



# Market Profile For Cucumber In Trinidad And Tobago



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## **TABLE OF CONTENTS**

<b>1.0: Why a Market Profile</b>	<b>3</b>
<b>2.0: Introduction</b>	<b>3</b>
<b>3.0: Production</b>	<b>3</b>
<b>4.0: Market Structure</b>	<b>4</b>
<b>5.0: Markets</b> <b>5.1: Wholesale Market Volumes</b> <b>5.2: Wholesale Prices</b> <b>5.3: Retail Prices</b>	<b>5</b>
<b>6.0: Purchases by Type of Outlets</b>	<b>7</b>
<b>7.0: Exports</b>	<b>9</b>
<b>8.0: Market Access</b> <b>8.1: Local Market</b> <b>8.2: Export Markets</b> <b>8.2.1: CARICOM</b> <b>8.2.2: Other Countries</b>	<b>9</b>
<b>9.0: Outlook for PA grown Cucumbers</b>	<b>10</b>
<b>10.0: Bibliography consulted</b>	<b>10</b>

## 1.0 Why a Market Profile

To provide information on the market and trends for farmers, producer groups, traders, trainers, government agencies, financial institutions, associations and other stakeholders involved in Protected Agriculture.

This Market Profile was developed from secondary data sourced from the Central Statistical Office, the National Agricultural Marketing and Development Corporation (NAMDEVCO), the National Agricultural Marketing Information System (NAMIS), the Caribbean Agricultural Research and Development Institute (CARDI) and the European Union Common Fund for Commodities (CFC) Protected Agriculture Project Market Study 2011 and the UN International Trade Centre.

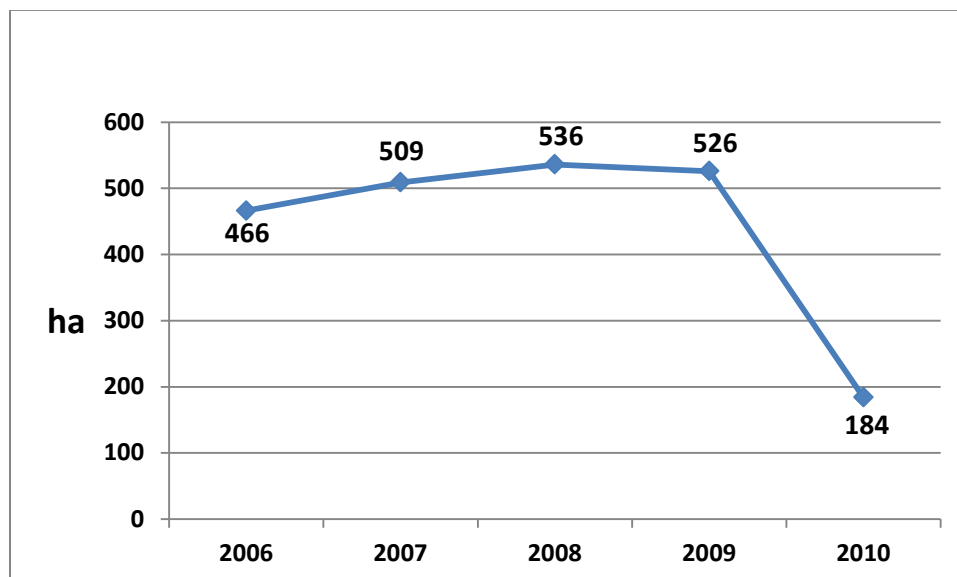
## 2.0 Introduction

Cucumber (*Cucumis sativus*) is one of the major crops grown in Trinidad and Tobago. It is grown throughout the country; however production is more concentrated in the Wallerfield and Sangre Grande in the east and Moruga in the south of the country. The average farm size is about 0.25ha. All of the cucumbers produced are grown in open fields.

## 3.0 Production

The average cultivated area during the period 2006-2009 was approximately 500ha. There was a decline to 184ha in 2010 (Figure 1).

