12.00
Amistar	50 gr	49.20
<u>NEMATICIDES</u>		
Vidate	1 gal	155.00 - 177.08
Furadan 10G	10 Kg	DISCONTINUED
Furadan 10G	25Kg	DISCONTINUED
Furadan 5G	25kg	DISCONTINUED
<u>BORATICIDE</u>		
Regent 200 s/c	500ml	243.00

Source: Grace Farmers & Renwick and Company

The Cocoa Industry



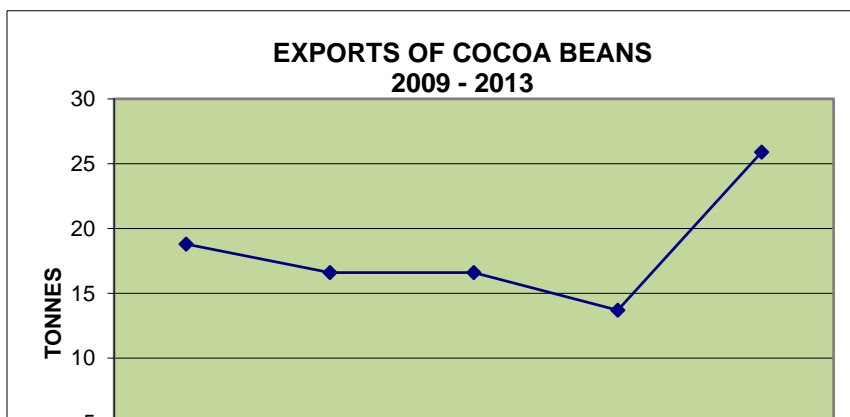
Following three consecutive years of decline, the production of cocoa beans more than doubled in 2013. Cocoa beans production grew by 129 percent to 57.7 tonnes in 2013. Cocoa beans were produced during the second, third and fourth quarters of 2013. All three quarters of 2013 registered growth compared to the corresponding period in 2012. This outturn reflected burgeoning local and international demand for St. Lucian cocoa beans. In keeping with the growth in domestic production of cocoa beans, cocoa exports rose by 89 percent to 25.9 tonnes during the period under review. Accordingly, the value of cocoa exported increased by 90.3 percent to \$330.2 thousand dollars. In 2013, 20.3 tonnes of cocoa beans were exported to Hotel Chocolat, one of St. Lucia’s major export markets in the UK for both primary and value –added cocoa.

Table III - 1 Production and Exports of Cocoa Beans, 2009 - 2013

Year	Production (Tonnes)	Export	
		Quantity (Tonnes)	Value \$'000
2009	110.2	18.8	211.6
2010	57.2	16.6	211.0
2011	46.1	16.6	209.0
2012	25.2	13.7	173.5
2013 1st Quarter	0.0	0.0	0.0
2nd Quarter	13.6	7.8	126.1
3rd Quarter	8.7	8.8	57.5
4th Quarter	35.4	9.2	146.6
Total 2013	57.7	25.9	330.2

Source : St. Lucia Agriculturist Association, Hotel Chocolat & Foreign Trade Report

Fig. III-1



Non-Traditional Crops



The volume of non-traditional crops purchased by supermarkets and hotels increased by 15.7 percent to 4,545 tonnes in 2013, driven largely by the continuous expansion in supermarket purchases. Revenue derived from these sales grew by 20.4 percent to EC\$17.0 million. Supermarket purchases which accounted for 74.3 percent of domestic purchases of other crops rose by 14.5 percent to 3,378 tonnes in 2013, while revenue generated from supermarket purchases grew by 16.6

percent to \$10.7 million. There was an increase in all major produce categories of non-traditional crops purchased by supermarkets in 2013, including Fruit and Tree crops, Vegetables, Musa Species, Root Crops, Herbs and Spices and Miscellaneous Crops. This was partly due to the ongoing support provided to farmers by the Ministry of Agriculture and Consolidated Foods Limited through the Farmer Certification Programme. The Ministry of Agriculture continued its islandwide Farmer Certification Programme geared towards enhancing production and marketing linkages between farmers and purchasers through the provision of technical assistance/training to farmers.

The volume of non-traditional crops purchased by hotels increased by 19.2 percent to 1,167 tonnes in 2013, while revenue generated rose by 27.4 percent to \$6.3 million. This outcome was attributed to improved farmer relations with the hotels as a result of an improvement in the payment period to farmers, favourable weather conditions along with an increase in stay- over arrivals in 2013.

Table IV-1

**Quantity (Kgs) of Selected Local Agricultural Produce Purchased by Selected
Marketing outlets 2009 - 2013**

Crop	2009	2010	2011	2012	2013
Fruit & Tree Crops	431,595	350,887	250,075	520,229	568,968
Vegetables	769,860	557,324	364,899	811,421	859,580
Musa Species	1,270,923	1,164,964	680,760	1,213,037	1,520,762
Root Crops	301,470	186,214	169,048	335,024	338,987
Herbs and Spices	50,353	39,124	25,437	66,056	69,498
Miscellaneous Crops	2,955	6,976	3,903	4,561	19,944
Total	2,827,156	2,305,489	1,494,122	2,950,328	3,377,739

