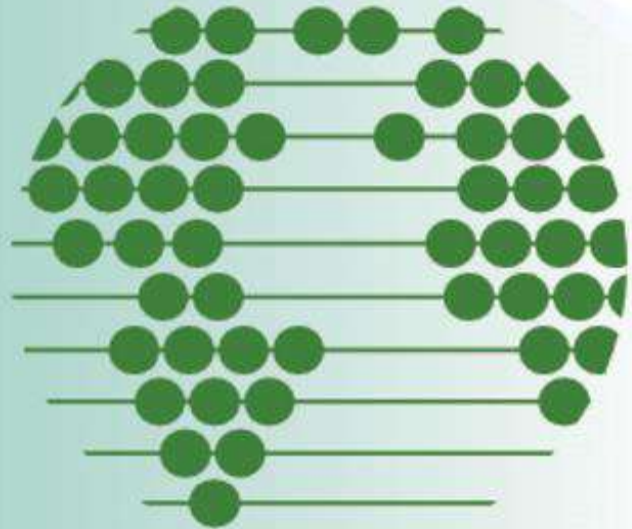




**Government of Belize (BELTRAIDE)/ Commonwealth Secretariat**

## **ROADMAP FOR EXPORT COMPETITIVENESS 2022-2027**

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## CONTENTS

1.	Introduction .....	3
2.	Background .....	4
3.	Situational analysis .....	6
i.	Global Competitiveness Context .....	6
ii.	Belize Trade Performance and implications for national competitiveness .....	8
<u>a)</u>	<i>Export Profile</i> .....	8
<u>b)</u>	<i>Export Competitiveness</i> .....	17
<u>i.</u>	<i>Export Potential and New Product Diversification</i> .....	17
<u>ii.</u>	<i>New Market Development</i> .....	21
<u>iii.</u>	<i>Legal and institutional framework for export facilitation and existing approaches to export development</i> .....	26
4.	Gap analysis .....	27
i.	<i>Key global market trends and developments that have significant implications for Belize's exporters competitiveness</i> .....	27
ii.	<i>Stakeholder engagement on supply-side constraints</i> .....	29
iii.	<i>SWOT Analysis: Competitiveness of Belizean Exports in regional and global markets</i> ...	30
5.	Export Competitiveness Roadmap Strategic Action Plan .....	32
i.	<i>Objectives</i> .....	32
ii.	<i>Key Pillars of Strategy and Rationale for their inclusion</i> .....	32
iii.	<i>Action Plan proposals</i> .....	32
iv.	<i>Timeline for activities</i> .....	36
v.	<i>Implementing Mechanism and Monitoring and Evaluation Framework</i> .....	39
	APPENDICES .....	44
	APPENDIX 1 LIST OF INDIVIDUALS AND ORGANISATIONS CONTRIBUTING TO THE PREPARATION OF THIS ROADMAP .....	45
	APPENDIX 2 RESULTS OF STAKEHOLDER CONSULTATIONS ON SUPPLY SIDE CONSTRAINTS .....	47

## Executive Summary

This report presents the first key deliverable of a consultancy implemented by the Government of Belize, through its Trade and Investment Development Service (BELTRAIDE) with the technical support of the Commonwealth Secretariat. Based on its terms of reference, the report aims to propose a gap analysis on the existing export trends, an assessment of (firm level) supply side and other constraints and develop strategies to address same, **a branding campaign and strategy related to gaps and a roadmap detailing new approaches to increased export competitiveness and the right branding strategies for effective implementation. The branding campaign and strategy will be the subject of a separate document to be submitted after the validation of the initial Roadmap.** Included in the current strategic RoadMap, are recommendations for the buildout of specific niches of services aligned to the support of increased merchandise trade exports.

This Roadmap builds on the National Development Framework for Belize (2019-2030), a previous National Export Strategy (2015-2019), the National Trade Policy (2019-2030) and other national plans.

According to data published in April 2022, global exports grew by 19% in February 2022, as compared to February 2021, despite the extended presence of the global pandemic. Beyond trade, based on the disruption caused by COVID19 to supply chains and the more recent war in the Ukraine, consumers across the globe have been experiencing increasing food prices, while producers battle instability in supply chains, inflation, impact of climate change on crops, higher costs of fertilizer, unstable energy prices and higher costs of transportation and logistics. These trends mandate a focus on reducing transaction costs in export and strategizing towards greater integration with global supply chains and use of technology to achieve gains in productivity.

The RoadMap is proposed based on an analysis of Belizean export performance trends over the past three years, and a further analysis of export potential and export competitiveness based on historical trade data, as presented in the International Trade Centre (ITC) Export Potential Map and TradeMaps. The data collected is fed into a gap analysis, including a review of global trends likely to impact export competitiveness, feedback from local exporters on supply-side constraints and export experiences and a SWOT Analysis in relation to developing export competitiveness.

The RoadMap and Action Plan is then detailed based on six strategic pillars: *new product and services development, new market development and export promotion, technology adoption, standards and certification and export financing*. Critical success factors in the RoadMap implementation include stakeholder engagement and ownership and the management of implementation by a high-level Export Development Council. No dedicated and consistent financing resources for export development were detected at the time of writing. As such, a major part of the terms of reference of the Export Council would be to urgently address the need for such financing to enable growth of the export sector.

## 1. Introduction

The Government of Belize through its Trade and Investment Development Service BELTRAIDE has received the technical support of the Commonwealth Secretariat to explore new approaches to enhance export competitiveness, as well as branding strategies for optimal results. The assistance is being delivered through the preparation of an Export Competitiveness RoadMap, comprising strategies and an implementation plan to address supply-side constraints in agriculture (selected industries), while identifying new approaches to export and new branding strategies.

This Roadmap builds on the National Development Framework for Belize (2019-2030), a previous National Export Strategy (2015-2019), the National Trade Policy (2019-2030) and other national plans. Guided by its terms of reference, this report will build on all these national development reports but will present a more accessible roadmap for the development of exports in relation to merchandise trade in the next five (5) years. It will be based on global export trends and the specific trade potential for Belizean products, based on data provided by the International Trade Centre (ITC) and UN COMTRADE databases and published by the ITC in its Export Potential Maps and Trade Maps. Furthermore, it is the result of stakeholder consultations with the public and private sectors conducted during National Competitiveness Month in May 2022. The consultations aimed to identify existing export streams, supply side constraints that hinder export competitiveness and other gaps. A further validation of the present draft document will be conducted through the imminent National Competitiveness Workshop.

This report presents the first key deliverable of the consultancy, which, based on its terms of reference, aims to propose a gap analysis on the existing export trends, an assessment of (firm level) supply side and other constraints and develop strategies to address same, a branding campaign and strategy related to gaps and a roadmap detailing new approaches to increased export competitiveness and the right branding strategies for effective implementation. The branding campaign and strategy will be the subject of a separate document to be submitted after the validation of the initial Roadmap.

While the potential for development of the Belizean Services sector is recognised, global Service trade data would not be sufficiently disaggregated to provide immediate conclusions for strategy mapping. To support such a mapping, a robust survey of resident services companies and their foreign affiliates would be required. The survey would indicate the direction of trade flows for services inputs and exports and the key priorities for future action in the development of new services and markets. The recommendations formulated should also address the emerging realities of digital trade.

However, included in the current strategic RoadMap, are recommendations for the buildout of specific niches of services aligned to the support of increased merchandise trade exports. These include the development of local service providers for standards and certification and support to

the use of creative and cultural services in marketing and export promotion. The time frame allowed for its preparation was approximately four (4) weeks immediately following the lifting of restrictions associated with the COVID-19 global pandemic and this constrained somewhat the methodology used in its preparation.

## 2. Background

The National Development Framework (NDF) for Belize (2010-2030), proposes key long-term economic goals of **building economic resilience, promoting productivity and competitiveness** and **ensuring the environmental sustainability of economic activity** within a coherent and consistent macro-economic policy framework. Sustainable increases in agricultural production, increased local value-added through agroprocessing, tourism sustainability and profitability, development of entrepreneurs, small businesses and the workforce, as well as timely investments in key economic infrastructure are other goals. The development of the domestic market is recognized as an important springboard for exports along with increased access to finance for farmers, increased government investment in technology, irrigation, development of seeds and green pesticides, provision of technical support to farmers through rebuilding of demonstration plots across the country, implementation of a new tax regime for agriculture supportive of production and support to sustainable fisheries and sustainable and responsible tourism. Consistent with the objectives of this document, the NDF also envisions the targeting of selected new sectors with growth potential.

The vision of Belize's National Export Strategy (2015-2019) is "sustained international competitiveness in the export performance of value-added and niche products and services, thereby contributing to the achievement of national development and poverty reduction" (Revised NES 2015-2019, p.7). A key component of the NES development objective was to enhance the capacity of the businesses in priority export sectors to take advantage of trading opportunities and agreements, particularly those provided by the CARICOM Single Market and Economy (CSME), the Economic Partnership Agreement (EPA) and other FTAs, the Partial Scope Agreement (PSA) with Guatemala and other agreements that Belize was in the process of negotiating (El Salvador, Mexico, and Honduras). Integration with global supply chains was also a stated goal for increasing national competitiveness. Priority sectors were indicated as agriculture, agro-processing and light manufacturing, fisheries and marine products, energy including biofuels, ICT services, professional services and tourism services.

The Competitiveness perspective proposed that measures be implemented to expand the narrow export base through diversification, address the low level of innovation to enhance value added production and enhance low productivity levels relative to the competition. The development of national capacity in relation to Intellectual Property Rights was seen as a key feature of building innovation and supporting the growth of SME and export. Creating awareness at the national level, identifying products to benefit from capacity building, evaluating legal provisions and systems, enacting an improved Incentives Regime related to the

issue of taxation on the inputs of production, as well as the provision of workshops on trade agreements were seen as key contributors to foster better understanding, capturing opportunities and improving the utility of same. Investments in product innovation were also seen as a prerequisite for continued international competitiveness and sustainability. An innovation centre for new product development and the outsourcing of product development services to established centres in the region were recommended until the local capacity was developed (Revised NES 2015-2019, p.11).

The NES noted that Belize had already developed a Sustainable Energy Strategy (2012-2033) as the national energy policy framework to transition the energy sector and the economy toward low carbon development. The strategy recommended a focus on biofuels and the development of the local energy sector to focus on indigenous renewable resources, including biomass feedstock from the agriculture, agro-processing and forestry sectors, hydropower and wind energy in feasible locations.

The National Trade Policy (2019- 2030) developed by the Ministry of Economic Development, Petroleum, Investment, Trade and Commerce in February 2019 was expected to positively contribute to trade and export development for merchandise as well as services, while generating appetite for a robust industrialisation agenda to assist the country in the creation of employment, wealth and prosperity, in line with the vision of Horizon 2030. "Promoting Competitiveness" is one of three main principles underpinning the Trade Policy and the document notes that the current multilateral trading system thrives on efficient and integrated production systems, quality assurance and competitiveness. Consequently, the recommendations proposed are that for effective market access, Belizean producers must ensure that their products and services are competitive by producing efficiently, meeting international standards and quality and integrating into regional and/or global value chains.

Export of services was also an area of potential highlighted in the National Trade Policy aligned with CARICOM's development agenda. Belize has identified six priority services sectors in the areas of spa and wellness, music, real estate, ICT, Business Process Outsourcing (BPOs) and professional services. It is anticipated that the National Trade Policy would provide a policy framework for the expansion and promotion of exports, including services to take advantage of opportunities provided by CARICOM, EPA, and other future trade agreements, including the recently concluded CARIFORUM- UK EPA related to Brexit.

In the implementation of its national development plans, Belize has made progress in both the development of policy measures and their practical implementation. An Economic Development Council (EDC) in the Office of the Prime Minister has been functioning as the Government of Belize's official mechanism for dialogue between the public and private sectors, providing advice to the government on impediments affecting the private-sector and providing recommendations on strategic courses of action for bringing about improvements to the delivery of public services. The EDC is established by **Act No. 38 of 2017** and is tasked with strengthening the collaboration between public and private sectors through meaningful

dialogue that leads to positive outcomes facilitating economic development as well as facilitating the development of reforms that improve doing business, enhance the public sector processes and enhance confidence of doing business in Belize. The Technical Secretariat, the Public-Private Desk (PPD), has set a high standard of excellence, efficiency, diligence and impartiality in its mandated execution of critical reform initiatives. By way of example, the Council has developed and fast-tracked comprehensive legislation to support Ecommerce enabled enterprise in Belize.

The Belize Bureau of Standards has spearheaded the development of a National Quality Policy which at the time of writing is being submitted to Cabinet. Among other issues, this policy will clarify the National Quality Infrastructure Framework, which will provide for shared responsibility for quality among key public and private stakeholders. The Bureau, which was established 30 years ago, operates an accredited lab for metrology, which has the potential to monitor traceability systems. It has also developed internal capabilities related to Certification and has collaborated with the Department for the Environment in the creation of standards for biodegradable products, including packaging, which is possibly a first for the Caribbean region. In collaboration with the Belize Agricultural Health Authority, the Bureau has developed a voluntary third-party assurance scheme which includes major globally recognised standards including GlobalGAP, HACCP and ISO standards. This means that local capacity to manage the implementation of these standards is available locally.

The Ministry of the Blue Economy and Civil Aviation is preparing a National Blue Economy Strategy and Policy, which prescribes the enabling environment for diversification into the related economic subsectors.

### **3. Situational analysis**

#### **i. Global Competitiveness Context**

The ITC's Monthly Briefs on the Global State of Trade analyze trade data to identify monthly variations in goods exports across countries, regions, and sectors. According to data published in April 2022, global exports grew by 19% in February 2022, as compared to February 2021, despite the extended presence of the global pandemic. Export performance year-on-year was strongest in Africa, where exports grew 41%, and weakest in the Pacific, where exports grew 5.1%. While trade in protective gears, medical devices and supplies to address the health crisis would have contributed to buoyancy in global trade, an expansion of exports across more traditional productive sectors also emerged as shown in Figure 1 below. Minerals exports grew 49%, while agriculture, fisheries, food exports grew 17%, and Manufacturing exports grew 14%, compared to one year earlier. This global expansion is indicative of a need for increasing focus on productivity and competitiveness by producers in developing countries, led by sector-specific and market-specific focus on potential opportunities.

Beyond trade, based on the disruption caused by COVID19 to supply chains and the more recent war in the Ukraine, consumers across the globe have been experiencing increasing food prices, while producers battle instability in supply chains, inflation, impact of climate change on crops, higher costs of fertilizer, unstable energy prices and higher costs of transportation and logistics. These trends mandate a focus on reducing transaction costs in export and strategizing towards greater integration with global supply chains and use of technology to achieve gains in productivity.