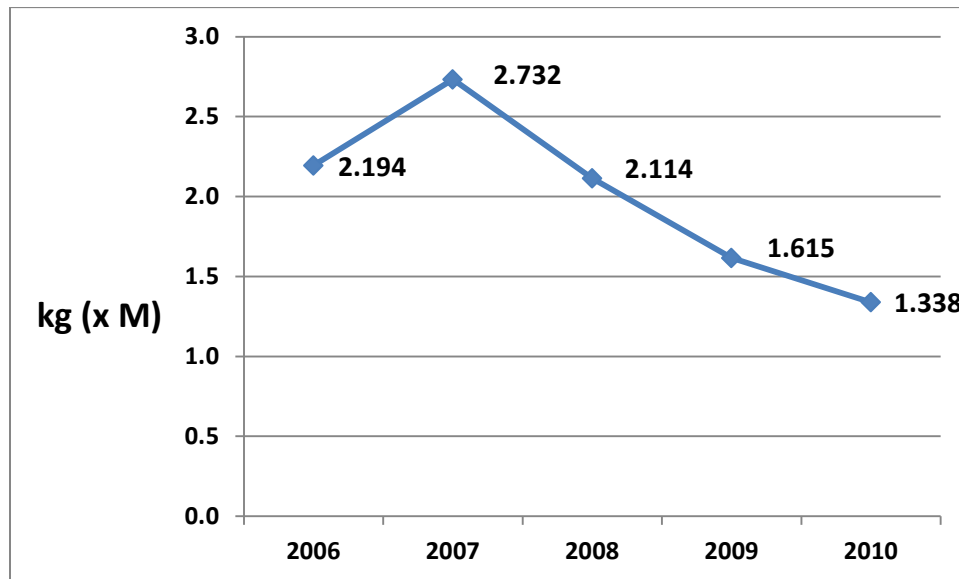
**Figure 1.** Area (ha) under cucumber cultivation in Trinidad & Tobago 2006-2010.



Source: MPSD, 2012

Over the period 2007-2010 production of cucumbers fell from a high of 2.732M kg in 2007 to 1.338M kg in 2010 (Figure 2).

**Figure 2.** Volume (M kg) of cucumber harvested in Trinidad & Tobago 2006-2010



Source: MPSD, 2012

The most popular variety of cucumber grown is the local type (slicing type). This is illustrated in Table 1.