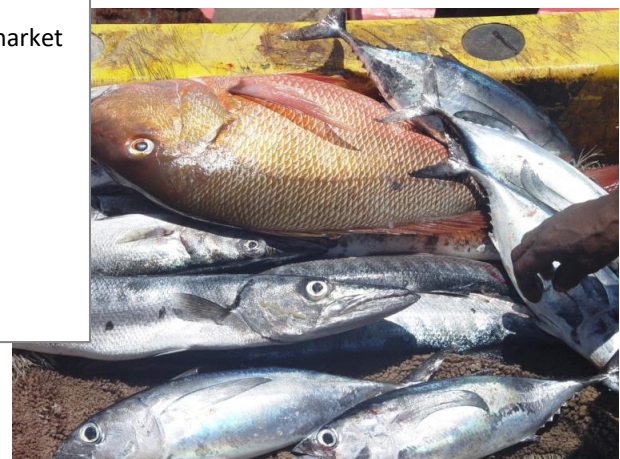
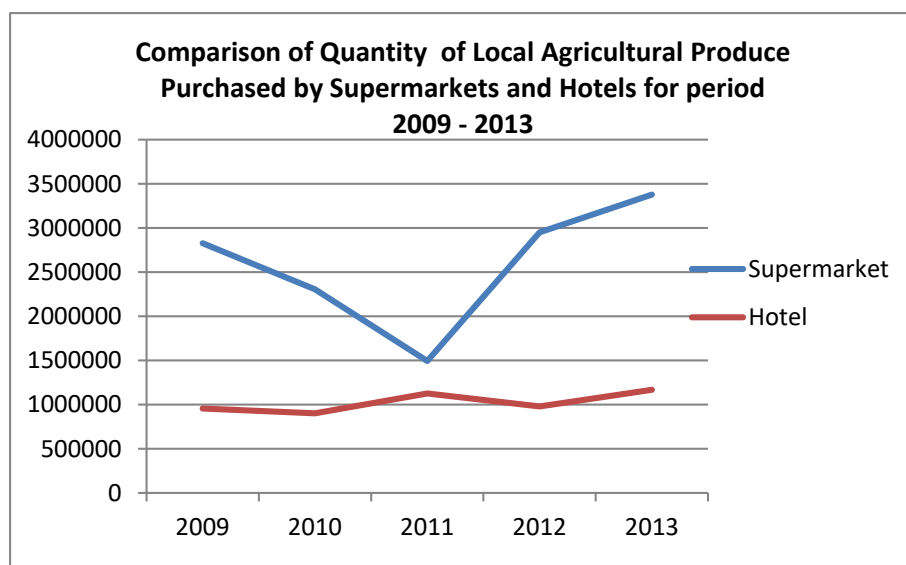
Table IV-2

**Quantity (Kgs) of Selected Local Agricultural Produce Purchased by Selected
Hotels 2009 - 2013**

Crop	2009	2010	2011	2012	2013
Fruit & Tree Crops	291,762	300,593	322,768	313,676	391,279
Vegetables	257,255	209,599	280,671	228,619	291,032
Musa Species	279,865	289,270	314,931	280,257	298,367
Root Crops	110,963	83,847	170,595	141,030	163,179
Herbs and Spices	14,616	14,619	29,944	13,959	20,144
Miscellaneous Crops	1,062	2,583	7,209	1,767	3,161
Total	955,523	900,511	1,126,118	979,308	1,167,160

Figure 1V- 1 Quantity of Local Agricultural Produce Purchased by Supermarkets and Hotels

Fisheries Sector



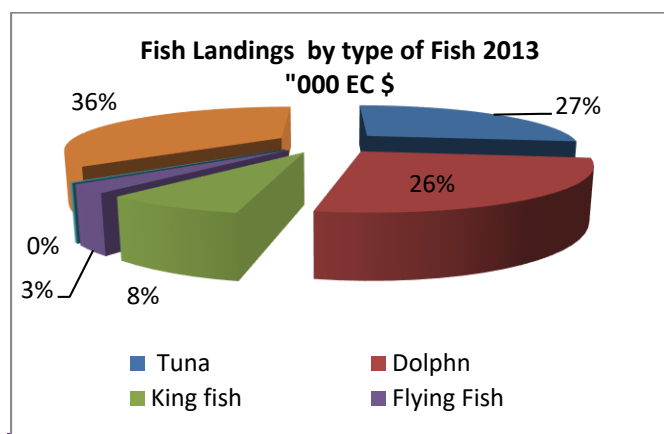
In contrast with developments in the previous year, fish landings in 2013 fell by 4.1 percent to 1,639 tonnes, valued at \$25.9 million in 2013. The magnitude of the catch continued to be heavily influenced by variability in weather conditions that impacted on the migratory pattern of pelagic species. An analysis of landings by species indicates a decline in all major categories with the exception of tuna and flying fish. Tuna accounted for 30 percent of all landings and grew by 11.3 percent to 492 tonnes, while landings of flying fish, which display a large degree of natural variability, rose from 4 tonnes to 107 tonnes. Following growth of 6.6 percent in 2012, landings of dolphin, the second major category of fish landed in 2013, fell by 23.2 percent to 387 tonnes. Landings of Kingfish, the third largest species of fish landed declined by 2.0 percent to 148 tonnes in 2013.