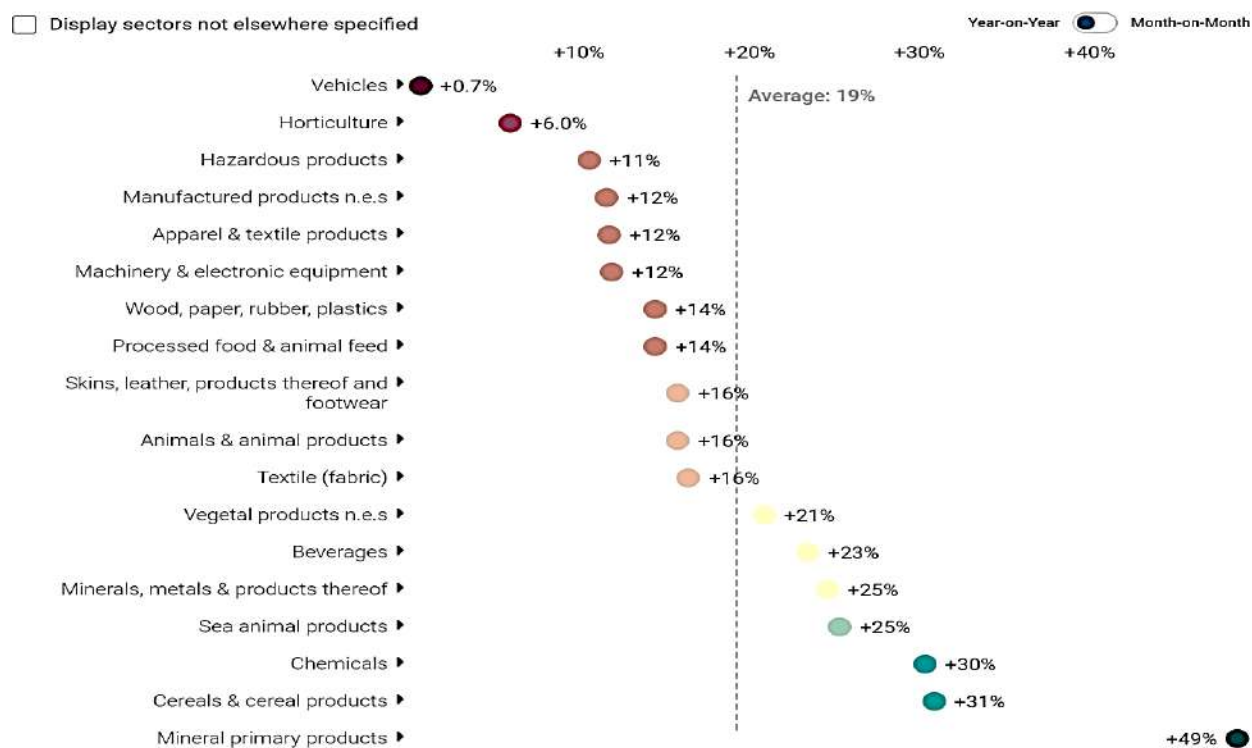
Another concern is a proliferation in Technical Barriers to Trade (TBTs). These are mandatory product standards applied by countries to imported products which reflect measures to protect health and safety of consumers or protection of the environment. Typically, they include health regulations on food quality, additives, contaminants, toxins, packaging and /or labelling and minimum safety standards for manufactured products. Also increasing are Sanitary and Phyto-sanitary regulations, which aim to protect human, animal or plant life or health from pests and diseases. In January 2022, the ITC reported that a growing number of SPS and TBT notifications had been observed against the backdrop of increasing global trade (72 countries submitted 544 notifications in January 2022)<sup>1</sup>. These conditions indicate that countries must place increasing emphasis on quality of input supplies, traceability and quality testing capabilities, expertise and infrastructure, to support export sectors.

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<sup>1</sup> Source: ITC Monthly Briefs on the Global State of Trade (March 2022)  
<https://tradebriefs.intracen.org/c14dd45c-c23e-4695-9746-ee782652b568>



**Figure 1 (below): Global year on year expansion of exports by sector**  
**Year-on-Year Change in Exports by Sector: February 2022**



Source: ITC Trade Map, Trade Data Monitor, and national sources (2022)

Source: ITC Trade Briefs Newsletter, April 2022

## ii. Belize Trade Performance and implications for national competitiveness

### a) Export Profile

The most significant Belizean exports are shown in Table 1 below. Traditional exports of sugar, bananas and orange concentrate remained the largest exports by volume and value for trade in goods. While export of bananas grew year on year over the past three years, sugar and orange concentrate export contracted over the period.

As shown in Table 2 below, when reviewed by SITC Rev. 4 classification, *food and live animals* were the most dominant category of goods exports in 2020, followed by *manufactured goods* and *chemical products*. Exports of *chemical products* grew over the previous year in 2020, while *manufactured goods* and *food and live animals* contracted.

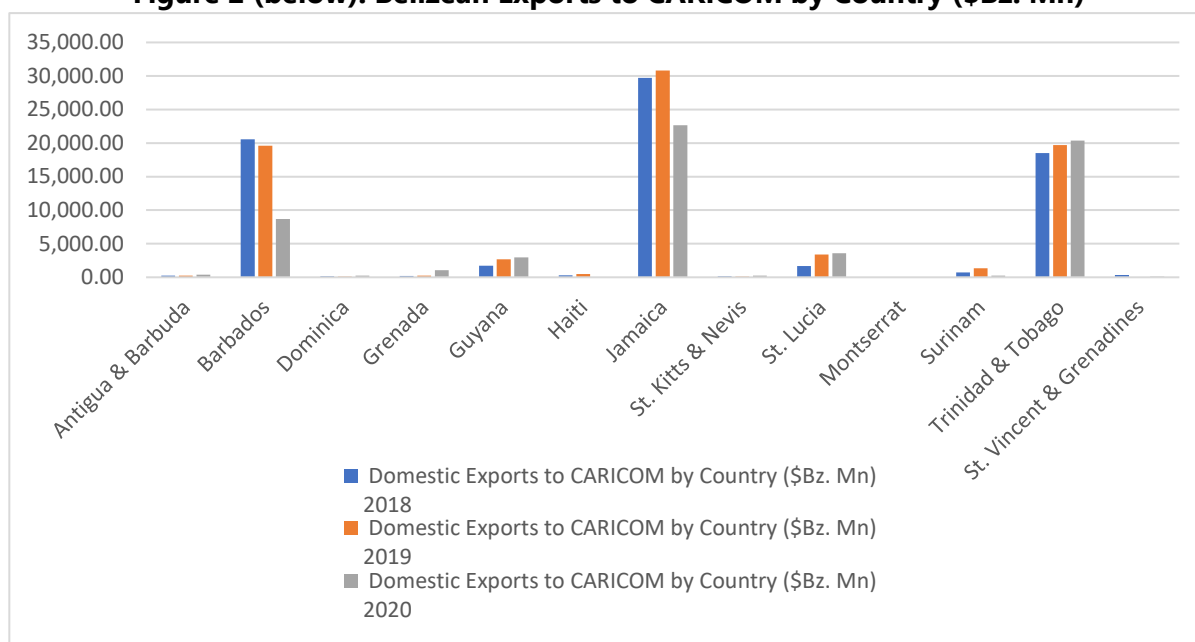
Exports of all products from Belize to CARICOM were valued at US\$35.987million in 2020 and grew by 21% over the previous year (ITC/ COMTRADE data). The top 10 products traded and the volume of trade are shown in Table 3 below. Major CARICOM markets for Belizean products are Barbados, Jamaica and Trinidad and Tobago. Exports to Antigua & Barbuda, Dominica, Grenada, Guyana, St. Kitts & Nevis, St. Lucia, Trinidad & Tobago and St. Vincent & Grenadines grew in 2020, while the other markets contracted. The three -year trend is shown in Figure 2 below.

<b>Table 1: Major Domestic Exports (Volume and Value)</b>			
Sub description	2018	2019	2020
Marine Products/ Quantity (Million Lbs)	3.05	3.08	2.30
Marine Products/ Value (\$Bz Mn.)	42.39	48.77	39.17
Sugar/Quantity (Thousand Long Tons)	158.88	199.29	128.62
Sugar/Value (\$Bz Mn.)	112.77	136.36	111.46
Molasses/Quantity (Million Gal)	10.07	13.15	11.15
Molasses/Value (\$Bz Mn.)	6.28	10.08	10.78
Orange Concentrate/Quantity (Million Gal)	2.29	1.65	1.85
Orange Concentrate/Value (\$Bz Mn.)	57.98	42.11	39.41
Grapefruit Concentrate/Quantity (Million Gal)	0.14	0.16	0.11
Grapefruit Concentrate/Value (\$Bz Mn.)	4.13	5.38	3.34
Banana/Quantity (Million Lbs)	177.25	184.72	203.25
Banana/Value (\$Bz Mn.)	74.27	79.52	86.99
Sawn Wood /Quantity (Thousand Bdft)	0.64	0.49	0.34
Sawn Wood/Value (\$Bz Mn.)	4.33	3.75	2.58
Papayas/Quantity (Million Lbs)	2.37	0.74	0.95
Papayas/Value (\$Bz Mn.)	1.02	0.32	0.41
Crude Petroleum/Quantity (Million Gal)	8.39	8.85	3.15
Crude Petroleum/Value (\$Bz Mn.)	24.65	20.33	4.89
Other Exports Value (\$Bz Mn.)	66.08	67.35	68.28
Source: The Belize National Statistical System Portal, <a href="https://app.sib.org.bz:8443/ords/f?p=134:1:17192135229444">https://app.sib.org.bz:8443/ords/f?p=134:1:17192135229444</a> Note: Bz\$2.0175= US\$ 1.0000 (19 May 2022, <a href="https://www.centralbank.org.bz/">https://www.centralbank.org.bz/</a> )			

<b>Table 2: Domestic Exports by Section of the SITC Rev. 4 (\$Bz Mn)</b>			
Sub description	2018	2019	2020
Food and Live Animals	341.51	367.43	340.48
Beverages and Tobacco	1.08	2.72	1.64
Crude Materials	7.64	6.89	4.75
Mineral Fuels & Lubricants	24.68	20.37	4.90
Oils and Fats	0.18	1.77	1.86
Chemical Products	12.40	5.81	6.37
Manufactured goods	5.97	8.40	6.74
Mach. & Transport Equipment	0.09	0.07	0.17
Other Manufactures	0.36	0.52	0.41
Source: The Belize National Statistical System Portal, <a href="https://app.sib.org.bz:8443/ords/f?p=134:1:17192135229444">https://app.sib.org.bz:8443/ords/f?p=134:1:17192135229444</a> Note: Bz\$2.0175= US\$ 1.0000 (19 May 2022, <a href="https://www.centralbank.org.bz/">https://www.centralbank.org.bz/</a> )			

<b>Table 3: Caribbean Community (CARICOM)'s top 10 imports from Belize</b>				
Product code (HS – 2 digit)	Product label	Value (US\$000's)		
		2019	2020	2021
<b>'TOTAL</b>	<b>All products</b>	<b>34810</b>	<b>29657</b>	<b>35987</b>
'20	Preparations of vegetables, fruit, nuts or other parts of plants	16169	12127	11755
'17	Sugars and sugar confectionery	5472	5537	11166
'07	Edible vegetables and certain roots and tubers	4613	3628	6322
'11	Products of the milling industry; malt; starches; inulin; wheat gluten	1202	1570	1254
'48	Paper and paperboard; articles of paper pulp, of paper or of paperboard	615	837	1095
'03	Fish and crustaceans, molluscs and other aquatic invertebrates	2751	1457	1045
'22	Beverages, spirits and vinegar	61	0	808
'10	Cereals	389	1	748
'33	Essential oils and resinoids; perfumery, cosmetic or toilet preparations	400	245	559
'44	Wood and articles of wood; wood charcoal	492	78	280
Source: ITC TradeMap				

**Figure 2 (below): Belizean Exports to CARICOM by Country (\$Bz. Mn)**



Source: The Belize National Statistical System Portal

Note: Bz\$2.0175= US\$ 1.0000 (<https://www.centralbank.org.bz/>)

Other important export markets for Belize include Central America, the EU, UK and US and Central America.

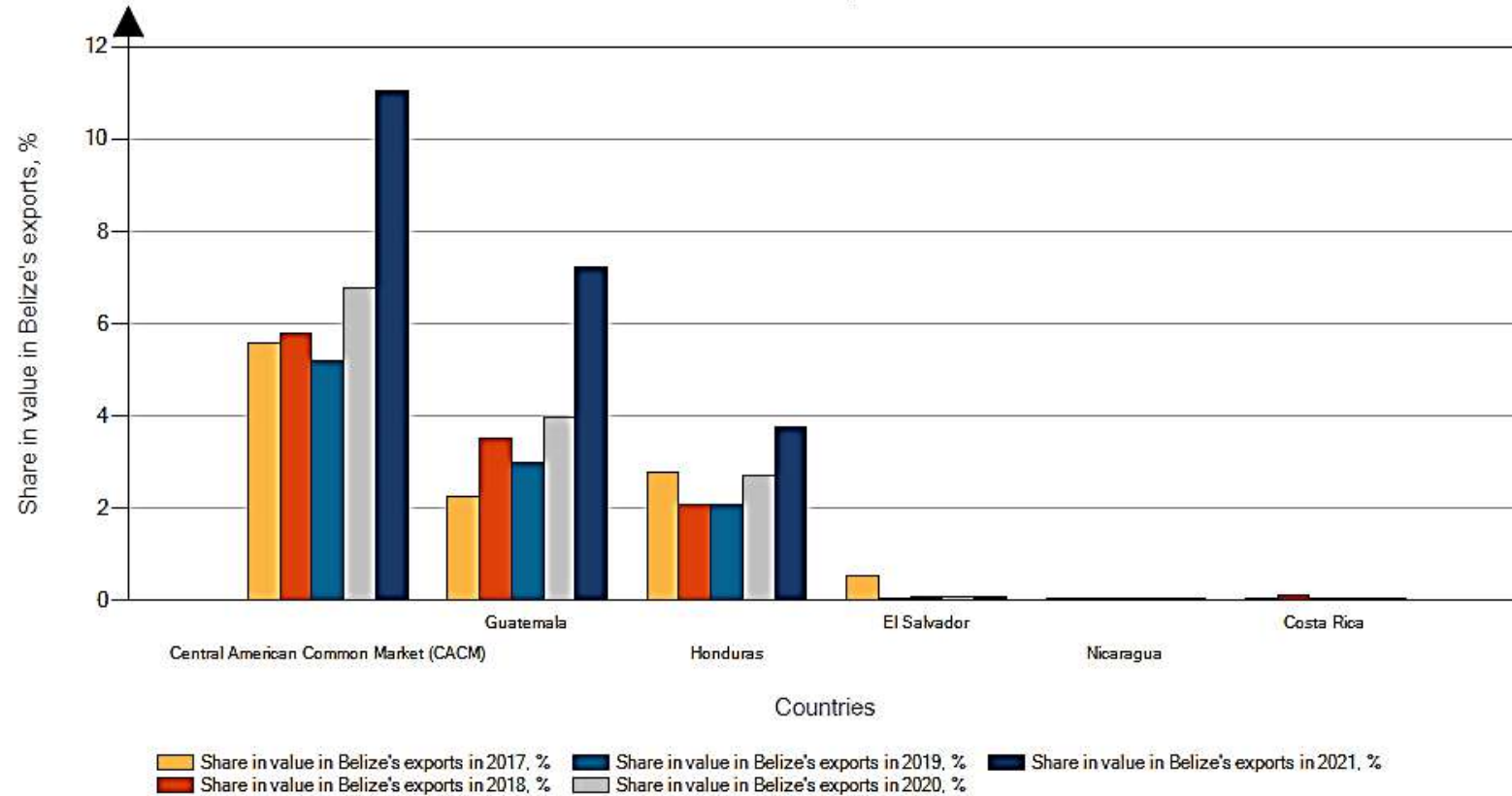
Belize's exports to the Central American Common Market, comprising Costa Rica, Guatemala, El Salvador, Honduras and Nicaragua totalled US\$28.433 million in 2021, expanding by 98% over the previous year, largely as a result of increased trade in most of the top 10 export product lines as shown in Table 4 below.

