

Contents

List of Figures	ix
List of Tables	xi
Acknowledgements	xiii
Abbreviations	xv
Introduction	1
<i>Indera Sagewan-Alli</i>	
SECTION 1. MANUFACTURING INDUSTRY CASE STUDIES	
Case Study 1. A St Lucian Experience for Sustainable Participation in the Agro-Foods Global Value Chain: The Case of Baron Foods Limited	17
<i>Vimlawatti St Hill and Jacintha Lee</i>	
1.1 Introduction	17
1.2 The Global Condiment, Sauces, Dressings and Seasonings Market	19
1.3 Baron Foods' Participation in the Condiments and Sauces Global Value Chain	21
1.4 Key Elements Driving Baron Foods' Export Success	21
1.5 Local Industry Conditions: Challenges for Other Firms	25
1.6 Lessons Learned	29
1.7 Policy Recommendations for Sector Development	29

Case Study 2. A Structural Analysis of the Competitiveness of the Hot Pepper Sauce Industry in Trinidad and Tobago: A Global Value Chain Approach	39
<i>Shellyanne Wilson</i>	
2.1 Introduction	40
2.2 The Hot Pepper Sauce Global Value Chain	40
2.3 Hot Pepper Production	41
2.4 Hot Pepper Paste/Mash Production	42
2.5 Hot Pepper Sauce Production	42
2.6 Overview of the Hot Pepper Sauce Industry in Trinidad and Tobago	44
2.7 Actors in Trinidad and Tobago's Value Chain	44
2.8 Local Industry Conditions	50
2.9 Firm Strategy, Structure and Rivalry	51
2.10 Related and Supporting Institutions	51
2.11 Lessons Learned	52
2.12 Upgrading Strategies for the Local Hot Pepper Sauce Industry	53
2.13 Recommendations	55
2.14 Conclusion	56
Case Study 3. The Rum Industry of Guyana in the Global Value Chain	61
<i>Dianna DaSilva-Glasgow and Louis Dodson</i>	
3.1 Introduction	61
3.2 Input-Output Structure of the Rum Global Value Chain	62
3.3 Rum Production	64
3.4 Blending	65
3.5 Bottling	65
3.6 Distribution	65
3.7 Global Supply and Demand for Rum	66
3.8 Market Segments	71
3.9 Global Trends	71
3.10 Assessing Guyana's Participation in the Rum Global Value Chain	74
3.11 Production and Export Trends	76

3.12 Analysis of Factors Affecting Guyana’s Competitiveness	78
3.13 Role of Key Stakeholders in Guyana’s Rum Industry	81
3.14 Upgrading Strategies and Tactics	81
3.15 SWOT Analysis of Guyana’s Rum Industry	85
3.16 Lessons Learned	86
3.17 Recommendations for Further Upgrading	87
3.18 Policy Recommendation	88
3.19 Conclusion	89
Case Study 4. VincyFresh Limited: A Caribbean Case Study on Export Competitiveness and Global Value Chain Analysis	93
<i>Heidi E. Vincent and Simone N. Murray</i>	
4.1 Introduction	93
4.2 The Global Fruit and Vegetable Processing Industry	94
4.3 VincyFresh in the Fruit and Vegetable Global Value Chain	99
4.4 The Fruit and Vegetable Processing Industry in St Vincent and the Grenadines	101
4.5 Factors Affecting St Vincent and the Grenadines’ Competitiveness in the Food-Processing Sector	105
4.6 Lessons Learned	112
4.7 Upgrading Recommendations for VincyFresh	113
 SECTION 2. SERVICES INDUSTRY CASE STUDIES	
Case Study 5. The Chaguaramas Ship Repair Cluster: Sustaining Competitiveness and Lessons for Upgrading along the Maritime Value Chain	127
<i>Don Charles, Debbie A. Mohammed and Preeya Mohan</i>	
5.1 Introduction	128
5.2 Overview of the Chaguaramas Cluster	128
5.3 The Global Ship Repair Industry	130
5.4 The Regional Ship Repair Industry	131
5.5 The Ship Repair Global Value Chain	132

VIII Contents

5.6	Local Competitiveness Factors	135
5.7	Lessons Learned	140
5.8	Upgrading Strategies	141
5.9	Recommendations	143
5.10	Conclusion	147
 Case Study 6. The Future of Solar Water Heaters in Barbados: Market Expansion or Product Innovation?		151
<i>Andrea N. Baldwin and Olivia Chase-Smith</i>		
6.1	Introduction	152
6.2	The Solar Water Heating System and the Global Value Chain	153
6.3	Solar Water Heaters: A Global Perspective	153
6.4	Overview of the Local Solar Water Heating Industry in Barbados	157
6.5	Support for the Solar Water Heating Industry	160
6.6	Local Industry Conditions	161
6.7	Factor Conditions	163
6.8	Firm Strategies	164
6.9	Lessons Learned	164
6.10	Recommended Strategies	166