Table V-2. Fish Landings by Species, Quantity and Value, 2009 - 2013

Year	Type of Fish (Tonnes)													
	Tuna		Dolphin		King Fish		Flying Fish		Shark/Black Fish		Others		Total	
	Tonnes	\$'000	Tonnes	\$'000	Tonnes	\$'000	Tonnes	\$'000	Tonnes	\$'000	Tonnes	\$'000	Tonnes	\$'000
2009	486	6,398	465	6,748	195	2,489	220	1,215	9	89	483	7,123	1,857	24,062
2010	613	8,065	352	5,383	199	2,472	109	604	9	84	519	7,690	1,801	24,298
2011	541	7,015	473	7,137	197	2,497	22	147	3	33	457	7,969	1,693	24,798
2012	442	6,015	504	7,573	151	1,921	4	22	11	112	598	9,640	1,709	25,283
2013	492	7,028	387	6,704	148	2,050	107	754	7	83	498	9,235	1,639	25,853

Source: Fisheries Management Unit, M.O.A

Other for 2013 and 2014 also consist of Snapper, Lobster, Conch and Lionfish



During the review period, Vieux-Fort and Dennery continued to be the largest landing sites with 33 percent and 18.7 percent of total catch respectively. Landings at all major sites declined with the exception of Gros-Islet, Choiseul and Vieux-Fort which increased by 33.3, 2.4 and 1.9 percent respectively.

Following growth of 8.4 percent in fish imports in 2012, imports of fish declined by 31.4 percent to 1,143 tonnes in 2013. The first, second, third and fourth quarters of 2013 recorded declines of 24.0, 41.2, 26.1 and 33.6 percent respectively. Imports of frozen and chilled fish declined by 31.5 percent to 309 tonnes while imports of canned fish declined by 19.4 percent to 593 tonnes in 2013. This decline in fish imports augured well for St.Lucia's food import bill which posted a decline in 2013.

**Table V-1 Estimated Quantity of Fish Landed at Landing Site
2009 - 2013**

Landing Site	TONNES				
	2009	2010	2011	2012	2013
Gros Islet	174	127	77	111	148
Castries	75	71	88	85	47
Soufriere	120	156	115	82	37
Choiseul	97	99	104	85	87
Laborie*	50	45		82	63

Vieux - Fort 1/	407	476	539	531	541
Micoud	99	109	101	116	102
Dennerly	431	376	282	307	306
Others 2/	404	342	387	311	309
Total	1,857	1,801	1,693	1,709	1,639

Table V- 3. Fish Imports by Type, Quantity and Value 2009 – 2013

Year	Total		Frozen & Chilled		Canned		Other	
	Tonnes	\$'000	Tonnes	\$'000	Tonnes	\$'000	Tonnes	\$'000
2009	1,369	15,638	308	3,465	638	6,538	423	5,635
2010	1,551	18,564	322	4,685	781	7,675	448	6,204
2011	1,537	21,587	318	6,087	728	8,540	491	6,960
2012	1,666	25,479	451	8,782	736	9,300	479	7,397
2013 1st Quarter	295	3,950	96	1,218	143	1,755	56	977
2nd Quarter	237	3,295	40	706	142	1,747	55	842
3rd Quarter	303	4,359	44	810	201	2,683	58	866
4th Quarter	308	4,110	130	1,877	107	1,283	70	950
Total 2013	1,143	15,714	309	4,611	593	7,468	240	3,634

Source: Foreign Trade Report

Livestock Subsector



St. Lucia's poultry industry in 2013 remained very fragile with many challenges experienced as a result of the high cost of feed and inconsistencies in feed supply. Farmers threatened to leave the industry because of the lack of profitability on their part. In June of 2013, the production of feed commenced in the South of the island by a private company known as Caribbean Grains. This development was welcomed by the poultry sub-sector as an indication of consistency and reliability in the supply and quality of feed on the island. Even with the establishment of the feed mill on the island, farmers continued to grapple with the high cost of feed and to a lesser extent inconsistencies in feed supply. The local poultry industry accounts for 25 percent of chicken consumed locally and 100 percent of eggs consumed on the island. Notwithstanding these challenges, local chicken

production exceeded the levels recorded in 2012 by 14.2 percent to 1,690.5 tonnes with a commensurate increase in revenue. Poultry production increased by 29.9, 15.1 and 27.4 percent respectively during the first, second and fourth quarters of 2013. The third quarter of 2013 registered a decline in local poultry production of 15.6 percent to 305.6 tonnes. While the production of mixed parts rose by 44.3 percent to 933 tonnes, production of whole chicken declined by 9.2 percent to 757.5 tonnes.

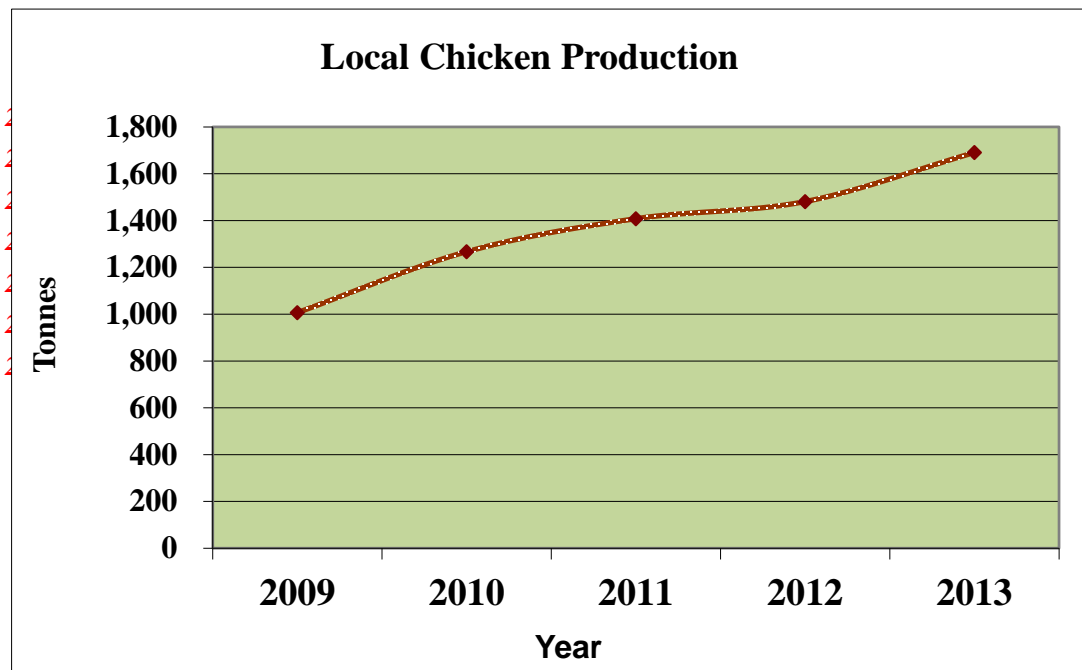
Table VI-3 Summary of Local Poultry (Chicken) Production, 2009 - 2013