**Table 1.** Volume (kg) of cucumber traded by variety at NWM in 2012.

Variety	Ashley	Gemini	Local	Marketer
Volume (kg)	2,096	254	1,133,543	144

Source: NAMIS

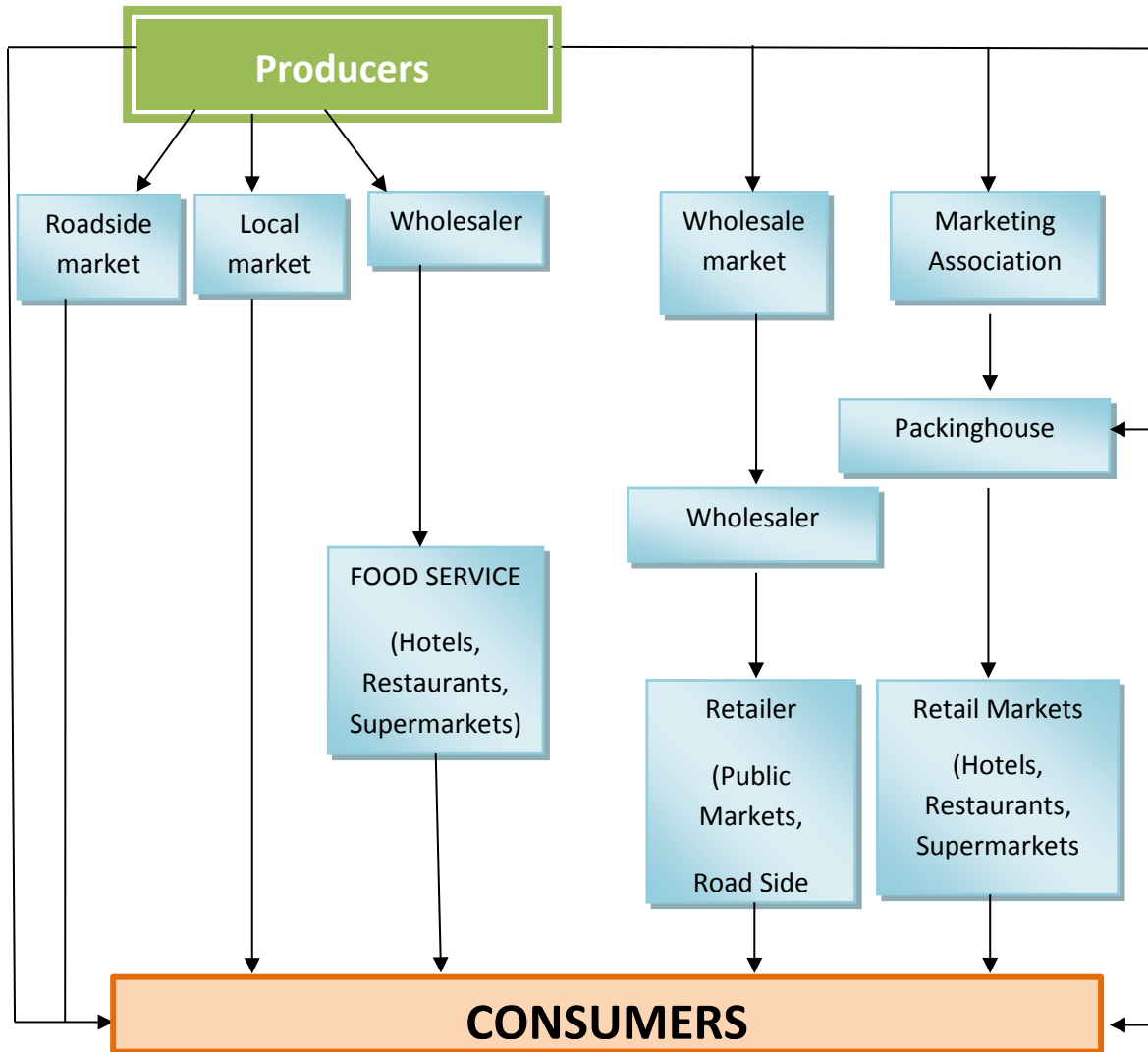
#### 4.0 Market Structure

The majority of local production is sold via the main market in the country, the Northern Wholesale Market (NWM). Over the last five years, 82% of the cucumber grown was sold via this market.

Apart from the NWM, producers sell to middlemen, retailers who operate at the public markets and road side stalls, as well as to supermarkets, hotels and restaurants.

Figure 3 shows the various marketing channels for fresh produce in the country.

**Figure 3. Marketing Channels for Fresh Produce.**



## 5.0 Markets

### 5.1 Wholesale Market Volumes

The volumes of cucumber traded at the main market, the NWM, has averaged 1.5M kg annually over the period 2009-2012 (Table 1).

**Table 1.** Volume (kg) of cucumber traded at NWM 2008-2012.

2008	2009	2010	2011	2012
1,518,578	1,999,489	1,534,081	1,170,870	1,127,071

Source: NAMIS

An analysis of volumes traded at the NWM shows that the peak months were in March, June to July and November (Table 2).

**Table 2.** Monthly volume ('000 kg) of cucumber traded at NWM in 2012.

Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
65.4	68.1	107.4	58.7	99.7	121.5	117.8	71.6	85.3	98.1	137.4	96.3

Source: NAMIS

## 5.2 Wholesale Prices

Since 2009, wholesale prices for cucumber increased by 31 % (Table 3).