<b>Table 4: Belize's top 10 exports to Central American Common Market (CACM)</b>				
<b>Product code</b>	<b>Product label</b>	<b>Value (US\$000's)</b>		
		<b>2019</b>	<b>2020</b>	<b>2021</b>
<b>'TOTAL</b>	<b>All products</b>	<b>12754</b>	<b>14347</b>	<b>28433</b>
'23	Residues and waste from the food industries; prepared animal fodder	3974	5829	13464
'24	Tobacco and manufactured tobacco substitutes	4984	5729	9683
'72	Iron and steel	833	830	1943
'27	Mineral fuels, mineral oils and products of their distillation; bituminous substances; mineral ...	24	15	806
'10	Cereals	726	492	782
'21	Miscellaneous edible preparations	278	355	429
'17	Sugars and sugar confectionery	46	152	392
'84	Machinery, mechanical appliances, nuclear reactors, boilers; parts thereof	272	84	317
'70	Glass and glassware	136	156	102
'20	Preparations of vegetables, fruit, nuts or other parts of plants	153	33	78
Source: ITC TradeMap				

**Figure 3 (below): Key importing CACM markets for a product exported by Belize**

List of importing markets from Central American Common Market (CACM) for a product exported by Belize

Product: TOTAL All products



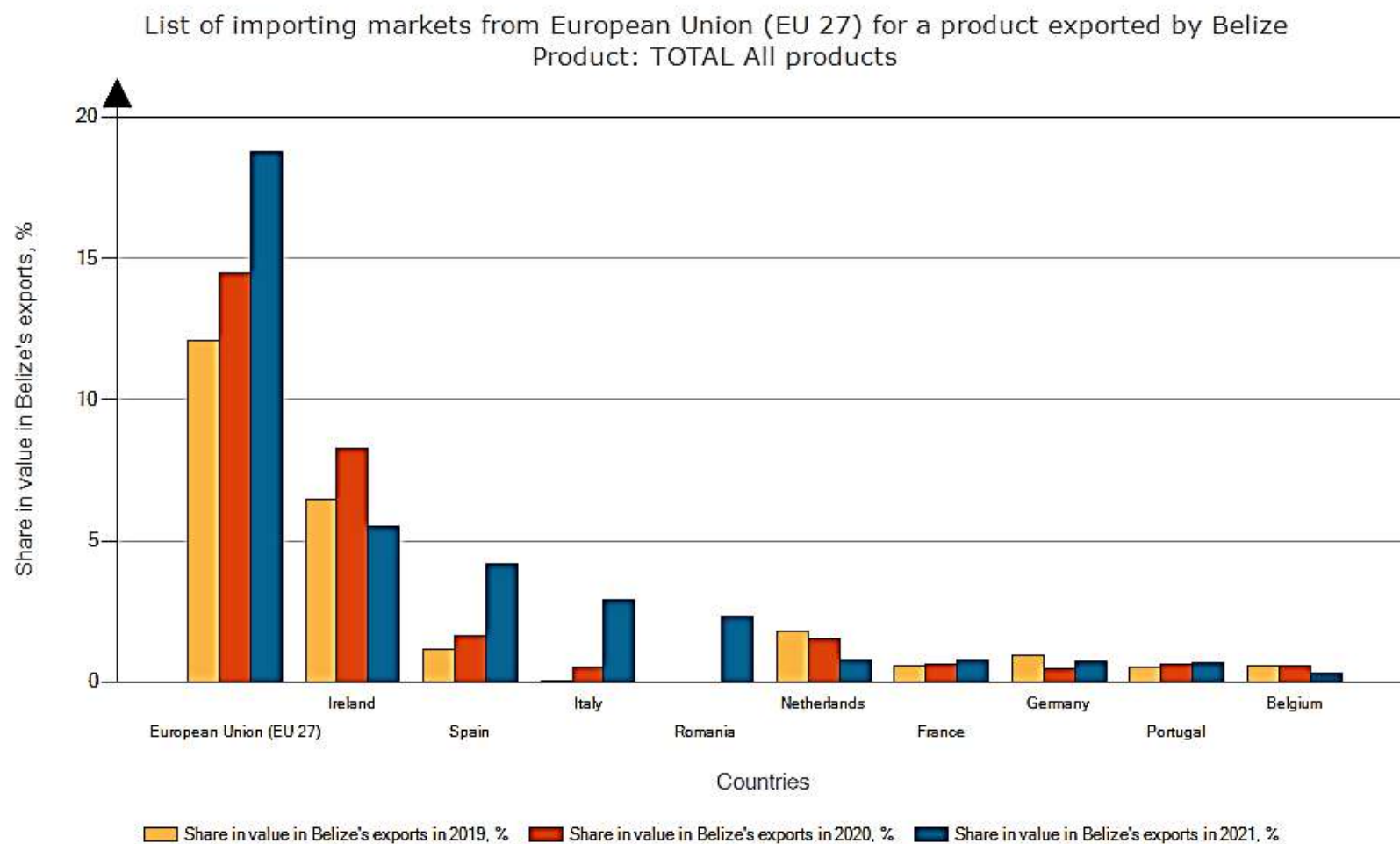
Source: ITC TradeMap

Exports to the EU27 were valued at US\$48.244 million in 2020 and increased by 57.6% over 2019 as shown in Table 4 below. The increase was primarily driven by an increase in exports of sugars and sugar confectionery, specifically, raw cane sugar in solid form (HS170114) and exports of frozen lobsters (HS030612 and HS030611). A new and emergent area of trade exports to the EU from Belize in 2021 *was residues and waste from the food industries; prepared animal fodder, specifically bran, sharps and other residues of maize, corn bran, sharps and other residues of maize corn* (HS 230210). While valued only at US\$14000 in 2021, the EU has recently introduced a suite of legislation known as the Green Deal which is intended to drive expansion in sustainable low carbon development. This will make products developed from waste significantly more attractive in the future.

<b>Table 4: Belize's top 10 exports to European Union (EU 27)</b>				
<b>Product code</b>	<b>Product label</b>	<b>Value (US\$000's)</b>		
		<b>2019</b>	<b>2020</b>	<b>2021</b>
<b>'TOTAL</b>	<b>All products</b>	<b>29619</b>	<b>30609</b>	<b>48244</b>
'17	Sugars and sugar confectionery	1306	3162	23757
'08	Edible fruit and nuts; peel of citrus fruit or melons	19010	20264	16291
'03	Fish and crustaceans, molluscs and other aquatic invertebrates	1832	1949	4637
'20	Preparations of vegetables, fruit, nuts or other parts of plants	3803	2728	1615
'22	Beverages, spirits and vinegar	374	558	693
'33	Essential oils and resinoids; perfumery, cosmetic or toilet preparations	1791	1117	649
'18	Cocoa and cocoa preparations	177	377	387
'21	Miscellaneous edible preparations	53	50	92
'44	Wood and articles of wood; wood charcoal	105	0	43
'07	Edible vegetables and certain roots and tubers	625	274	26
Source: ITC TradeMap				

As shown in Figure 3 below, the most important export markets in the EU27 for Belizean exports are Ireland, Spain, Italy, Romania and the Netherlands.

**Figure 3 (below): Key importing EU markets for a product exported by Belize**



Source: ITC TradeMap



Exports from Belize to the UK were valued at US\$68.482 million in 2021, contracting by 2% in comparison to 2020. The 2020 period also saw a decline of 29% in relation to 2019. As shown in Table 5 below, the key contributor to this was a severe contraction in sugar exports.

<b>Table 5: United Kingdom's top 10 imports from Belize</b>				
<b>Product code</b>	<b>Product label</b>	<b>Value (US\$000's)</b>		
		<b>2019</b>	<b>2020</b>	<b>2021</b>
<b>'TOTAL</b>	<b>All products</b>	<b>98509</b>	<b>70010</b>	<b>68482</b>
'08	Edible fruit and nuts; peel of citrus fruit or melons	34997	41210	51766
'17	Sugars and sugar confectionery	57831	23277	7471
'44	Wood and articles of wood; wood charcoal	2527	2079	2907
'84	Machinery, mechanical appliances, nuclear reactors, boilers; parts thereof	56	27	2172
'88	Aircraft, spacecraft, and parts thereof	0	0	2000
'22	Beverages, spirits and vinegar	1458	1203	710
'74	Copper and articles thereof	0	0	367
'85	Electrical machinery and equipment and parts thereof; sound recorders and reproducers, television ...	13	14	230
'94	Furniture: bedding, mattresses, mattress supports, cushions and similar stuffed furnishings; ...	60	0	128
'01	Live animals	259	144	127
Source: ITC TradeMap				

The United States is Belize's most important trading partner, with total exports in 2021 valued more than US\$70.2 million, an increase of 30.4% over the 2020 figure. The increase in exports was driven by increased export of *commodities n.e.s* and *rock lobsters*.

Table 6: United States of America's top 10 imports from Belize				
Product code	Product label	Value (US\$000's)		
		2019	2020	2021
'TOTAL	All products	60156	53849	70217
'99	Commodities not elsewhere specified	6826	2792	20192
'03	Fish and crustaceans, molluscs and other aquatic invertebrates	17986	14853	19505
'17	Sugars and sugar confectionery	12327	15986	15071
'20	Preparations of vegetables, fruit, nuts or other parts of plants	2969	5580	3011
'94	Furniture: bedding, mattresses, mattress supports, cushions and similar stuffed furnishings; ...	1060	341	2146
'44	Wood and articles of wood; wood charcoal	801	1453	1789
'21	Miscellaneous edible preparations	1237	1526	1744
'85	Electrical machinery and equipment and parts thereof; sound recorders and reproducers, television ...	271	287	1720
'07	Edible vegetables and certain roots and tubers	2204	1709	1203
'33	Essential oils and resinoids; perfumery, cosmetic or toilet preparations	376	961	824
Source: ITC TradeMap				

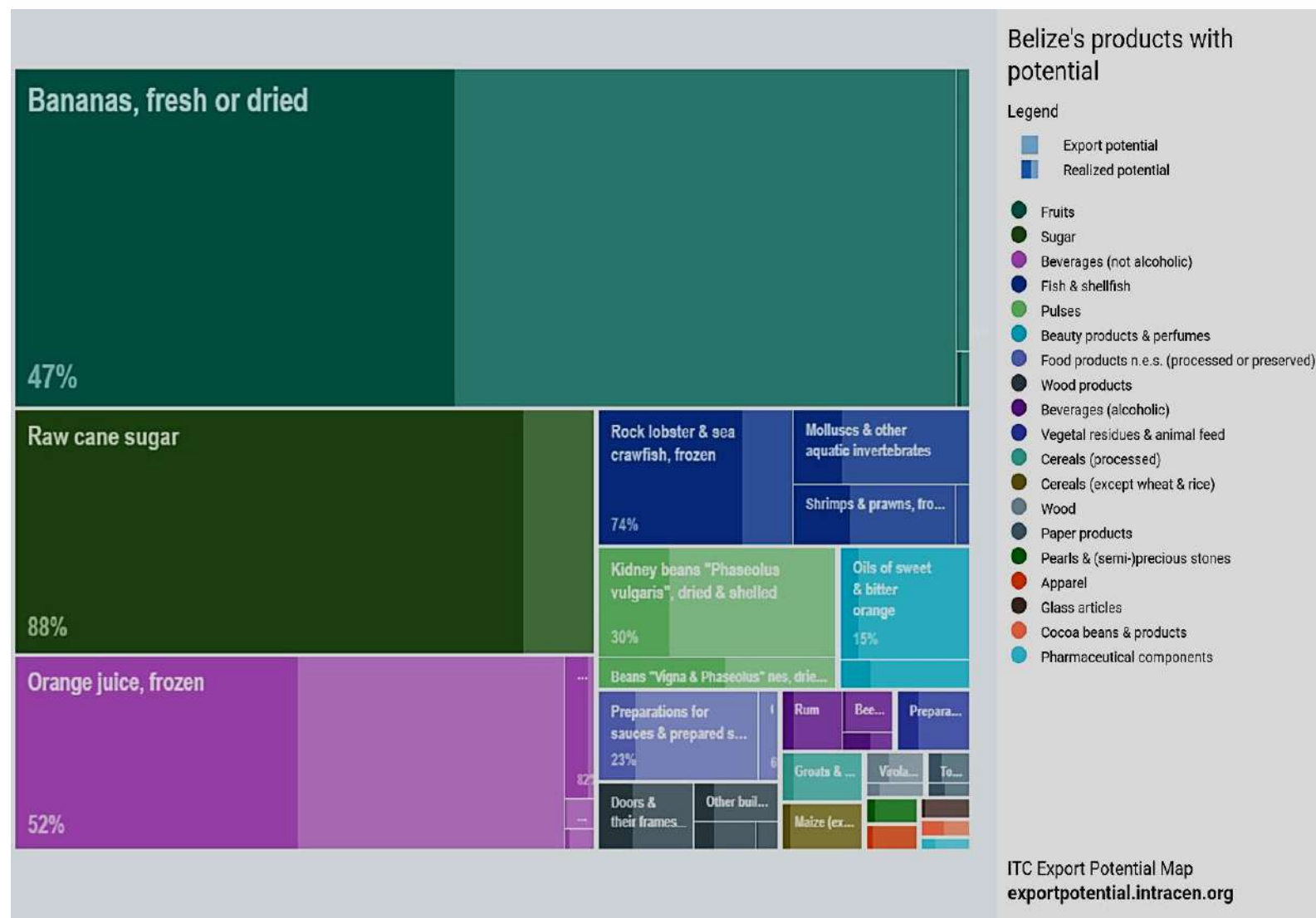
## b) Export Competitiveness

### i. Export Potential and New Product Diversification

The International Trade Centre (ITC) Export Potential Map provides timely and practical information on products, markets, and suppliers with untapped potential, and ranks new sectors with favourable chances of export success in the context of supporting sustainable development. It is recommended as a starting point in a decision-making process and be complemented with further research and stakeholder consultations.