Year	Whole Chicken		Mixed Parts		Total	
	Dressed Weight (Tonnes)	Value EC\$'000	Dressed Weight (Tonnes)	Value EC\$'000	Dressed Weight (Tonnes)	Value EC\$'000
2009	714.4	8466.7	292.2	3419.8	1006.6	11886.5
2010	707.4	8422.0	560.5	6683.2	1267.9	15105.2
2011	807.9	9438.3	600.2	7037.8	1408.1	16476.1
2012	834.1	9550.6	646.5	7311.6	1480.6	16862.2
2013 1st Quarter	228.1	2587.0	224.5	2506.9	452.6	5094.0
2nd Quarter	205.2	2306.2	252.6	2556.3	457.8	4862.4
3rd Quarter	128.7	1506.6	176.9	1973.8	305.6	3480.4
4th Quarter	195.5	2331.2	278.9	3278.2	474.4	5609.4
Total 2013	757.5	8731.0	933.0	10315.2	1690.5	19046.2

Source : Livestock Department, Ministry of Agriculture

Data was obtained by compiling the local purchases from the Poultry Processors

Fig VI-3



Total poultry imports declined by 1.4 percent to 9,531 tonnes in 2013. This was primarily driven by a 2.0 percent reduction in total imports of chicken to 8,550 tonnes. Imports of whole chicken rose from 3 tonnes in 2012 to 6 tonnes in 2013 while imports of chicken necks, backs and wings rose by 1.3 percent to 4,003 tonnes. Imports of chicken other parts declined by 4.8 percent to 4,542 tonnes. Imports of turkey, which accounted for 9.8 percent of total poultry imports in 2013 rose by 4.0 percent to 937 tonnes.

Table VI-1 Poultry Imports 1/ by Species, Quantity and Value, 2009 - 2013

Year	POULTRY							
	Total		Whole		Necks, Backs, Wings		Other Parts	
	Tonnes	EC\$'000	Tonnes	EC\$'000	Tonnes	EC\$'000	Tonnes	EC\$'000
2009	8,369	32,740	102	547	4,359	14,296	3,908	17,897
Chicken	7,202	27,096	2	20	3,647	11,025	3,553	16,050
Turkey	1,110	5,187	65	360	712	3,271	333	1,556
Other	57	457	34	167	---	---	23	290
2010	6,722	25,470	81	526	3,590	11,174	3,051	13,770
Chicken	2,681	21,203	6	25	3,105	8,890	2,799	12,288
Turkey	357	4,317	76	501	485	2,284	226	1,162
Other	12	321	0	0	0	0	26	321
2011	9,236	38,618	85	612	4,577	16,216	4,574	21,790
Chicken	8,279	33,288	9	30	4,028	13,456	4,242	19,804
Turkey	914	4,875	76	582	549	2,760	289	1,532
Other	43	454	0	0	0	0	43	453
2012	9,671	39,682	109	804	4,490	15,640	5,072	23,238
Chicken	8,725	34,791	3	32	3,950	13,303	4,772	21,456
Turkey	901	4,309	82	582	540	2,337	279	1,389
Other	45	582	24	190	0	0	21	392
2013	9,531	40,255	113	1,033	4,627	16,235	4,792	22,987
Chicken	8,550	35,549	6	38	4,003	13,823	4,542	21,688
Turkey	937	4,178	63	466	624	2,412	250	1,300

Other	44	529	44	529	---	---	---	---
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Source : Foreign Trade Report

1/ Frozen and/or Chilled

Other' specifies Ducks, Geese and Guinea Fowls.

Egg Production



Egg production contracted by 3.2 percent to 1.1 million dozen eggs while revenue decreased by 0.5 percent to \$7.1 million in 2013. This was primarily due to a marked reduction in egg production during the fourth quarter which resulted in shortages in December, resulting in the importation of 24 thousand dozen eggs during the fourth quarter of 2013. Egg production declined by 32.8 percent to 221 thousand dozen eggs during the fourth quarter of 2013.

Egg production rose by 18.3 and 11.2 percent respectively during the second and third quarters of 2013. There was a marginal decline of 2.4 percent in egg production during the first quarter of 2013 to 329 thousand dozen eggs.