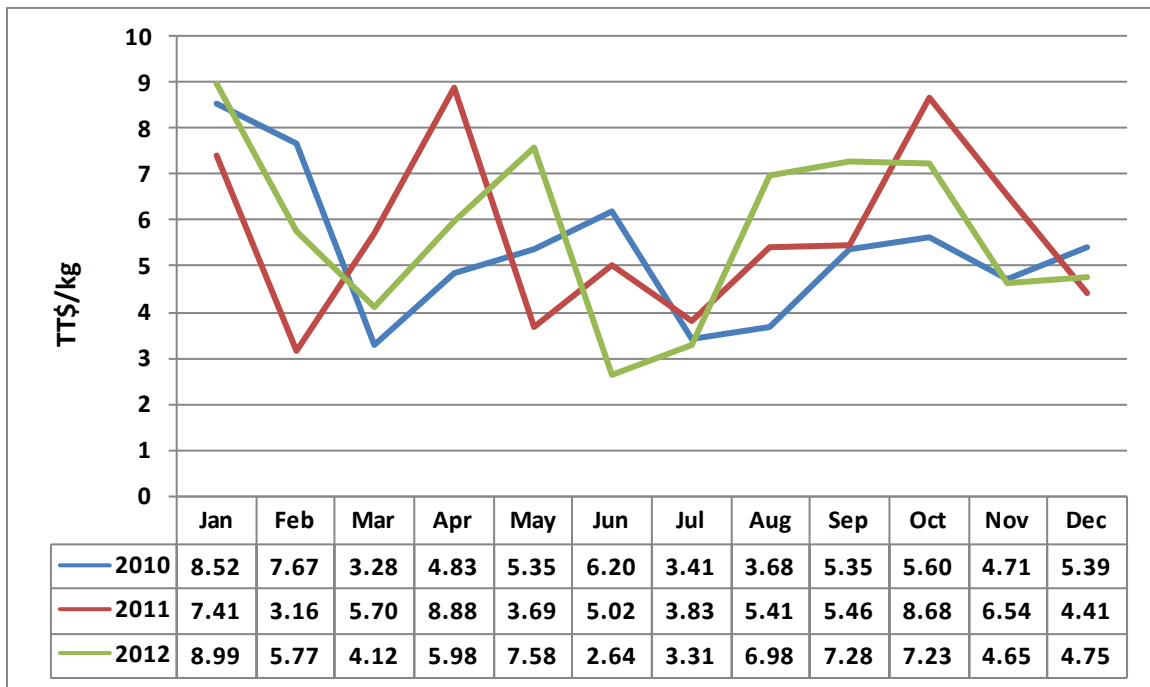
**Table 3.** Average annual wholesale prices (TT\$/kg) for cucumber at NWM 2008-2012.

2008	2009	2010	2011	2012
5.26	4.40	5.33	5.68	5.77

Source: NAMIS

An analysis of monthly prices for the years 2010-2012 show that prices peaked in February, May and September to October (Figure 4).

**Figure 4.** Monthly wholesale prices for cucumber (TT\$/kg) at NWM 2010-2012.

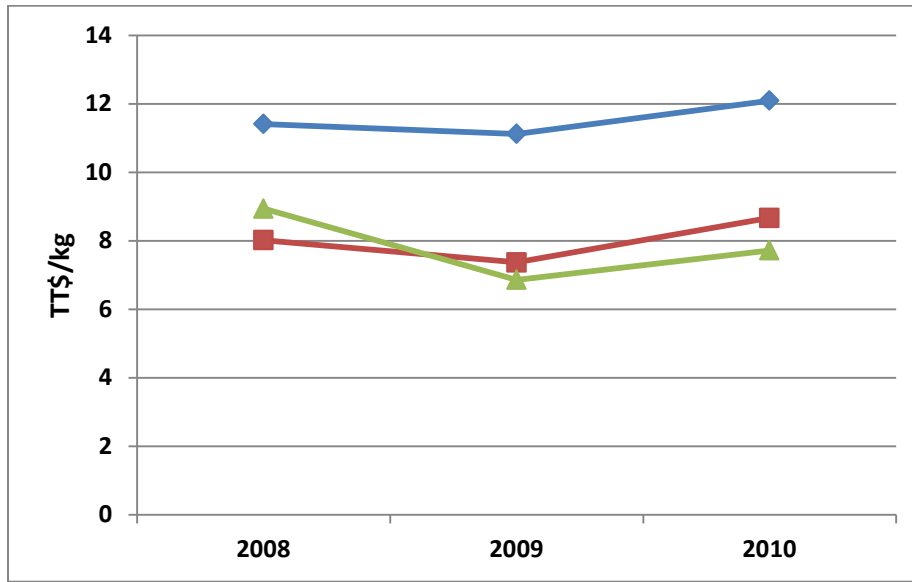


Source: NAMIS

### 5.3 Retail Prices

The average annual retail prices for cucumber over the period 2008-2010 have been in the range of TT\$8 to TT\$9 per kg at the Municipal Markets and approximately \$12 per kg at supermarkets (Figure 5).