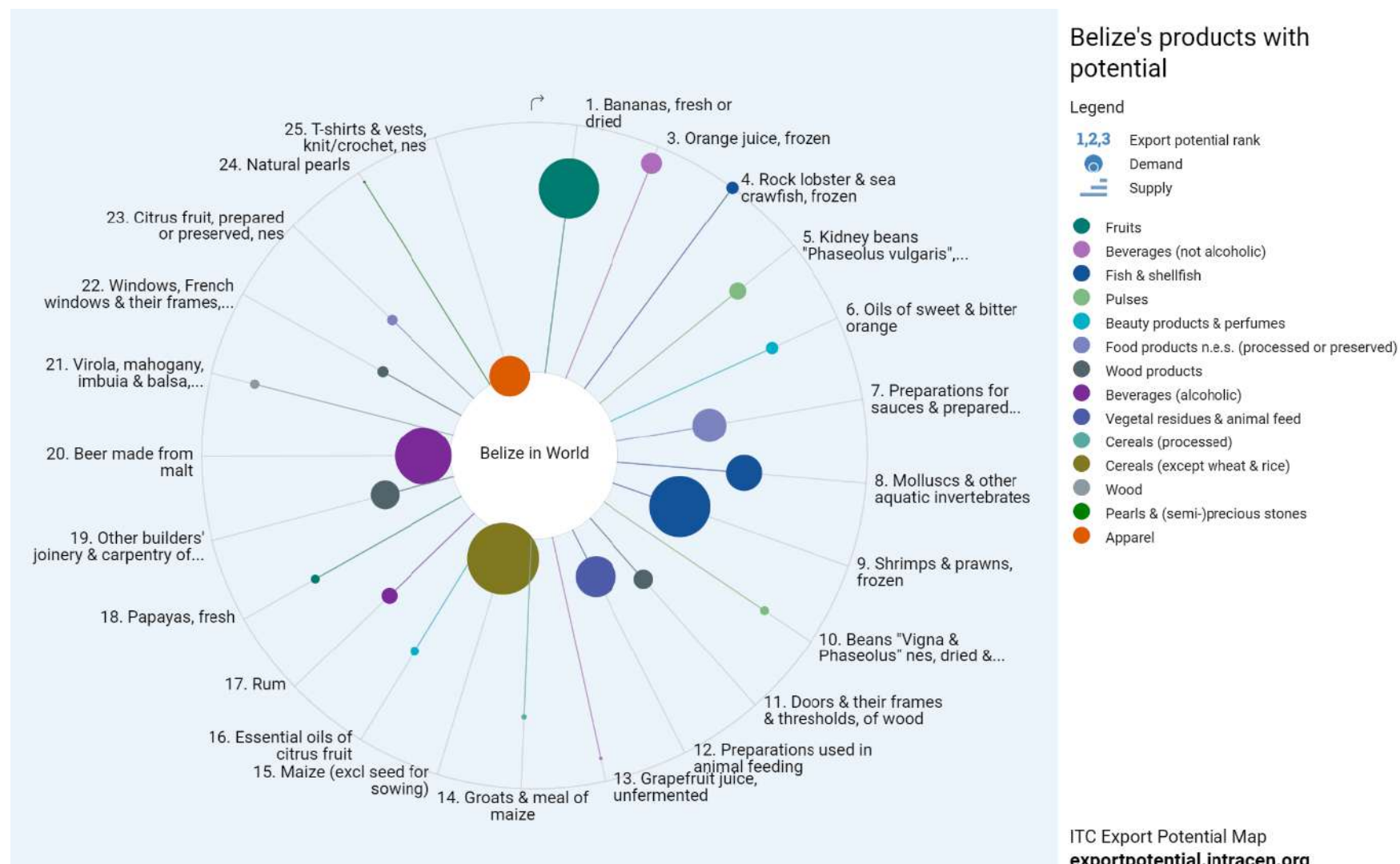
According to the Export Potential Map, the products with greatest global export potential from Belize are *Bananas, fresh or dried*, *Raw cane sugar*, and *orange juice, frozen* (Figures 4 and 5 below). *Bananas, fresh or dried* shows the largest absolute difference between potential and actual exports in value terms, leaving room to realize additional exports worth US\$57 million. Figure 6 below summarizes Belize's best options for global export diversification i.e. new products in existing markets or value-added products which could be developed for new niche markets. These are *Lobster nes, frozen*, *Coffee, not roasted, not decaffeinated* and *Groundnuts, excl roasted or cooked*. Belize finds *Lobster nes, frozen* easiest to reach. *Soya beans* is the product that faces the strongest demand potential in World.

Figure 4 (below): Belize's products with Export Potential



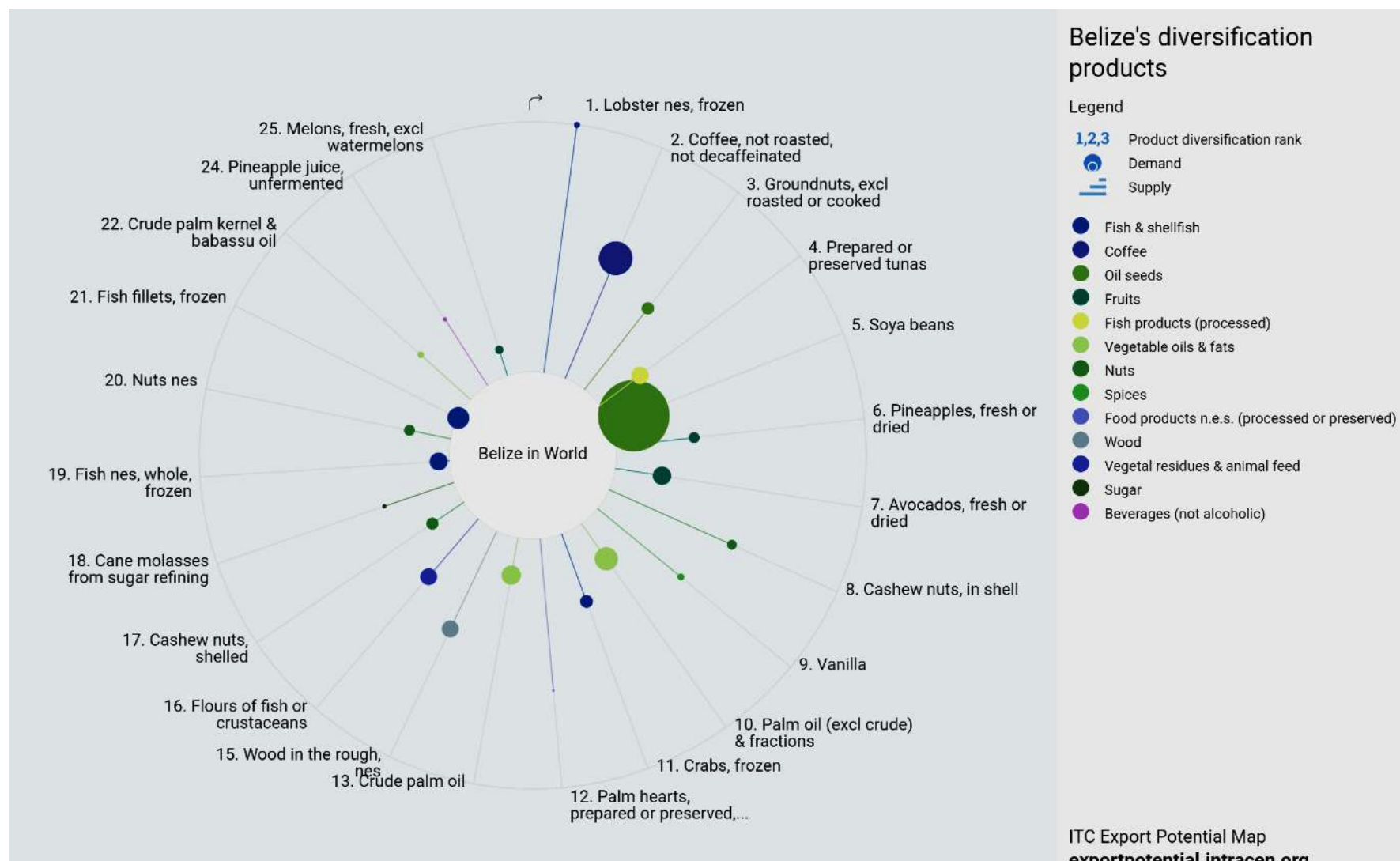
Source: ITC Export Potential Map

**Figure 5 (below): Products with best Export Potential**



Source: ITC Export Potential Map

**Figure 6 (below): Best prospects for export diversification**



Source: ITC Export Potential Map

## ii. New Market Development

Relatively small volumes of Belize's exports have been inconsistently detected in an impressive range of countries, as far away as Australia, Romania and Japan, as indicated in Figure 7 below. Based on the computations by the ITC TradeMap for 2021 exports, there is scope for expansion into markets indicated in yellow, namely, **Guyana, Germany, the United States, United Kingdom, Romania and the Netherlands**. In these markets, the rate of growth of Belizean exports into the market is less than the rate of growth of imports to these partners from the world, or in other words, the import growth from the world is faster than the rate at which Belize is growing exports to these markets, and as such, there are low hanging fruits in terms of market opportunities which are being lost based on the historical trade patterns. To capture these opportunities, existing exporters should scale their exports through strategic market-based partnerships and increasing integration in supply chains, particularly through gaining standards and certification that are required to enter specific niches and value chains. For new or small exporters wanting to enter these markets without compromising the existing reputation of the country, some form of clustering and/or collaboration with more established exporters should be pursued. Table 7 below shows further details of the scope of the opportunities in these markets.

<b>Table 7: Low hanging fruits for market expansion of Belize's Exports in 2021</b>			
<b>Market</b>	<b>Share in Belize's Exports (%)</b>	<b>Annual growth in imports (%)</b>	<b>Share in world imports (%)</b>
Guyana	0.77	13	0.02
Germany	0.75	3	6.5
Netherlands	0.78	5	2.84
Romania	2.33	6	0.53
United Kingdom	25.53	1	3.15
United States	22.36	3	13.43

It may also be useful for existing and potential exporters to be guided by the prospects for growing versus declining markets in developing exports. Figure 8 below provides an indication of dynamic versus declining markets by examining the trends in relation to growth in demand based on average performance in the five years between 2017 and 2021. Here, the rate of growth of imports is used as a proxy for the likely growth in demand. Table 8 below shows further details of the dynamics of markets featured in yellow, for which the rate of growth of Belizean exports into the market is lower than the rate of growth of imports from the world. With the growth in global exports of the products considered averaging 3%, markets with lower growth such as the United Kingdom, Jamaica and Barbados would be seen to be declining. Markets with growth rates of 3% or higher, such as Guyana, the United States, Romania, Netherlands, Romania and Germany, would be considered as dynamic. Neither diagnosis of "declining" or "dynamic" could be considered permanent since rapid changes could already be

emerging in response to events such as the signing of a post-Brexit CARIFORUM-UK Economic partnership Agreement or fallout from the current war in Ukraine.

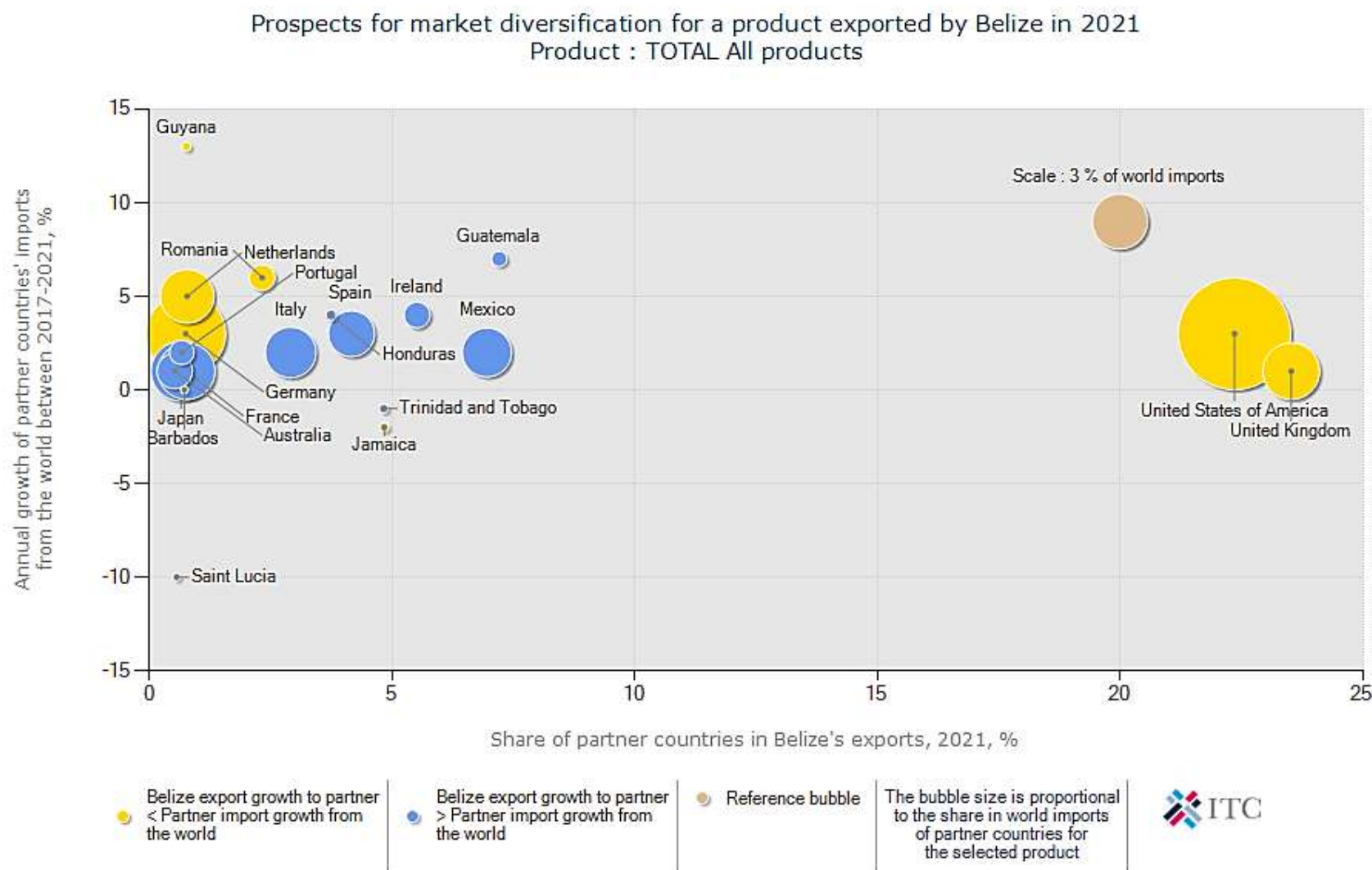
<b>Table 8: Dynamic versus declining markets for Belize's exports (2021)</b>				
	<b>Country</b>	<b>Annual Growth of Belize's exports (%)</b>	<b>Growth of imports (%)</b>	<b>Share in World Imports (%)</b>
<b>DYNAMIC</b>	Guyana	13	13	0.02
	Romania	4	6	0.53
	Netherlands	-44	5	2.84
	Germany	-11	3	6,5
	USA	-10	3	13.43
<b>DECLINE</b>	UK	-6	1	3.15
	Barbados	-30	0	0.01
	Jamaica	-6	-2	0.02
Source: ITC TradeMap based on Statistical Institute of Belize statistics				

For markets indicated in blue, where historical market conditions indicate a likely lower, or slower growth orientation, exporters should build out their strategy to carefully compete in specific niches, based on innovative products, unique commercial partnerships (including distribution partnerships) and excellent customer service and a buyer-centric delivery focus. A laser focus on competitiveness and market requirements is necessary to face the likely highly competitive market conditions. Market intelligence, research and testing are required to confirm the viability of pricing strategy. Disruptive innovations are welcome in this context but will require reliable and sustainable medium-term sources of **appropriate** financing.