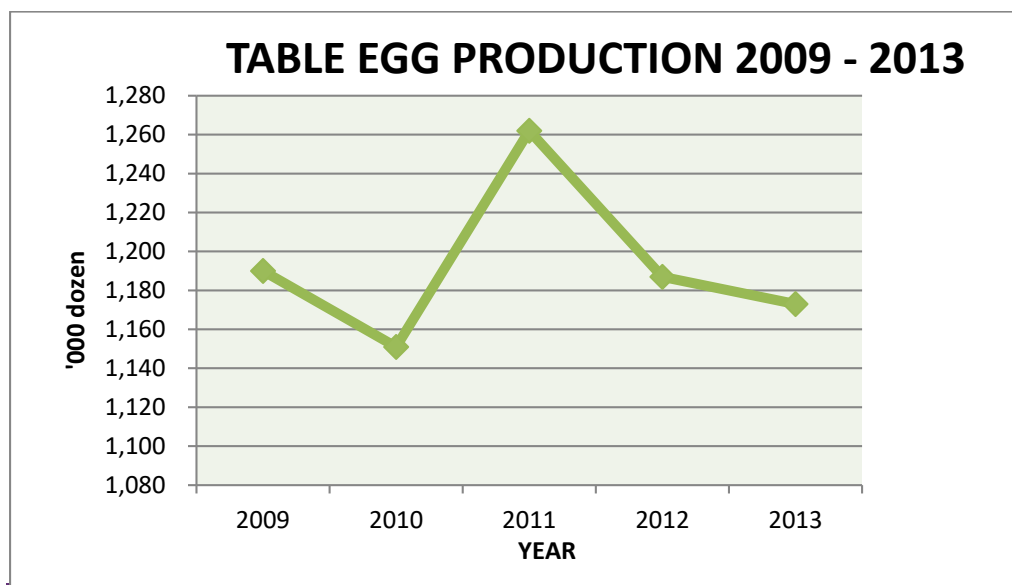
Table VI-2 Table Egg Production and Imports, 2009 - 2013

Year	Average Laying Stock on Farm 000 Hens	Local Production		Imports		Available Supply	
		Quantity 000 Dozen Eggs	Producer Value EC\$'000	Quantity 000 Dozen Eggs	Producer Value EC\$'000	Quantity 000 Dozen Eggs	Producer Value EC\$'000
2009	69	1,190	6,543	0	0	1,190	6,543
2010	61	1,151	6,331	0	0	1,151	6,331
2011	65	1262	6947	0	0	1,262	6,947
2012	63	1187	7126	0	0	1,187	7,126
2013 1st Quarter	71	329	2033	0	0	329	2,033
2nd Quarter	43	310	1915	0	0	310	1,915
3rd Quarter	68	288	1779	0	0	288	1,779

4th Quarter	52	221	1364	24	134	245	1,497
Total 2013	58	1149	7091	24	134	1173	7225

Source : Livestock Department - Ministry of Agriculture & Foreign Trade Report

Fig V1-2



Local Pork Purchases



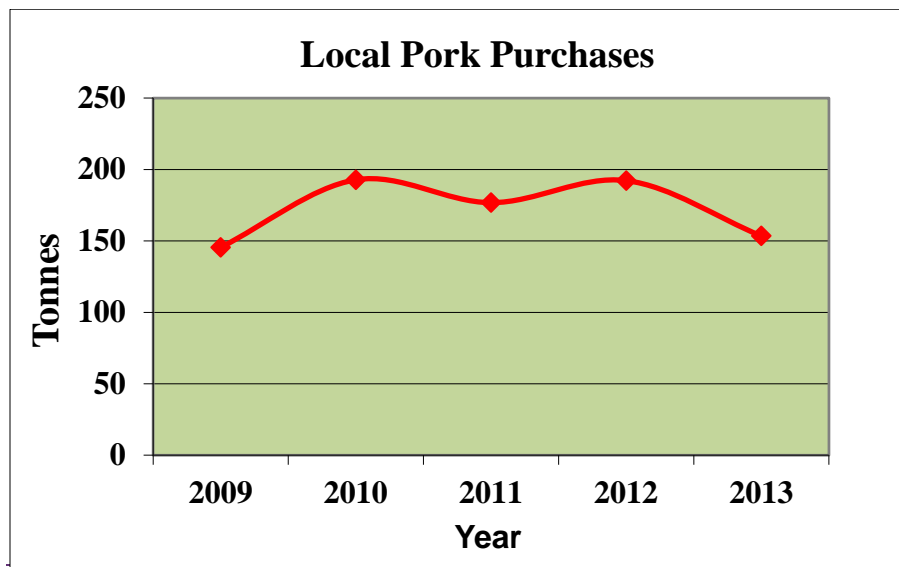
Pork production declined by 20.1 percent to 153.5 tonnes in 2013. Similarly, revenue declined by 16.9 tonnes to EC\$2.0 million. This outturn was occasioned by a significant increase in the cost of feed which contributed to the exit of many small farmers. Pork production declined during the first, second and third quarters of 2013 compared to the corresponding period in 2012 while output during the fourth quarter rose slightly by 3.6 percent to 44.7 tonnes.

Table VI - 4 Pork Purchases, 2009 - 2013

Year	Quantity	Value
------	----------	-------

	(Tonnes)	EC\$'000
2009	145.51	1,849
2010	192.76	2,442
2011	176.80	2,279
2012	192.21	2,463
2013 1st Quarter	31.52	427
2nd Quarter	41.14	543
3rd Quarter	36.18	478
4th Quarter	44.67	599
Total 2013	153.51	2047

Source : Importers of meats



Meat Imports

Following three consecutive years of growth, imports of beef declined by 9.0 percent to 644 tonnes, with a corresponding value of \$12.2 million in 2013. The first, second and fourth quarters of 2013 registered declines in beef imports of 2.9, 28.9 and 11.4 percent respectively. Imports of beef rose by 16.8 percent to 132 tonnes during the third quarter of 2013. Pork imports increased by 27.4 percent to 782 tonnes in 2013. All four quarters of 2013 registered increases in the importation of pork. This was primarily attributed to the inability of local pork producers to satisfy domestic demand, particularly the hotel sector. Mutton imports increased by 7.9 percent while chevron imports contracted by 9.8 percent to 37 tonnes in 2013.