**Figure 5.** Retail prices for cucumber (TT\$/kg) 2008-2010.



Source: NAMIS

### 6.0 Purchases by Type of Retail Outlets

A CARDI/CFC protected agriculture market study undertaken in 2011 showed that combined, supermarkets (57%), restaurants (38%), hotels (4%) and Tobago outlets (1%) purchased approximately 1.1M kg of cucumber annually (Table 4).

Amongst the supermarkets, Hi Lo Food Stores which has the largest chain of supermarkets in the country purchased an average of 4,104kg of cucumber weekly; followed by the Tru Valu chain with 1,528kg weekly (Figure 6). Subway was the largest buyer in the restaurant category with weekly purchases of 7,727kg (Figure 7).

**Table 4.** Annual purchases (kg) of cucumber by Supermarkets, Restaurants, Hotels and Tobago.

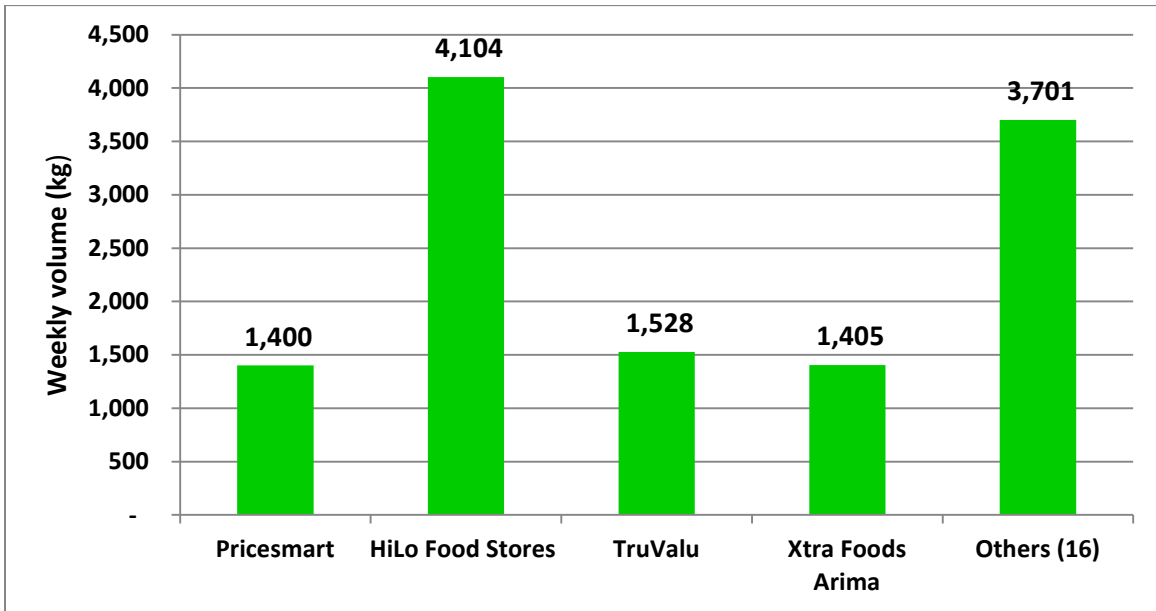
Supermarkets	Restaurants	Hotels	All outlets in Tobago*	Total
630,240	412,204	45,760	9,048	1,097,252

Source: CARDI/CFC Protected Agriculture Project Market Study 2011.

\*Cumulative figure shown for purchases by the various outlets in Tobago.