Figure 9 below shows concentration and average distance for Belizean product exports in relation to their destination countries. Several of the larger value exports, as indicated by the relative size of the bubble on the map, are travelling relatively longer distances. This will make their competitiveness highly vulnerable to increasing costs of logistics and transportation, which is an emergent reality triggered by the global pandemic and the increasing costs of oil/ energy. It is important that support be given to exporters in meeting the costs and challenges associated with transportation and logistics and that trade facilitation be optimised. Increasingly, countries are exploring the deployment of information technologies such as blockchain, to reduce the costs of these transactions by increasing efficiency and transparency of trade facilitation processes. In the future there may be feedback from certain markets concerned with the impact of the environmental footprint of products in the context of climate change. Modern sustainability trends favour production near consumption as far as possible. It is therefore important to pay attention to the prospects for supplying markets closer to home.



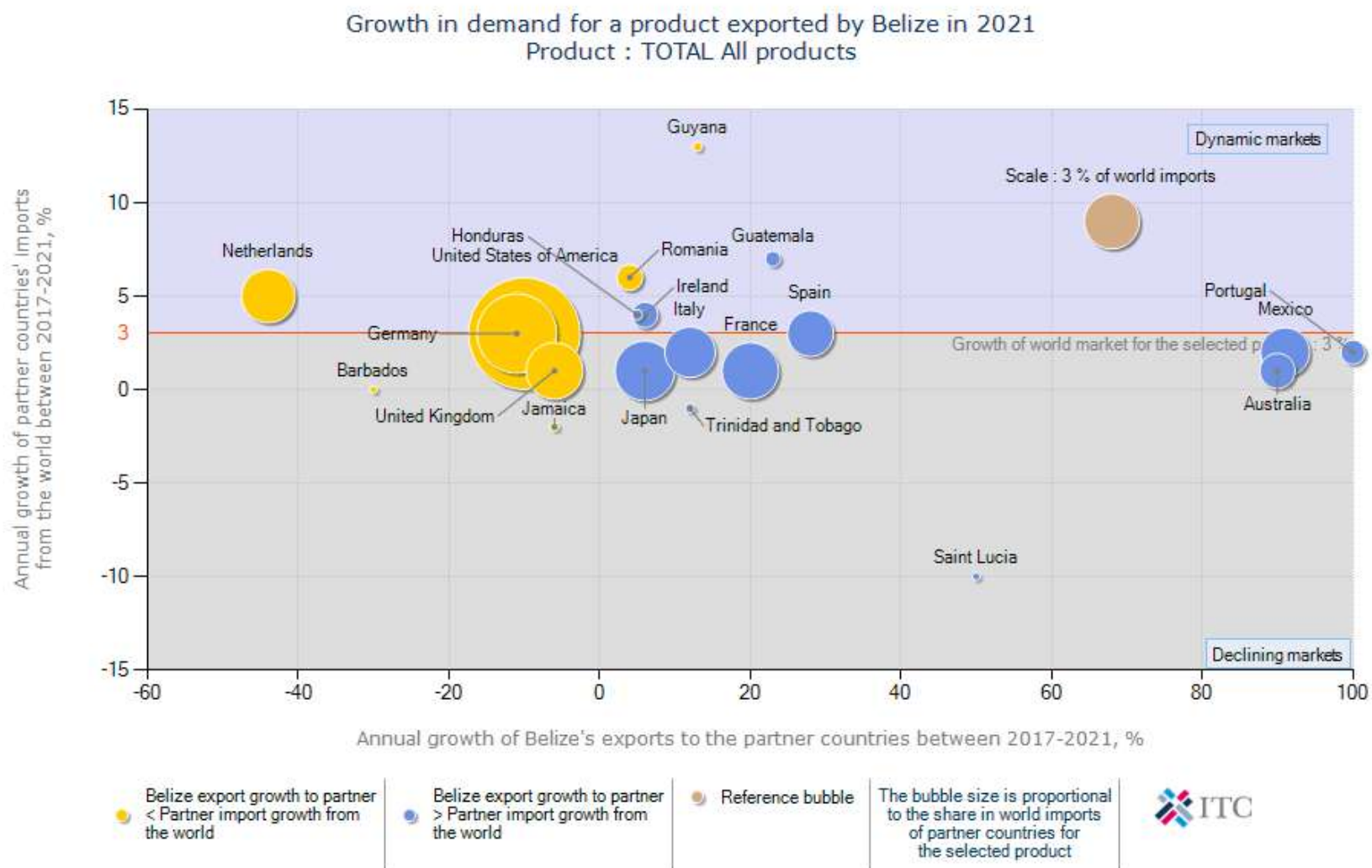
**Figure 7 (below): Low hanging fruits for market expansion of Belize's Exports in 2021**



Source: ITC TradeMap based on Statistical Institute of Belize statistics

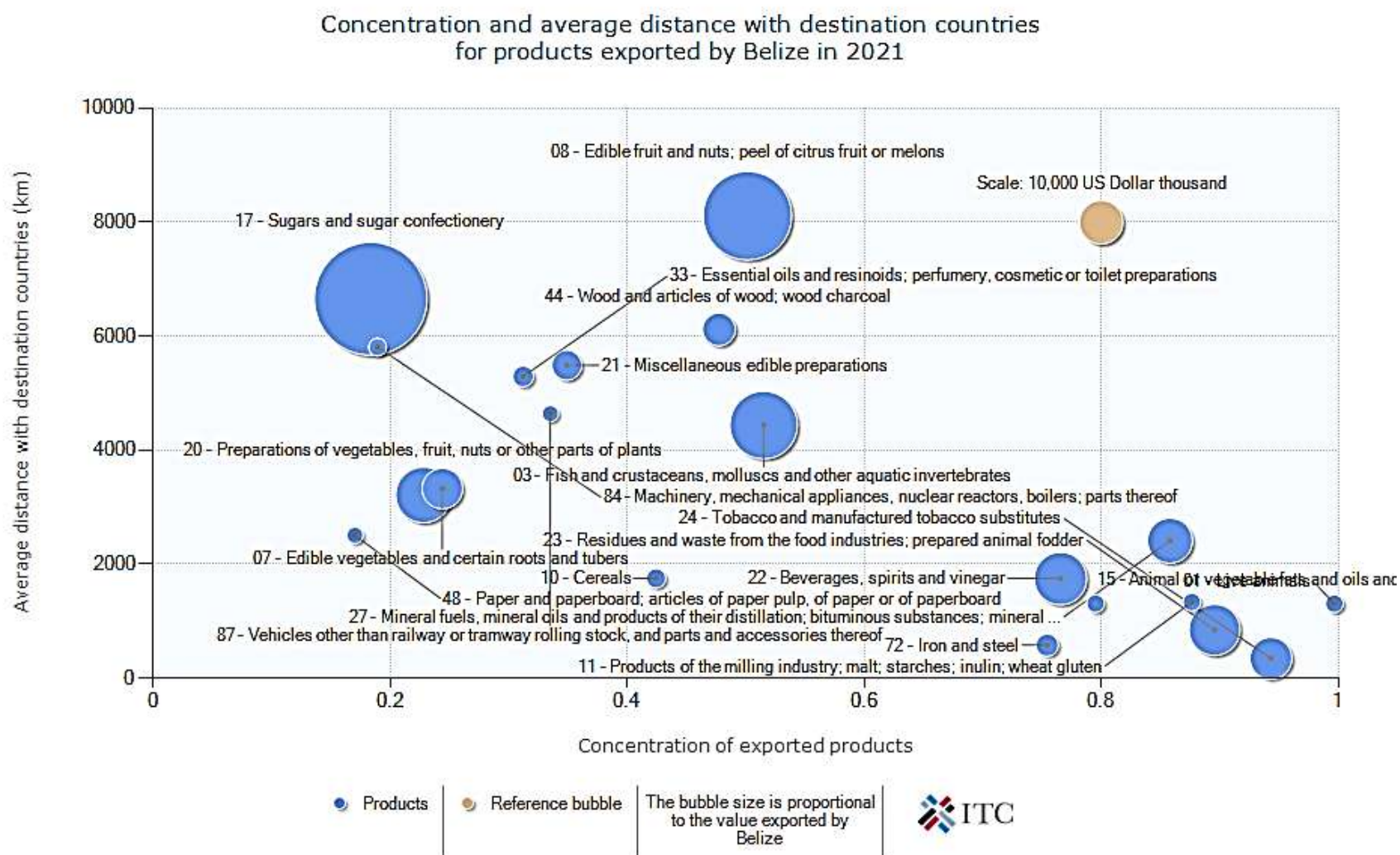


**Figure 8 (below): Dynamic versus declining markets for Belize's exports (2021)**



Source: ITC TradeMap based on Statistical Institute of Belize statistics

**Figure 9 (below): Concentration and average distance with destination countries for Belize exports (2021)**



Source: ITC TradeMap based on Statistical Institute of Belize statistics

### iii. Legal and institutional framework for export facilitation and existing approaches to export development

A summary of the 2017 WTO Trade Policy Review<sup>2</sup> states that Belize is a member of the Caribbean Community and Common Market (CARICOM) and applies the CARICOM common external tariff with several exceptions. CARICOM has signed bilateral trade agreements with five Latin American countries: Colombia, the Bolivarian Republic of Venezuela, Dominican Republic, Costa Rica, and Cuba, under which Belize is entitled to preferential duty-free treatment for goods on a non-reciprocal basis. However, only the agreements with Costa Rica and Cuba have been ratified. Belize also has a partial scope agreement with Guatemala and is engaged in negotiations for similar agreements with El Salvador and Mexico. It is also a member of the Central American Integration System (SICA). Belize, through CARICOM, signed the Economic Partnership Agreement (EPA) which gives it quota-free and duty-free access to the EU. In addition, Belize has preferential access to the United States through the Caribbean Basin Initiative (CBI), to Canada under CARIBCAN, and qualifies for General System of Preferences (GSP) treatment from several other countries.

The Belize Trade and Investment Development Service (BELTRAIDE) is a statutory body of the Government of Belize operating under the Ministry with responsibility for Investment, Trade and Commerce. The mission of BELTRAIDE is enhancing Belize's prosperity by fostering investor confidence, entrepreneurship, business growth and innovation. Its vision is enabling a dynamic and competitive business environment for Belize's Socio-economic development. Micro, Small and Medium Enterprise (MSME) Development is a key element of the BELTRAIDE core responsibilities agency is host to a Small Business Development Centre (SBDCBelize) responsible for implementation of the MSME and Entrepreneurship Policy and Strategy (2008). Other sub-units of BELTRAIDE are BelizeINVEST, Belize Training and Employment Centre (BTEC) and EXPORTBelize. Widely recognised as a business and investor friendly country, the government offers a suite of competitive incentives to prospective investors. These include attractive Fiscal Incentives and concessions; Commercial Free Zones; Export Processing Zones; repatriation of profits and dividends. Key sectors targeted for investment promotion include *Agri-business and Agro-processing, Fisheries and Aquaculture, Sustainable Energy and Light Manufacturing and Logistics*.

EXPORTBelize offers a range of support services for internationalization, including capacity building workshops and training, technical assistance, facilities inspection, identification of viable export markets and other trade and business intelligence, market promotion of products and services through trade shows and planning/ preparation for export, including planning and financing. The services are generally demand-driven and customised to the needs of individual exporters and potential exporters.

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<sup>2</sup> WTO (2017), Trade Policy Review: Belize (Executive Summary), retrieved from [https://www.wto.org/english/tratop\\_e/tpr\\_e/tp453\\_e.htm](https://www.wto.org/english/tratop_e/tpr_e/tp453_e.htm) in May 2022

For five years. BELTRAIDE has been organising a National Competitiveness Month with a focus on innovative activities to provide an evolved ecosystem of services and products that improves MSME competitiveness in local and international markets. Activities include workshops and discussions on a wide range of practical topics for entrepreneurs at various stages of business development.

Other recent initiatives include the launch of a Digital Impact Fund, supported by the Inter-American Development Bank (IDB) Lab. The initiative is linked to COVID-19 recovery and resilience supporting the digitalization of Caribbean financial institutions and their micro, small or medium-sized enterprise (MSME) clients. The Objective of the Digital Impact Fund is to provide technical assistance to tech scale-up firms who are providing digital solutions tailored to the Caribbean MSME experience to increase the digitalization of MSMEs. The project seeks to increase the adoption of digital innovations that promote business and resilience and enhanced productivity among financial institutions and their MSME customers. In 2021, with the support of the UNDP, BELTRAIDE established a virtual knowledge centre to support e-learning, information sharing and B2B e-commerce.

Consistent with the Agenda 2030 goals in relation to gender, BELTRAIDE and the Ministry with responsibility for Economic Development and Investment, have also implemented a Female Entrepreneurship Program comprising capacity building workshops, advisory, and mentorship to foster the transfer of knowledge, business continuity and sustainability.

#### **4. Gap analysis**

##### ***i. Key global market trends and developments that have significant implications for Belize's exporters competitiveness***

At the firm level, exporters face numerous challenges in seeking to attain export competitiveness. The following is a brief analysis of key market trends and developments likely to impact Belizean exporters.

**Technology**, including information technology, is the most significant factor driving global markets today. It is reshaping all aspects of the supply chain and value chains, impacting product development, production and distribution to favour scaling, cost minimization and efficiency. Companies should be knowledgeable on levels of technological practices used in countries which are major trading partners, to determine the extent to which they are likely to compete successfully. Digitalization of business processes to increase efficiency and remote control of operations has been advanced by the pandemic and Ecommerce development is now an important standard practice for engagement of export buyers. **Trade Agreements**- For some time now, the number of trade agreements has been increasing globally. Trade agreements provide opportunities for the marketing of goods, but also for the sourcing of inputs (including packaging) and technologies on preferential terms. Exporters therefore need to maintain awareness on the provisions of trade agreements and the potential for productive partnerships and sourcing of inputs and technologies which could enhance their product and services offerings. Since governments spearhead trade agreements, good communication and

information sharing with the government through representative private sector associations are essential to realise gains from the trade negotiations process.

**Tourism**, which experienced shocks based on the pandemic, is currently rebounding globally and linkages with local tourism as a means of generating familiarity with local brands and cultural experiences, will once again become critical to growing the capacity of local firms to export.

**The Design Economy**- Traditionally, industrial development across the Caribbean has focused on primary industries and processing. In developed countries, commercialisation of products is driven by design. According to the UK Design Council, in 2016, the Design Economy, comprising a range of design industries, was projected to generate 85.2 billion pounds of gross value added (GVA) or 7% to the UK economy<sup>3</sup>. Design industries connect commercial products and services with consumers by solving unique problems or challenges. Failure to develop the design economy in the Caribbean has resulted in a disconnect with traditional mainstream markets. Sample industries within the Design Economy is shown in Box 1 below. An interesting feature of design industries is that they are particularly attractive to women and youth and therefore represent unique possibilities for employment and engagement of otherwise marginalised persons and groups. Globally, much attention is being given by policy makers to the Creative/ Orange Economy as well as prospects for industrial innovation as a conduit for economic growth. A buildout of the Design Economy would therefore offer unique prospects for new investments in non-traditional areas.