Table VI - 5 Meat Imports 1/ by Type, Quantity and Value 2009 - 2013

Year	Beef		Pork		Mutton		Chevron	
	Tonnes	EC\$'000	Tonnes	EC\$'000	Tonnes	EC\$'000	Tonnes	EC\$'000
2009	473	8,700	417	2,256	584	4,292	39	221
2010	513	10,240	586	3,688	445	5,180	37	288
2011	603	11,291	499	3,716	413	5,795	20	242
2012	708	12,598	614	4,709	277	3,808	41	335
2013 1st Quarter	200	3,715	168	1,218	81	1,176	5	97
2nd Quarter	133	2,056	196	1,309	61	765	5	53
3rd Quarter	132	2,718	166	1,033	56	690	13	92
4th Quarter	179	3,711	252	1,584	101	1,321	13	131
Total 2013	644	12,200	782	5,145	299	3,951	37	372

Source : Foreign Trade Report
1/ - Frozen and/or Chilled

Fig VI-5

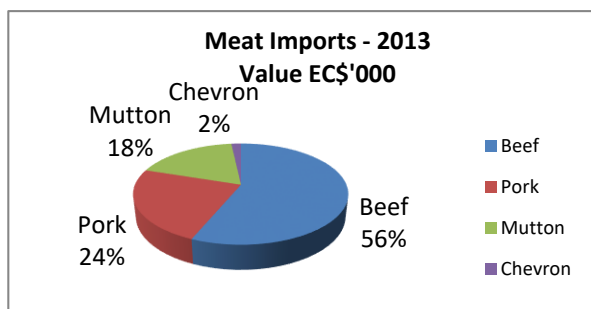
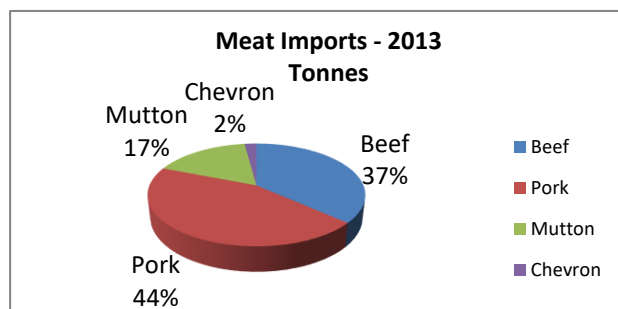


Fig VI-4



Imports of Selected Livestock Products

During the period under review, imports of cheese and butter registered growth while imports of milk declined. Notwithstanding a 5.0 percent decline in milk imports in 2013, the value of milk imports increased by 5.7 percent to \$24.0 million, indicating an increase in the landed price of milk. Imports of milk contracted during the first three quarters of 2013, while quarter four registered growth of 7.8 percent to 1,089 tonnes. Cheese imports increased by 7.7 percent to 1,081 tonnes with a corresponding value of \$15.6 million in 2013. Cheese imports increased during the first two quarters of 2013 and declined during the last two quarters of 2013. There was a significant increase in the importation of butter in 2013. Butter imports grew by 70.8 percent to 181 tonnes, valued at \$2.5 million.

Table VI - 6 Imports of Selected Livestock Products, 2009 - 2013

Year	Milk		Cheese		Butter/Butterfat	
	Tonnes	EC\$'000	Tonnes	EC\$'000	Tonnes	EC\$'000
2009	3,853	18,689	846	11,245	92	1,510
2010	2,890	15,922	822	11,651	101	1,659
2011	3,869	21,319	1,063	15,062	121	1,975
2012	4,319	22,732	1,004	13,287	106	1,431
2013 1st Quarter	1,135	6,376	305	4,373	47	695
2nd Quarter	949	5,343	300	4,123	34	514
3rd Quarter	932	5,481	206	2,865	61	759
4th Quarter	1,089	6,829	270	4,252	40	549
Total 2013	4,105	24,029	1,081	15,613	181	2,517