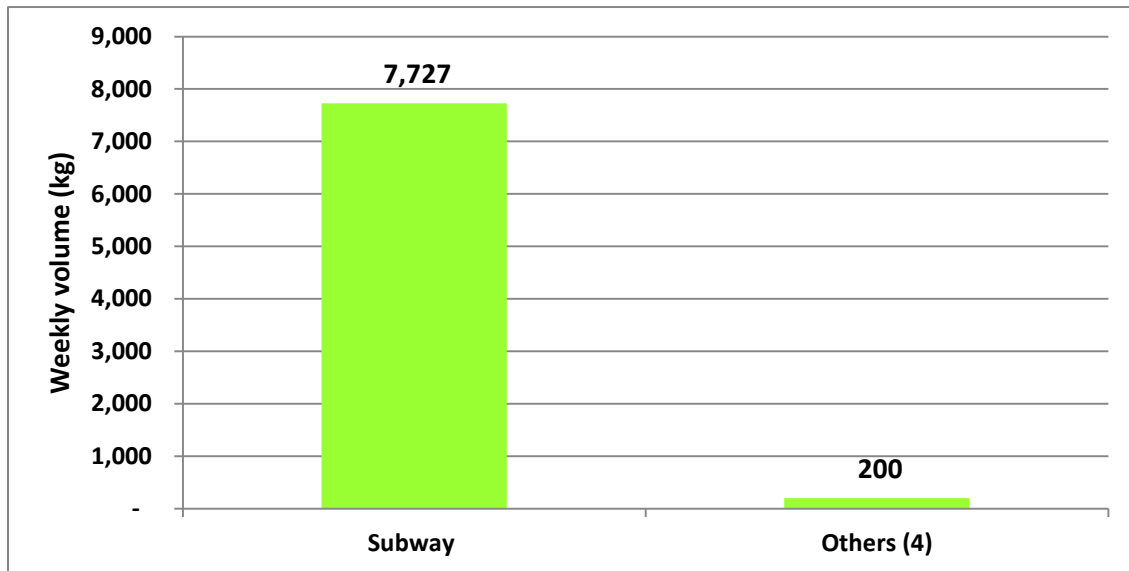


**Figure 6.** Weekly cucumber demand by Supermarkets.



Source: CARDI/CFC Protected Agriculture Project Market Study 2011.

**Figure 7.** Weekly cucumber demand by Restaurants\*



Source: CARDI/CFC Protected Agriculture Project Market Study 2011.

\* Five main restaurant chains surveyed comprising of 67 outlets.

## 7.0 Exports

Over the period 2006-2010 exports of cucumber increased sixfold from 43t to 249t in 2010 (Table 5). The main export market was Barbados. Trinidad and Tobago has an Agricultural Trade Protocol with Barbados which allows for exports to the latter, provided the product comes from farms certified by the National Agricultural Marketing and Development Corporation (NAMDEVCO). The total value of exports in 2010 was TT\$0.67M.

**Table 5.** Exports of cucumber from Trinidad & Tobago-2006-2010.

2006		2007		2008		2009		2010	
<b>Quantity (MT)/Value (TT\$ MN)</b>									
43	<b>0.334</b>	190	<b>0.592</b>	245	<b>0.536</b>	299	<b>0.510</b>	249	<b>0.668</b>

Source: UN International Trade Centre

## 8.0 Market Access

### 8.1 Local Market

Local production is protected by an import duty of 40% for supplies from extra regional sources. Imports from within CARICOM are free of duties; however they are subject to phytosanitary and other measures as stipulated by the Agricultural Trade Protocols in place and also the Plant Quarantine regulations.

### 8.2 Export Markets

#### 8.2.1 CARICOM

Export of cucumber to CARICOM countries are subject to meeting the entry requirements of the respective countries. Currently, Trinidad has Agricultural Trade Protocols with Barbados, Guyana and Antigua and Barbuda which regulate the trade in agricultural produce between these countries. The Protocol with Antigua and Barbuda has not operated for a number of years because of a suspension by that country due to the outbreak of Black Sigatoka disease in Trinidad.

Cucumber can only be exported to these countries providing it comes from farms certified and monitored by the NAMDEVCO.

#### 8.2.2 Other Countries

There have been no recorded exports of cucumber to other countries including the USA, Canada and the United Kingdom.

## **9.0 Outlook for Protected Agriculture (PA) grown Cucumber**

There is potential for PA grown cucumbers, especially with regards to bulk sales to franchised restaurants, such as Subway who require approximately 8,000kg weekly. The challenge is to provide consistent supplies at fixed prices. Supermarkets provide another market segment; within this segment, Hi Lo Food Stores purchase over 4,000kg per week. The feasibility of packaging and branding for the retail market segment to obtain premium prices should be explored.

A coordinated approach to production and marketing by the growers in conjunction with their Association will certainly enable them to exploit these market opportunities.

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