Box 1: Industries in the Design Economy		
Animation	Graphics	Web, UI, UX
Apparel	Healthcare	Motion Graphics
Architecture	Illustration	Packaging
Communication	Industrial	Product
Experience	Interactive	Textiles
Food	Interior	Transport
Furniture	Jewellery	Urban
Games	Land use	

**Sustainability**- Climate change and degradation of the environment have become major concerns globally. Sustainability of production in relation to the circular economy has become an increasing feature of demand and purchasing patterns in the consumer markets of some developed countries. This has given rise to new opportunities for products and services aligned with the Green Economy, recycling industries and certification. Traceability has become a critical requirement of products and production processes and this is leading to increased demand for use of standards and certification.

<sup>3</sup> Source: <https://www.designcouncil.org.uk/what-we-do/research/design-economy>

**Intellectual Property-** Geographic indications (GIs) are a collective certification of intellectual property, usually a sign used on products, which identify products as having a specific origin and possessing qualities or a reputation which can be directly linked to that origin. Geographical indications are typically used for agricultural products, foodstuffs, wine and spirit drinks, handicrafts, and industrial products. A geographical indication right enables those who have the right to use the indication to prevent its use by a third party whose product does not conform to the applicable standards. For example, in the jurisdictions in which the Darjeeling geographical indication is protected, producers of Darjeeling tea can exclude use of the term “Darjeeling” for tea not grown in their tea gardens or not produced according to the standards set out in the code of practice for the geographical indication <sup>4</sup>Beyond GIs, which support market access for members of a specific geographic grouping based on unique characteristics, there is potential for the use of collective certification marks/ branding to distinguish products which meet specific quality criteria. Joint marketing campaigns based on collective marks can potentially create visibility in export markets beyond the means and impact of individual brands. The strategic use of marketing campaigns built around individual product brands owned by companies is also an imperative in aiming to penetrate export markets. Companies with unregistered brands may easily find their marketing investments eroded by copycat brands or trademarks with rights to prior usage. Based on a history of primary production, strategic use of branding is typically an area of weakness for Caribbean firms.

## **ii. Stakeholder engagement on supply-side constraints**

Two roundtable discussions sessions were held as an input to the drafting of the Export Competitiveness RoadMap: one each with private sector and public sector leaders. Time constraints in implementing the project did not allow for the convening of a focus group with exporters on supply-side constraints, so to generate direct input into the RoadMap, companies were invited to participate in a brief survey in relation to supply-side constraints. Eleven (11) organizations responded, including a private sector association, entertainment company (creative services) and other producers. While not a statistically relevant survey, their feedback was nevertheless valuable in refining the strategic approach. The insights gained are detailed in Appendix 2 to this report. Some highlights are shared below.

- Most respondent firms were exporters (90.9%). A wide range of mainly agrifood products was produced by respondents, but also biotechnology-based fertilizers, animal nutrition and cleaning agents as well as cement packaging sacks. A similar range of products, with some diversification towards value added processing, is anticipated for future export marketing.
- There is significant future interest in processed food value chains (63.6%) , consumer products (45.5%), supply of inputs to manufacturers (45.5%) and supply of primary commodities (36.4%). Tapping into these export niches requires different export strategies. Supply of inputs to manufacturers and exportation of primary commodities

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<sup>4</sup> [https://www.wipo.int/geo\\_indications/en/](https://www.wipo.int/geo_indications/en/)



require a robust trade promotion programme of trade missions and business-to-business matchmaking, while processed foods and consumer goods require digital marketing, ecommerce and specialty trade shows.

- Traditional markets of the United States (72.7%) and United Kingdom (45.5%) and Jamaica (45.5%) are the most significant current export markets. The Netherlands, Portugal and Spain were also important. In the next five years, companies projected that the United States will also remain an important market, along with CARICOM, Central and South America. Some interest was also expressed in non-traditional markets as far away as Switzerland, Africa and the United Arab Emirates (UAE).
- A significant number of supply-side constraints in scaling production were attributed to trade facilitation challenges. Other issues were cited with consistent and reliable supplies of raw materials, challenges with attracting staff and recruiting labour and operational issues, including high production costs in the context of limited access to finance. With reference to specific challenges related to export, access to appropriate finance was the cause of the largest number of issues cited. Less than a third of respondents had websites and this could be considered as one measure of export readiness.
- Despite the limited number of company websites, fifty percent (50%) of respondents showed interest in technology adoption, as indicated by their experiences with agritech as digitalization. There was also a keen interest in certification and standards, including HACCP, ISO, Organic, US food safety, among others.
- The management of intellectual property among respondents showed mixed responses. Just less than fifty-six percent (56%) had registered their trademarks/brands as intellectual property. About fifty percent (50%) of respondents were interested in a collective branding concept with other producers and eighty-seven and a half percent (87.5%) were in favour of a national branding concept.

### ***iii. SWOT Analysis: Competitiveness of Belizean Exports in regional and global markets***

Box 2 below shows a summary SWOT analysis concerning the competitiveness of Belizean exports in regional and global markets.

<b>Box 2: SWOT Analysis of Belizean companies' Export Competitiveness</b>	
<b><i>Strengths</i></b>	<b><i>Weaknesses</i></b>
<ul style="list-style-type: none"> <li>• Culture and heritage, including culture related to agriculture</li> <li>• Established exporting community with experience in a range of products and markets</li> <li>• Tropical Climate</li> <li>• Abundance of natural resources, including land</li> <li>• Multilingual capability</li> <li>• Traditional knowledge</li> <li>• Engagement of women and youth in entrepreneurship and policy making</li> </ul>	<ul style="list-style-type: none"> <li>• Market intelligence</li> <li>• Market promotion</li> <li>• Access to appropriate finance and lack of dedicated financing models for export</li> <li>• Implementation of standards and certification</li> <li>• Research and product development capability</li> <li>• Packaging and labelling in accordance with global commercial standards and market trends</li> <li>• Relatively high costs of product development and production</li> <li>• Inefficient ports, trade facilitation and logistics</li> <li>• Relatively high costs of energy</li> <li>• Some outdated business practices and methods</li> <li>• Limited capacity of producer organisations and cooperatives (financial and service capability)</li> </ul>
<b><i>Opportunities</i></b>	<b><i>Threats</i></b>
<ul style="list-style-type: none"> <li>• Improved use of technology, including digitalization, agritech, Ecommerce, Manufacturing 4.0, Energy 4.0, etc,</li> <li>• Increased use of provisions within trade agreements</li> <li>• Cross-border partnerships for supply of inputs and technology</li> <li>• Clustering and collaboration</li> <li>• Develop market-based strategic alliances for co-labelling, co-packing and distribution</li> <li>• Development of renewable energy</li> <li>• Greening of industry</li> <li>• Linkages with the Blue Economy</li> <li>• Improved linkages with tourism and government procurement (local and regional)</li> <li>• Strategic use of intellectual property, including improved use of branding, including national and collective branding</li> </ul>	<ul style="list-style-type: none"> <li>• Changes to macroeconomic stability (including regional and global stability)</li> <li>• Climate change and a lack of resilience</li> <li>• Vulnerability to natural disasters, pests and diseases</li> <li>• Technological shifts</li> <li>• Shifts in government policy</li> <li>• Biohazards</li> <li>• Insufficient access to finance at the macro level to channel towards productive enterprise</li> <li>• Persistent low economic growth</li> <li>• Lack of necessary infrastructure and logistics to facilitate efficient exportation</li> </ul>



## **5. Export Competitiveness Roadmap Strategic Action Plan**

### **i. Objectives**

The objective of the Export Competitiveness RoadMap is to detail new approaches to increased export competitiveness and the **right branding strategies for effective implementation.**

### **ii. Key Pillars of Strategy and Rationale for their inclusion**

Figure 10 below indicates the key pillars proposed for the strategy and the rationale for their inclusion.

### **iii. Action Plan proposals**

Figure 11 below shows the action plan objectives for new approaches to increased export competitiveness and the right branding strategies for effective implementation. Further details of strategic action plan proposals are highlighted below. The action plans are based on the research outlined in this report and the feedback from consultations to date. They address the limitations highlighted previously in the SWOT Analysis.

#### **Strategic Pillar 1 New Product and Services Development**

*Objective: To diversify the number of commercially successful export products and services available for export*

##### **Action Plan**

- 1) Encourage product diversification and clustering, especially among MSMEs by developing incubator services to support the research and development of export ready product through shared equipment and design services
- 2) Create a focal point for design development and provide support to MSMEs in export packaging and labelling through a Design Service Centre
- 3) Encourage export expansion through private labelling, copacking and co-labelling as a means to greater integration in global value chains
- 4) Develop an understanding of the circular economy and encourage the greening of business and the development of new products from waste and recyclable materials
- 5) Encourage innovation through challenge competitions
- 6) Capacity building in the area of new product development, innovation and commercialisation of local products with a view to export

Figure 10 (below)

# Export Competitiveness Roadmap Pillars & Rationale

The objective of the Export Competitiveness RoadMap is to detail new approaches to increased export competitiveness and the right branding strategies for effective implementation.

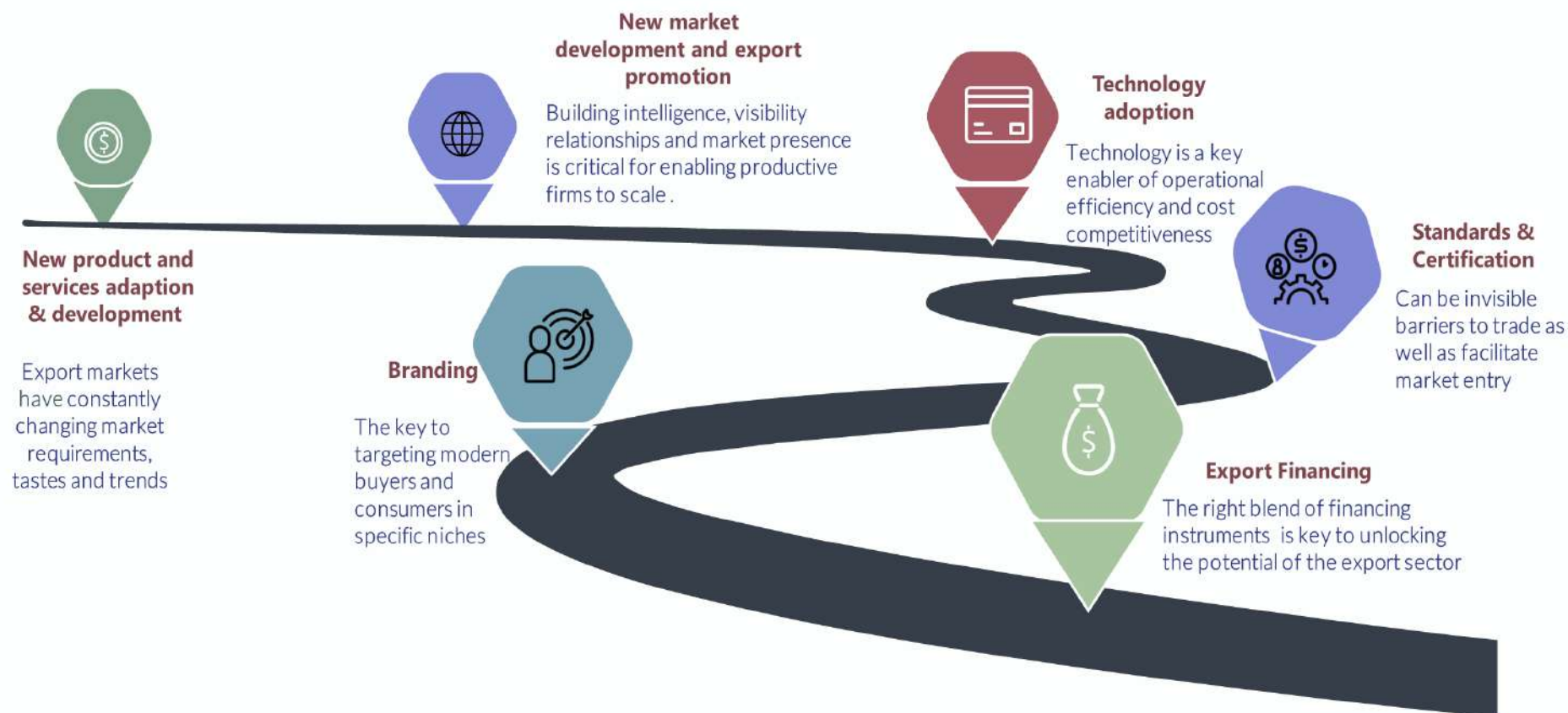


Figure 11 (below)



## Export Competitiveness RoadMap

### Objectives

## **Strategic Pillar 2 New market development and export promotion**

*Objective: To build market intelligence, visibility, relationships and market presence with a view to increasing exports and export potential*

### **Action Plan**

- 1) Develop a buy local campaign to promote Belizean products and services to locals and visitors. This will include the development of local events to showcase culinary traditions and local products in a cultural context
- 2) Create a linkage programme to support increased trade between agriculture, manufacturing, tourism (including cruise tourism) and government procurement nationally and across CARICOM
- 3) Develop at least one annual gastronomy event to showcase the local food industry in partnership with tourism marketing and the Belizean Diaspora
- 4) Conduct capacity building in the area of export readiness, marketing and export promotion
- 5) Develop a virtual platform, which will function as a (permanent) virtual trade centre to promote Belizean exporters/ potential exporters and their products and services
- 6) Undertake targeted trade missions and export promotion activities to markets with identified potential
- 7) Enhance the existing virtual platform for transparent sharing of trade opportunities
- 8) Encourage the use of local culture, creative services (music, fashion, design) and heritage in the promotion of local products

## **Strategic Pillar 3 Technology Adoption**

*Objective: To enable operational efficiency and cost competitiveness in export companies and potential exports through the use of technology*

### **Action Plan**

- 1) Support capacity building in relation to IT-enabled processes, agritech, digitalization development and digital marketing, as well as other technologies
- 2) Encourage research partnerships to drive innovation and innovation to develop local-specific technologies
- 3) Implement technological solutions to expand the coordination of transportation, logistics and distribution in order to reduce transaction costs
- 4) Encourage the use of renewable energy to minimize energy costs.

## **Strategic Pillar 4 Standards and Certification**

*Objective: To Increase internationalization of locally owned companies through standards and certification*

### **Action Plan**

- 1) Develop a programme of capacity building and financing support for export-ready companies to gain certification in organic standards, food safety, voluntary and sustainability standards
- 2) Develop a pool of locally based service providers with expertise in standards and certification

## **Strategic Pillar 5 Branding**

*Objective: To implement a modern branding campaign targeting modern buyers and consumers in specific niches to increase visibility of exporters and potential exporters and increase export sales*

### **Action Plan**

- 1) Develop a programme of capacity building and financing support for export-ready companies to upgrade branding and protect local brands as intellectual property in global marketplaces
- 2) Develop a pool of locally based service providers with expertise in branding
- 3) Explore the possibility of using a “Uniquely Belizean” collective brand to certify local production
- 4) Explore the potential for registration of geographic indications for certain Belizean made products.