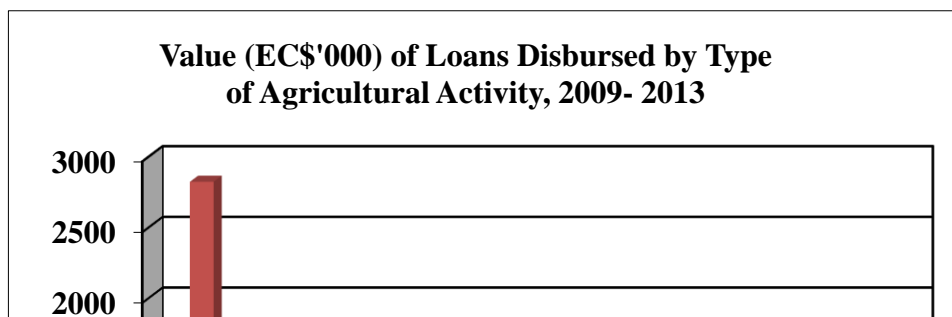
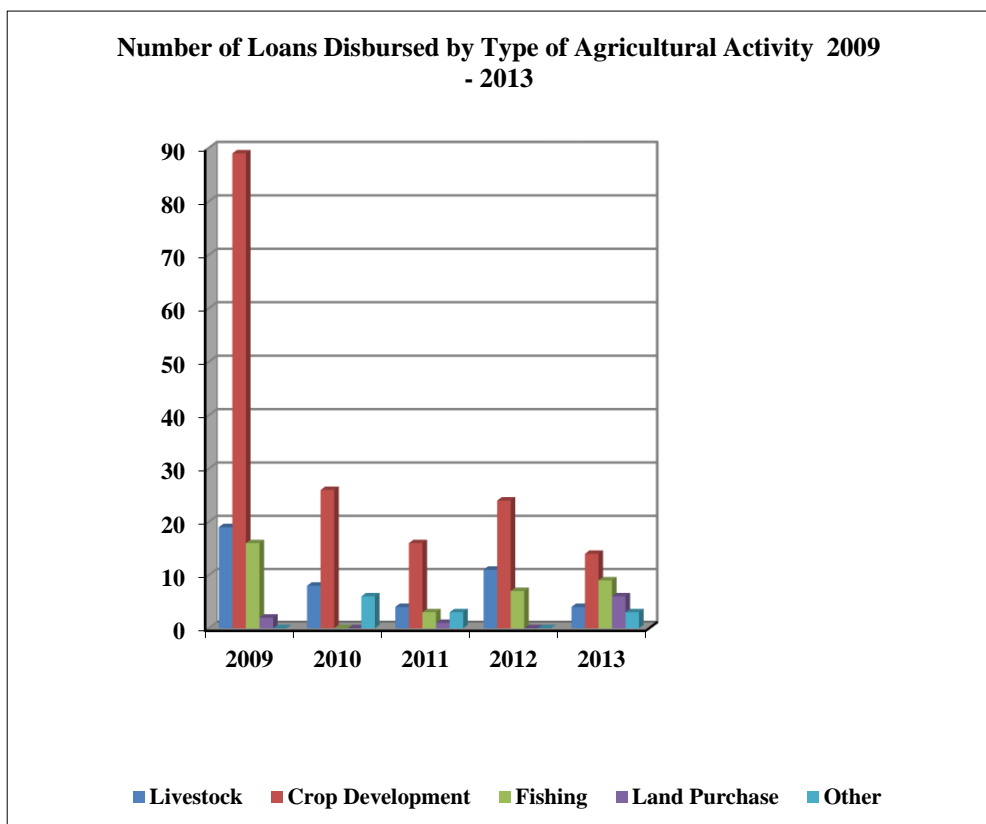
Source : Foreign Trade Report

- 11+ acres	-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-	-
Total Crop Development	89	2,824	26	430	16	296	24	753	14	162
Industry	1	1,500	-	-	-	-	1	50	-	-
Land Purchase and Development	2	123	-	-	1	52	-	-	6	333
Other	-	-	6	1,499	3	85	-	-	3	69
Grand Total	127	5,229	40	2,949	27	629	43	1,628	36	1,201

Source : Bank of St. Lucia and St. Lucia Development Bank

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Fig VII-1



Food Trade Balance

There was a narrowing of the deficit on the food trade balance in 2013 by 3.2 percent to \$325.2 million. This outturn was attributed to a 37.8 percent increase in food exports coupled with a 0.4 percent decrease in food imports during the period under review. Domestic food exports grew by 102.0, 79.6 and 78.2 percent respectively during the first, second and fourth quarters of 2013 and declined by 33.3 percent to \$6.4 million during the third quarter of 2013. Total domestic exports declined by 18.0 percent to \$140.0 million in 2013 compared to the corresponding period in 2012. The first two quarters of 2013 registered growth in domestic exports of 57.9 and 20.5 percent respectively, while the last two quarters registered declines of 48.1 and 33.0 percent respectively. Total imports in 2013 rose by 28.8 percent to \$2.2 billion. There was a significant increase in total imports during the second quarter of 2013; total imports grew by 165.4 percent to \$1.1 billion. While the last quarter of 2013 registered growth in total imports of 2.2 percent, total imports declined by 22.4 and 18.8 percent respectively during the first and third quarters of 2013. Food imports as a percentage of total imports declined from 21 percent in 2012 to 16 percent in 2013, while food exports as a percentage of domestic exports grew from 14 percent in 2012 to 24 percent in 2013.

Table VIII-1 Trade Balance on Food, 2009 - 2013

Year	EXPORTS EC\$'000			IMPORTS EC\$'000			Trade Balance on Food
	Domestic Exports (1)	Food Exports (2)	(2) as a % of (1) (3)	Total Imports (4)	Food Imports (5)	(5) as a % of (4) (6)	
2009	186,881	70,357	38	1,378,583	292,859	21	(222,502)
2010	190,022	48,710	26	1,417,805	276,535	20	(227,825)
2011	237,839	24,067	10	1,889,137	355,457	19	(331,390)
2012	170,593	24,267	14	1,744,022	360,167	21	(335,900)
2013 1st Quarter	34,084	6,585	19	339,070	89,440	26	(82,855)
2nd Quarter	36,087	7,069	20	1,090,378	89,555	8	(82,486)
3rd Quarter	34,372	6,368	19	381,769	86,414	23	(80,046)
4th Quarter	35,373	13,421	38	435,500	93,186	21	(79,766)
Total 2013	139,916	33,443	24	2,246,717	358,596	16	(325,152)

Source : Foreign Trade Report

Composition of Food Imports

Meat and meat preparations, cereal and cereal preparations, vegetables and fruits and dairy products and eggs continued to be the four major categories of food items imported over the past three years. Meat and meat preparation which accounted for 22 percent of total food imports in 2013 grew marginally from \$78.9 million in 2012 to \$79.0 million in 2013. Cereal and cereal preparations which accounted for 21 percent of total food imports in 2013 was the second largest category of food items imported. Cereal and cereal preparations rose from \$70.2 million in 2012 to \$76.3 million in 2013. Vegetables and fruits was the third largest category of total food imports in 2013 and remained constant at 15 percent of total food imports in 2013 compared to the corresponding period in 2012. Dairy products and eggs accounted for 13 percent of total food imports in 2013 and grew by 14.3 percent to \$47.9 million in 2013.