## **Strategic Pillar 6 Export Financing**

*Objective: To provide the right blend of financing instruments on a consistent basis to unlock the potential of the export sector*

### **Action Plan**

- 1) Create a programme of voluntary exporter registration, tied to the provision of incentives including duty-free importation of inputs for productive enterprises, new product development, research, mobility and market investigation grants for established exporters (in operation for more than three years).
- 2) Create a programme of dedicated, preferential, export financing and support local exporters in accessing same
- 3) Provide grant funding to support new product and service development, testing, innovation, technology adoption and integration, business upgrading and export market promotion
- 4) Establish an access to finance programme to guide export ready enterprises on appropriate mix of financing and assist them in accessing export guarantees, pre-shipment financing and single digit interest rates on viable service terms.

### **iv. Timeline for activities**

Table 9 below shows the proposed time frame for implementation over the next five years.

**Table 9: Implementation Plan**

	Y1	Y2	Y3	Y4	Y5
<b>Strategic Pillar 1 New Product and Services Development</b>					
<i>Objective: To diversify the number of commercially successful export products and services available for export</i>					
7) Encourage product diversification and clustering, especially among MSMEs by developing incubator services to support the research and development of export ready product through shared equipment and design services					
8) Create a focal point for design development and provide support to MSMEs in export packaging and labelling through a Design Service Centre					
9) Encourage export expansion through private labelling, copacking and co-labelling as a means to greater integration in global value chains					
10) Develop an understanding of the circular economy and encourage the greening of business and the development of new products from waste and recyclable materials					
11) Encourage innovation through challenge competitions					
12) Capacity building in the area of new product development, innovation and commercialisation of local products with a view to export					
<b>Strategic Pillar 2 New market development and export promotion</b>					
<i>Objective: To build market intelligence, visibility, relationships and market presence with a view to increasing exports and export potential</i>					
9) Develop a buy local campaign to promote Belizean products and services to locals and visitors. This will include the development of local events to showcase culinary traditions and local products in a cultural context					
10) Create a linkage programme to support increased trade between agriculture, manufacturing, tourism (including cruise tourism) and government procurement nationally and across CARICOM					
11) Develop at least one annual gastronomy event to showcase the local food industry in partnership with tourism marketing and the Belizean Diaspora					
12) Conduct capacity building in the area of export readiness, marketing and export promotion					
13) Develop a virtual platform, which will function as a (permanent) virtual trade centre to promote Belizean exporters/potential exporters and their products and services					
14) Undertake targeted trade missions and export promotion activities to markets with identified potential					
15) Enhance the existing virtual platform for transparent sharing of trade opportunities					
16) Encourage the use of local culture, creative services (music, fashion, design) and heritage in the promotion of local products					

<b>Strategic Pillar 3 Technology Adoption</b>					
<i>Objective: To enable operational efficiency and cost competitiveness in export companies and potential exports through the use of technology</i>					
5) Support capacity building in relation to IT-enabled processes, agritech, digitalization development and digital marketing, as well as other technologies					
6) Encourage research partnerships to drive innovation and innovation to develop local-specific technologies					
7) Implement technological solutions to expand the coordination of transportation, logistics and distribution in order to reduce transaction costs					
8) Encourage the use of renewable energy to minimize energy costs.					
<b>Strategic Pillar 4 Standards and Certification</b>					
<i>Objective: To Increase internationalization of locally owned companies through standards and certification</i>					
3) Develop a programme of capacity building and financing support for export-ready companies to gain certification in organic standards, food safety, voluntary and sustainability standards					
4) Develop a pool of locally based service providers with expertise in standards and certification					
<b>Strategic Pillar 5 Branding</b>					
<i>Objective: To implement a modern branding campaign targeting modern buyers and consumers in specific niches to increase visibility of exporters and potential exporters and increase export sales</i>					
5) Develop a programme of capacity building and financing support for export-ready companies to upgrade branding and protect local brands as intellectual property in global marketplaces					
6) Develop a pool of locally based service providers with expertise in branding					
7) Explore the possibility of using a “Uniquely Belizean” collective brand to certify local production					
8) Explore the potential for registration of geographic indications for certain Belizean made products.					
<b>Strategic Pillar 6 Export Financing</b>					
<i>Objective: To provide the right blend of financing instruments on a consistent basis to unlock the potential of the export sector</i>					
5) Create a programme of voluntary exporter registration, tied to the provision of incentives including duty-free importation of inputs for productive enterprises, new product development, research, mobility and market investigation grants for established exporters (in operation for more than three years).					
6) Create a programme of dedicated, preferential, export financing and support local exporters in accessing same					
7) Provide grant funding to support new product and service development, testing, innovation, technology adoption and integration, business upgrading and export market promotion					
8) Establish an access to finance programme to guide export ready enterprises on appropriate mix of financing and assist them in accessing export guarantees, pre-shipment financing and single-digit interest rates on viable service terms.					



**v. *Implementing Mechanism and Monitoring and Evaluation Framework***

Critical success factors in the RoadMap implementation include stakeholder engagement and ownership and the management of implementation by a high-level Export Development Council. At present, it is logical that the Export Council be formed as a possible sub-set of the Economic Development Council, perhaps co-opting additional membership from key private sector companies and their associations, as well as strategic trade support institutions such as the Bureau of Standards Belize and the national Customs Administration. No dedicated and consistent financing resources for export development were detected at the time of writing. As such, a major part of the terms of reference of the Export Council would be to urgently address the need for such financing to enable growth of the export sector.

Stakeholder engagement should be ongoing, with periodic (perhaps quarterly) updates on progress as well as monitoring and evaluation of the proposed strategies to ensure that they remain relevant and are adjusted to accommodate local needs and conditions.

Table 10 below shows an initial monitoring and evaluation framework for the Export Competitiveness RoadMap. This should be reviewed and adjusted on an annual basis, according to changes occurring on the local level.



**Table 10 (below) Monitoring and Evaluation Framework**

Initiatives & Tasks	Time Frame (months)																		Inputs	Outputs	Key Performance Indicators (Targets)
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18			
Strategic Pillar 1 New Product and Services Development																					
Objective: To diversify the number of commercially successful export products and services available for export																					
1.1 Encourage product diversification and clustering, especially among MSMEs by developing incubator services to support the research and development of export ready product through shared equipment and design services																			Centralized location for incubator, design and costing of shared services and equipment, development of services offer in consultation with MSMEs, specialized equipment, technical staff, incubator operational costs	Increased number of MSME products meeting packaging and labelling standards, increased production volumes, expanded export readiness	At least 15 new products ready for export market entry in year 1; at least 20 MSMEs are clients of the incubator by the end of year 1; At least 15 new products have packaging and labelling ready for export market entry in year 1; at least 20 MSMEs are clients of the Design Services Centre by the end of year 1; at least 10% of clients are youth businesses: at least 50% of clients are businesses with women ownership
1.2 Create a focal point for design development and provide support to MSMEs in export packaging and labelling through a Design Service Centre																			Graphic designer(s), development and costing of design services, packaging and labelling materials		
1.3 Encourage export expansion through private labelling, copacking and co-labelling as a means to greater integration in global value chains																			Trade missions for local medium-sized and certified manufacturing plants to high volume export markets	Increase in export revenues from investment partnerships	US\$250000 in export sales by the end of year 1
1.4 Develop an understanding of the circular economy and encourage the greening of business and the development of new products from waste and recyclable materials																			Capacity building workshops on greening of business, renewable energy implementation and the circular economy; consultant's fees	Reduced cost of doing business and increased relevance to export market development	At least one workshop completed in each area by the end of year one; at least 10% of attendees are youth businesses: at least 50% of attendees are businesses with women ownership
1.5 Encourage innovation through challenge competitions																			Annual innovation competitions & showcase : venue cost, prizes for top 3, staff time for coordination	Increase in awareness of innovation and potential results from adoption; increased visibility of Belize as an innovation-driven economy	One innovation competition, awareness building workshop and showcase completed by the end of year 1;at least 10% of attendees are youth businesses: at least 50% of attendees are businesses with women ownership
1.6 Capacity building in the area of new product development, innovation and commercialisation of local products with a view to export																			Capacity building webinars and workshops	Expanded awareness and competitiveness	At least three (3) workshops on related subject matter completed each year; at least 10% of attendees are youth businesses: at least 50% are businesses with women ownership

Strategic Pillar 2 New market development and export promotion																				
Objective: To build market intelligence, visibility, relationships and market presence with a view to increasing exports and export potential																				
2.1 Develop a buy local campaign to promote Belizean products and services to locals and visitors; including local events to showcase culinary traditions and local products in a cultural context																		Venue and event costs, music & entertainment service providers. Local chef consultants, catering costs, marketing & promotion costs	Visibility for <i>Unique Belize Export</i> brand, soft launch and market testing	At least one (1) Unique Belize Export branded event per quarter
2.2 Create a linkage programme to support increased trade between agriculture, manufacturing, tourism (including cruise tourism) and government procurement nationally and across CARICOM																		Staff costs, travel costs, marketing consultants	Visibility for Unique Belize Export brand, increased export sales	US\$500000 in export sales by the end of year 1
2.3 Develop at least one annual gastronomy event to showcase the local food industry in partnership with tourism marketing and the Belizean Diaspora																		Venue and event costs, music & entertainment service providers. Local and foreign chef consultants, travel and accommodation for international food writers, catering costs, marketing & promotion costs	Visibility for Unique Belize Export brand, stimulation of increased export demand and sales	At least one (1) Unique Belize Export branded event per annum by month 18; content for future marketing
2.4 Conduct capacity building in the area of export readiness, marketing and export promotion																		Capacity building workshops on export development; consultant's fees	Increased understanding of export and capacity for market penetration	At least one (1) workshop on related subject matter per quarter; at least 10% of attendees are youth businesses: at least 50% are businesses with women ownership
2.5 Develop a virtual platform, which will function as a (permanent) virtual trade centre to promote Belizean exporters/ potential exporters and their products and services																		Information technology/ web development consultants	Buyer- centric portal for brand and participants' visibility	Virtual portal operational by month 13
2.6 Undertake targeted trade missions and export promotion activities to markets with identified potential																		booth costs, travel and accomodation, in-market consultants	Visibility for Unique Belize Export brand, stimulation of increased export demand and sales	At least two (2) major missions per year
2.7 Enhance the existing virtual platform for transparent sharing of trade opportunities																		staff costs		Virtual portal operational by month 6
2.8 Encourage the use of local culture, creative services (music, fashion, design) and heritage in the promotion of local products																		staff costs, fees for creative services	Distinctive product offerings and increased competitiveness	At least three (3) new products are launched each year with cultural / heritage influences incorporated

Strategic Pillar 3 Technology Adaption																				
Objective: To enable operational efficiency and cost competitiveness in export companies and potential exports through the use of technology																				
3.1 Support capacity building in relation to IT-enabled processes, agritech, digitalization development and digital marketing, as well as other technologies																		Capacity building webinars and workshops	Expanded awareness and competitiveness	At least two (2) workshops on related subject matter completed each year; at least 10% of attendees are youth businesses: at least 50% are businesses with women ownership
3.2 Encourage research partnerships to drive innovation and innovation to develop local-specific technologies																		MOUs to drive research and innovation programmes bwteen agencies		At least one (1) MOU signed each year
3.3 Implement technological solutions to expand the coordination of transportation, logistics and distribution in order to reduce transaction costs																		Sub-Committee of Export Development Council	Reduction in reported transaction costs and improved trade facilitation	Improvement in turnaround times for export cargo
3.4 Encourage the use of renewable energy to minimize energy costs.																		Sub-Committee of Export Development Council, grants/ incentives for renewable energy investments	Reduction in energy costs and increased cost competitiveness	Number of companies making renewable energy investments
Strategic Pillar 4 Standards and Certification																				
Objective: To Increase internationalization of locally owned companies through standards and certification																				
4.1 Develop a programme of capacity building and financing support for export-ready companies to gain certification in organic standards, food safety, voluntary and sustainability standards																		Sub-Committee of Export Development Council, grants/ incentives for certification process	Export market access	Number of companies achieving certification through the programme
4.2 Develop a pool of locally based service providers with expertise in standards and certification																		Training of trainers programme in partnership with Belize Bureau of Standards	Reduced operational costs and increased competitiveness for exporters	Number of trainers qualified to undertake quality management audits
Strategic Pillar 5 Branding																				
Objective: To implement a modern branding campaign targeting modern buyers and consumers in specific niches to increase visibility of exporters and potential exporters and increase export sales																				
5.1 Develop a programme of capacity building and financing support for export-ready companies to upgrade branding and protect local brands as intellectual property in global marketplaces																		Unique Belize Export Brand Campaign, umbrella brand, participation agreement, consultants, financing support	Visibility for exports and increased sales, including loyalty sales.	10% increase in revenues for each participating company by the end of year 1
5.2 Develop a pool of locally based service providers with expertise in branding																				
5.3 "Unique Belize Export" collective brand to certify local production																				
5.4 Explore the potential for registration of geographic indications for certain Belizean made products.																		Awareness building among associations in partnership with BELICO	Premium pricing for export sales	at least one (1) GI registration underway by year 3

Strategic Pillar 6 Export Financing																
Objective: To provide the right blend of financing instruments on a consistent basis to unlock the potential of the export sector																
6.1 Create a programme of voluntary exporter registration, tied to the provision of incentives including duty-free importation of inputs for productive enterprises, new product development, research, mobility and market investigation grants for established exporters (in operation for more than three years).																
6.2 Create a programme of dedicated, preferential, export financing and support local exporters in accessing same																
6.3 Provide grant funding to support new product and service development, testing, innovation, technology adoption and integration, business upgrading and export market promotion																
6.4 Establish an access to finance programme to guide export ready enterprises on appropriate mix of financing and assist them in accessing export guarantees, pre-shipment financing and single digit interest rates on viable service terms.																
										Sub-Committee of Export Development Council, including Ministry of Finance, Customs Administration, Statistical Institute of Belize, staff costs, database development costs		Channelling of government financial support to bonafide exporters; increased export revenues (foreign currency earnings) and local employment		Number of exporters and potential exporters opting for exporter registration; percentage of women and youth owned enterprises registering as exporters		
														Increase in export sales as a result of access to finance; percentage of women and youth owned enterprises accessing finance		
														Number of export-oriented projects financed; value of projects financed; projected increase in export sales; percentage of women and youth owned enterprises registering as exporters		

# **APPENDICES**

## **APPENDIX 1 LIST OF INDIVIDUALS AND ORGANISATIONS CONTRIBUTING TO THE PREPARATION OF THIS ROADMAP**

### **Public Sector**

Economic Development Council, Office of the Prime Minister'  
Directorate General for Foreign Trade  
Belize Bureau of Standards  
Belize Marketing and Development Corporation  
Central Bank of Belize  
Customs and Excise Department  
Ministry of Agriculture and Enterprises

### **Private Sector**

3 R Farms  
4 Hands Shrimp Farm Limited  
Aqua Mar Belize  
ASR-BSI  
Aunt Sadies  
Banana Bank Agco Limited  
BAS Group  
BCCI  
BCSP  
BEL-CAR  
Belize Chocolate Company  
Belize Rainforest Foods  
Belize Spice Farms  
Belize Virtual Center  
BHA  
Big H  
BTIA  
Carabeef  
Caribbean Chicken  
Caribbean International Brewery Co. Ltd  
Caribbean Paper Company Ltd  
Caribbean Premiere Products Ltd  
Caribbean Shrimp Ltd  
Caye Talkers Limited  
Cayo Grains & Agro Supply Limited  
Che'il Mayan Chocolate  
Chemical Specialties of Belize  
Chris Ramirez  
Circle R Products Ltd.  
Citrus Products of Belize  
Clear Call Belize

Copal Tree Distiller Ltd  
Corridgeree Belize  
Country Meat Products  
Cuello's Distillery Ltd.  
Fein Catch Ltd  
Femagra Industries Ltd.  
Finca Chocolat  
Fuzed Bistro Ltd.  
Gallon Jug  
Green Care Products Limited  
Haney Farms Ltd.  
Hidden Acre Ranch  
IMEX BZ LLC  
Little Belize Exporters  
Mahogany Chocolate  
Mama Belize  
Marie Sharp's Fine Food Limited  
Maya Mountain Cacao Ltd.  
Medina's Furniture  
MIAB/Belize Music Agency  
Naleedo Belize  
Northern Fisherman Coooperative Ltd.  
Obregon Coconut Compnay  
Pine Lumber Company Limited  
Protel BPO  
Quality Poultry Products  
Reimers Feed Mill  
Royal Mayan Shrimp Farm  
Running W Brand Meats  
Santander Group  
Silk Grass Farms  
Tex Bel Farms/Lime Co  
Texmar Shrimp Farm  
The Office Guru  
TKO Farms  
Toledo Cacao Growers Association  
Transparent BPO  
Travellers Liquors Ltd.  
Tropical Aquaculture Investment Ltd.  
Voyse International  
Wes-Bel Produce  
Western Dairies Ltd  
Yaaxkin Butterfly Farm



## APPENDIX 2 RESULTS OF STAKEHOLDER CONSULTATIONS ON SUPPLY SIDE CONSTRAINTS

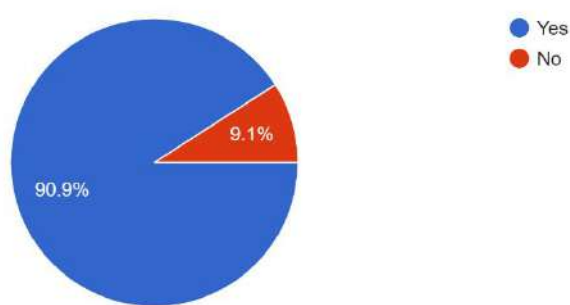
As shown in Figure 1 below, most respondent firms were exporters (90.9%).

A wide range of mainly agrifood products was produced by respondents, but also biotechnology-based fertilizers, animal nutrition and cleaning agents as well as cement packaging sacks (Box 1). A similar range of products, with some diversification towards value added processing, is anticipated for future export marketing (Box 2).

**Figure 1 (below): Respondents that were exporting at the time of survey**

Are you currently exporting?

11 responses



### **Box 1: What products does your company currently make? (11 responses)**

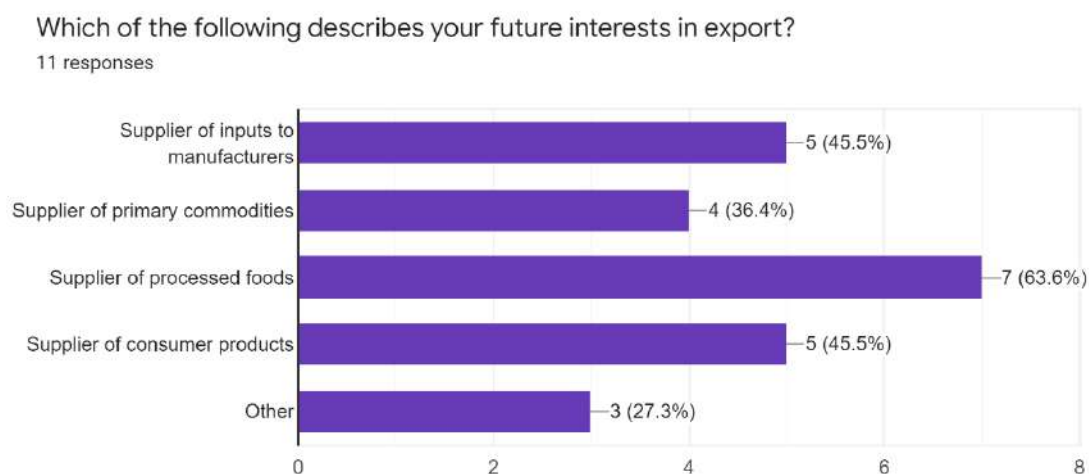
1. We process, package and export Red Kidney Beans, Blackeye Peas, Corn, and Corn meal.
2. Rum
3. Cement Sacks: General Use (4,060psi), 42.5kgs Structural (5,800psi), 42.5kgs Ari (6,500psi), 42.5kgs.
4. Habanero pepper sauces (different heat levels), Gourmet pepper sauces, tropical fruit jellies, naturally flavoured nectars, pepper mash
5. Orange, grapefruit, pineapple concentrated juice, by-products (oils, essences, pulp cells), value add products (citrus feed, tetra pak juice and juice mixers in variety of flavors), Soursop puree
6. Cotton but currently in development phase of other agriculture projects
7. Biofertilizers, Soil Microbial Innoculant, Animal Probiotics, Microbial Environmental Solutions, Household Cleaning Products
8. Frozen Shrimp, Shrimp Post Larvae
9. Truly Turmeric paste- Original and with Black Pepper Turmeric Powder Turmeric Beverages
10. Entertainment
11. Cocoa beans

**Box 2: What products would you like to be exporting in the next five years? (11 responses)**

1. Would like to go into ready-cooked beans and chips
2. Rum
3. General Use (4,060psi) Cement sacks 42.5kgs Structural (5,800psi) Cement sacks 42.5kgs Ari (6,500psi) Cement sacks 42.5kgs.
4. Gourmet pepper sauces, habanero pepper sauces, tropical fruit jellies, naturally flavoured nectars
5. Coconut water, all the by-products (oil, powder, milk, etc)
6. Cohune Oil, Hemp Oil, Tropical Fruit processed products
7. Biofertilizers, Soil Microbial Innoculant, Animal Probiotics, Microbial Environmental Solutions, Household Cleaning Products
8. Value-added shrimp
9. Turmeric paste, Teas, Turmeric powder, Beauty line
10. More International Tours, Increase the song play on digital platforms worldwide, and Sale of tourism entertainment packages. Expand of videos program to PPV and VOD
11. Cocoa beans, vanilla beans, chocolate

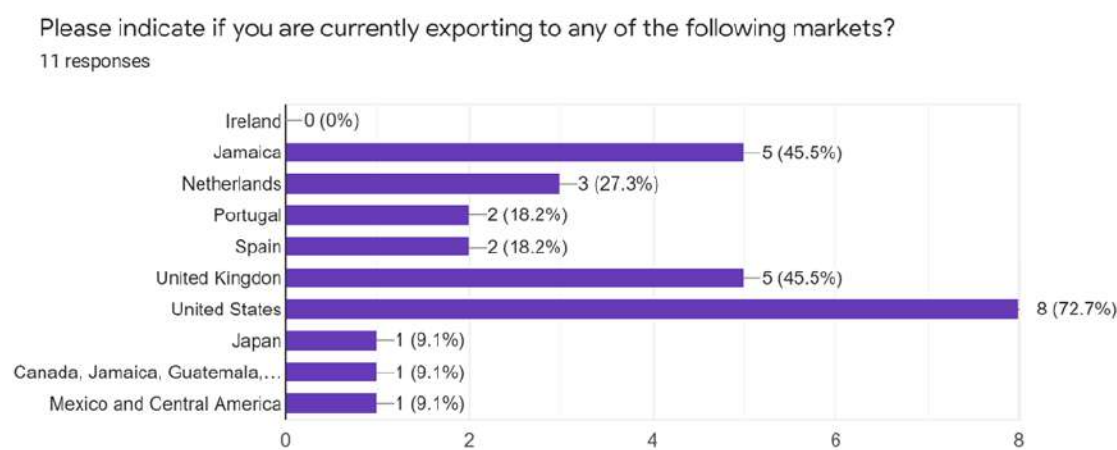
Figure 2 below illustrates that there is significant future interest in processed food value chains (63.6%) , consumer products (45.5%), supply of inputs to manufacturers (45.5%) and supply of primary commodities (36.4%). Tapping into these export niches requires different export strategies. Supply of inputs to manufacturers and exportation of primary commodities require a robust trade promotion programme of trade missions and business-to-business matchmaking, while processed foods and consumer goods require digital marketing, ecommerce and specialty trade shows.

**Figure 2 (below): Value chains of future interest**



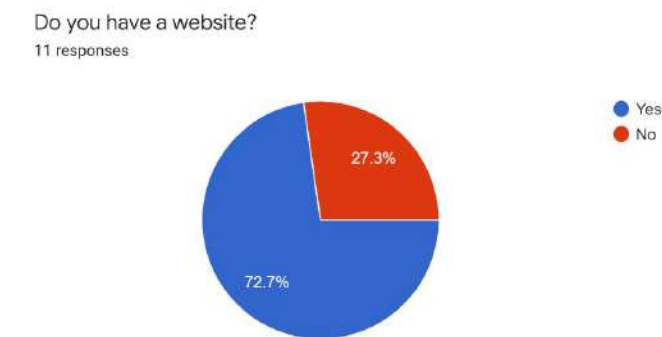
Traditional markets of the United States (72.7%) and United Kingdom (45.5%) and Jamaica (45.5%) are the most significant current export markets (Figure 3). The Netherlands, Portugal and Spain were also important. In the next five years, companies projected that the United States will also remain an important market, along with CARICOM, Central and South America. Some interest was also expressed in non-traditional markets as far away as Switzerland, Africa and the United Arab Emirates (UAE).

**Figure 3 (below): Current Export Markets**



A significant number of supply-side constraints in scaling production were attributed to trade facilitation challenges. Other issues were cited with consistent and reliable supplies of raw materials, challenges with attracting staff and recruiting labour and operational issues, including high production costs in the context of limited access to finance. The full listing of challenges stated is shown in Box 3 below. With reference to specific challenges related to export, access to appropriate finance was the cause of the largest number of issues cited, as indicated in Box 4 below. Less than a third of respondents had websites as shown in Figure 4 below, and this could be considered as one measure of export readiness.

**Figure 4 (below): Export Readiness**



***Box 3: Please explain the top 3 constraints currently faced in increasing your production (11 responses)***

***Trade Facilitation***

- Our exports are strongly dependant on local raw agricultural production. Therefore, any erratic weather conditions or pest infestations on farms directly affects our export
- Ports are a problem. No bulk facility at port for grains.
- Containerized cargo has been difficult due to stevedore strikes etc.
- It is hard to be competitive in the international arena given the subsidies enjoyed by producers in large countries like the USA
- Getting raw materials on time
- Duties, customs, banking, office hours, environmental fees
- Logistics facilities capabilities in the country (ports and land borders)

***Operational***

- Raw materials available in the country
- Technical people available in the country
- Not having sufficient trained staff
- Packaging supplies: filling and or packaging is a challenge (slow)
- Raw material supply due to declining production of citrus groves, but replanting has already commenced; Reliable supply of workers to harvest the crop annually, primarily migrant workers
- Cost of Production – reliability and cost of energy, cost of fuel
- Costs to get certifications and develop standards
- Lack of farmer knowledge to develop organic foods
- High cost of inputs to increase production

***Finance***

- Indebted with high interest loan, non-existent access to low interest loans
- Access to capital for new technology implementation
- Machinery- increase efficiency and safety
- Solar power to reduce costs; Inputs- bottles and labels
- Access to finance, access to farm labour, government red tape

***Marketing***

- Appropriate market knowledge/intelligence and access
- Funding, Marketing, and a comprehensive export plan and programs for the exporting for the Creative Sector and service on a whole

**Box 4: What constraints have you experienced in export? (10 responses)**

**Trade Facilitation**

- Unreliable shipping lines – arriving in Belize and delivering products to destination
- Shortage of containers
- Challenges with BAHA, Shipping routes, markets
- Limited industry linkage of export service connection through international trade

**Operational**

- Compliance with standards like HACCP, FDA etc
- We still don't have any export process
- Lack of certifications
- access to packaging materials

**Marketing**

- Market information awareness or market research access for country to which goods are to be exported

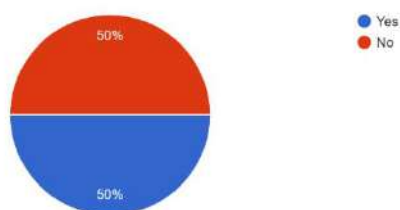
**Finance**

- All extra fees, banking fees, guard fee, plastic fee, airport only accepts goods at certain times
- Increased cost of ocean freight
- high cost for movement of goods and long transport time for accessing CARICOM
- Tariffs
- Funding for operational expansion to the export market. Lack of Government and private support programs to access the export market
- High port costs, unable to easily work out export costs – just get a bill afterwards,

Despite the limited number of company websites, fifty percent (50%) of respondents showed interest in technology adoption, as indicated by their experiences with agritech as digitalization captured in Figure 5 below. There was also a keen interest in certification and standards, including HACCP, ISO, Organic, US food safety, among others.

**Figure 5 (below): Technology Adaption**

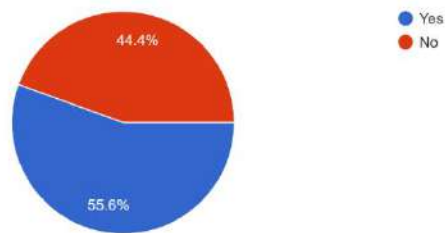
Do you have any experience with agritech or digitalization?  
10 responses



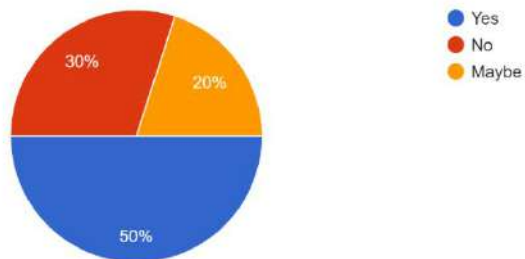
The management of intellectual property among respondents showed mixed responses. Just less than fifty-six percent (56%) had registered their trademarks/ brands as intellectual property. About fifty percent (50%) of respondents were interested in a collective branding concept with other producers and eighty-seven and a half percent (87.5%) were in favour of a national branding concept as shown in Figure 6 below.

**Figure 6 (below): Intellectual Property**

Is your product/ brand registered as intellectual property?  
9 responses



Would you be interested in a collective brand with other producers?  
10 responses



Do you think Belize products should be promoted under a national brand?  
8 responses