Table IX - 1 Composition of Food Imports, 2009 - 2013

Item	2009		2010		2011		2012		2013	
	EC\$'000	%	EC\$'000	%	EC\$'000	%	EC\$'000	%	EC\$'000	%
Live Animals	595	---	347	0	276	0	392	0	215	0
Meat & Meat Preparations	64,002	22	55,859	20	79,086	22	78,971	22	79,015	22
Dairy Products & Eggs	38,795	13	33,606	12	44,172	12	41,887	12	47,885	13
Fish & Fish Preparation	18,427	6	17,961	6	21,619	6	26,251	7	24,642	7
Cereal & Cereal Preparation	68,422	23	50,871	18	69,094	19	70,192	19	76,276	21
Vegetables and Fruits	43,980	15	42,698	15	56,445	16	53,899	15	54,240	15
Sugar Preparation & Honey	13,919	5	12,983	5	19,441	5	21,766	6	15,840	4
Coffee, Tea, Cocoa & Spices	8,633	3	6,992	3	10,321	3	10,843	3	11,007	3
Feeding Stuff for Animals	3,316	1	11,466	4	15,835	4	16,646	5	16,118	4
Miscellaneous Food Preparation	32,770	11	43,753	16	39,170	11	39,320	11	33,358	9
Total	292,859	100	276,535	100	355,457	100	360,167	100	358,596	100

Source : Foreign Trade Report

Exports of Selected Agri-Produce

Total exports of non-traditional crops declined by 7.5 percent to 2,893 tonnes in 2013. This outturn reflected higher domestic demand for non-traditional crops. Total revenue from exports of non-traditional crops declined by 3.4 percent to \$4.0 million. Total exports of agricultural produce excluding bananas decreased by 10.2 percent to 832 tonnes in 2013 while revenue generated increased by 27.8 percent to \$2.5 million, indicating an increase in the prices of non-traditional crops exported in 2013. Excluding bananas, breadfruit, plantain, avocados and mangoes were the four major crops exported in 2013 and accounted for 80.5 percent of total non-traditional crops exported in 2013. Exports of breadfruit, plantain and mangoes declined by 12.2 percent, 20.9 percent and 60.4 percent respectively. In contrast, exports of avocados rose by 79.7 percent to 40.1 tonnes in 2013.

Table IX - 2 Comparison of Exports of Selected Agricultural Produce, 2009 - 2013

Produce	2009		2010		2011		2012		2013r	
	Tonnes	\$'000	Tonnes	\$'000	Tonnes	\$'000	Tonnes	\$'000	Tonnes	\$'000
Avocado	35.74	73.36	13.60	24.80	27.66	56.38	22.34	52.94	40.14	112.07
Grapefruit	3.82	4.28	2.90	3.91	10.54	19.98	1.86	1.08	0.43	0.22
Mango	32.39	65.70	44.10	93.60	27.98	56.94	47.03	71.76	18.62	19.80
Pineapple	0.00	0.00	0.20	1.50	0.10	0.10	0.00	0.00	0.00	0.00
Sweet Orange	0.03	0.05	0.45	0.50	36.80	12.10	0.11	0.07	0.00	0.00
Breadfruit	447.20	735.50	317.10	521.60	450.06	861.61	422.11	1,316.46	370.44	1,528.86
Plantain	326.68	379.59	343.60	436.72	415.14	482.47	415.02	401.71	328.37	326.22
Aroids 1/	20.36	62.70	3.07	7.90	3.56	9.57	8.12	21.79	0.42	0.71
Sweet Potato	0.72	1.05	1.42	4.66	0.27	0.91	1.14	1.28	0.00	0.00
Yam	1.15	2.30	0.80	1.96	0.28	0.45	0.14	0.24	0.04	0.06
Hot Pepper	3.73	24.13	1.66	7.40	0.35	1.54	9.19	64.75	0.00	0.01
Pumpkin	0.19	0.46	0.21	1.12	0.00	0.00	0.01	0.01	0.09	0.06
Sub Total 2/	872.01	1,349.12	729.11	1,105.67	972.74	1,502.05	927.07	1,932.09	832.17	2,468.50
Banana 3/	2,055.03	1,914.51	3,697.40	4,805.10	2942.88	3,966.11	2200.56	2,211.31	2060.81	1,533.42
Total	2,927.04	3,263.63	4,426.51	5,910.77	3,915.62	5,468.16	3,127.63	4,143.40	2,892.98	4,001.92

Source : Foreign Trade Report & MAFF from Customs Documents, Saint Lucia

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1 - Aroids here are dasheen, tannia and eddoes.

2 - Total amount of non-traditional crops exported.

3 - Exports to other territories excluding the United Kingdom by WINFRESH

