



Government of Jamaica
Ministry of Industry, Commerce, Agriculture & Fisheries

MINISTRY PAPER /2016



Performance Report 2015 – 2016

June 7, 2016

Foreword

The Ministry of Industry, Commerce, Agriculture & Fisheries presents its Performance Report for the financial year ending March 31, 2016.

MICAF is a new Ministry, representing a merger of the Industry and Commerce components of the old Ministry of Industry, Investment and Commerce (MIIC) and the previous Ministry of Agriculture and Fisheries (MOAF). For the reporting period, MIIC and MOAF operated as separate entities; hence despite the merger, the report will largely reflect this.

In going forward, the aim is to fully integrate the different components to a single, functional ministry. The synergies between industry and agriculture are obvious and the Ministry intends to leverage these as the government intensifies its thrust for economic growth and job creation. Agro-industry is vital in realizing this objective; and the Ministry intends to promote and facilitate increased integration into supply and value chains. These will be reflected in the 2016-2017 Performance Report.

The 2015-2016 Performance Report will present the Ministries' planned deliverables as reflected in the Ministers' Budget Speeches, 2015/2016 Operational Plans and Strategic Business Plans 2015 – 2017 for the Agriculture & Fisheries and Industry & Commerce Portfolios. It should be noted that planned deliverables were aligned with the goals established in the Vision 2030 Jamaica- National Development Plan. This plan provides both the policy framework, priority setting and implementation guide which drives the programmes and projects in the Ministry as it carries out its mandate.

The annual report demonstrates the MICAF's commitment to effective public performance reporting, transparency, and accountability to the stakeholders and the general populace.

The performance of the MICAF is reflective of the continued commitment to the achievement of the Jamaica's Vision 2030 Outcome 8 and Outcome 12 – An Enabling Business Environment & Internationally Competitive Sectors.

Vision

Innovative, sustainable and internationally competitive industries in agriculture, fisheries, manufacturing, creative and other service sectors

Mission

To create an enabling environment to grow and sustain industries, advance standards, ensure food security & safety, consumer protection and foster social and inclusive economic development, for the overall well-being of our people through the sustainable management of our resources utilizing internationally competitive structures in commerce, manufacturing, services, agriculture and fisheries.

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Accronyms

MICAF	Ministry of Industry, Commerce, Agriculture and Fisheries
EU	European Union
ACP	African Caribbean and Pacific
CIB	Coconut Industry Board
ITC	International Trade Centre
CARDI	Caribbean Agricultural Research Development Institute
ACP	Agricultural Competitiveness Programme
EDF	European Development Fund
JBDC	Jamaica Business Development Corporation
BSJ	Bureau of Standards of Jamaica
HACCP	Hazard Analysis and Critical Control Points
CLA	Cannabis Licensing Authority
CMU	Coordinating and Monitoring Unit
INBAR	International Network of Bamboo and Rattan
SEZ	Special Economic Zone
SADP II	Revised Sugar Area Development Programme
SDAs	Sugar Dependent Areas/communities
IEC	Electro-technical Commission
NAITS	National Animal Identification System
JACRA	Agricultural Commodities Regulatory Authority
FSMA	Food Safety Modernization Act
NFA	National Fisheries Authority
F MDF	Fisheries Management and Development Fund
SIRI	Sugar Industry Research Institution MSMEs
SFCAs	Special Fishery Conservation Areas

MSMEs	Micro, Small and Medium-size Enterprises
SSF	Self-Start Fund
SBDC	Small Business Development Centre
JIPO	Jamaica Intellectual Property Office
IP	Intellectual Property
JIPO	Jamaica Intellectual Property Office
IMF	International Monetary Fund
PIOJ	Planning Institute of Jamaica
IPS	Irrigation and Production Schemes
FFS	Farmer Field Schools
NAITS	National ID and Traceability System
OTB	Office of the Trustee in Bankruptcy
NQP	National Quality Policy
CPC	Chief Parliamentary Counsel
COJ	Companies Office of Jamaica
TBIS	Trade Board Information System
NES	National Export Strategy
UNCTAD	United Nations Conference for Trade and Development
MOU	Memorandum of Understanding
WTO	World Trade Organisation
CDDSA	Customs Duties (Dumping and Subsidies) Act of 1999
MTF	Medium Term Framework
CPT	Consumer Protection Tribunal
CMS	Customer Management Software
LACF	Latin American Competition Forum
PCT	Patent Co-operation Treaty

OPC	Office of the Parliamentary Counsel
WIPO	World Intellectual Property Organization
SIPPA	Secured Interests in Personal Property Act
NCRA	National Compliance & Regulatory Authority
ILAC	International Laboratory Accreditation Cooperation
MLA	Multilateral Agreement
IAAC	Inter-American Accreditation Cooperation
NCCRP	North Coast Craft Revitalization Project
MEDA	Micro Enterprise Development Agency
USAID	United States Agency for International Development
CBI	Caribbean Basin Initiative
NAS	National Adaptation Strategy
JBAMs	Jamaica Banana Accompanying Measures Programme
BEEP	Banana Export Expansion Programme
JDDDB	Jamaica Dairy Development Board

1. Performance of Key Sectors

1.1 Agricultural Sector

The year 2015 proved to be a challenging one for the agricultural sector. The effects of the 2014 drought carried over into 2015 and were further compounded by an even more severe drought in most areas of the country. Despite the challenges, the resilience of the sector was manifest. Thus overall, the negative effect on the sector were only marginal, with the sector recording a very slight decline of 0.1% for the calendar year 2015 as compared to 2014. The sector accounted for 6.6 per cent of total National Gross Domestic Product.

Although the drought significantly affected the sector, one should note the performance of onions, which is driven by a Ministry programme to reduce our dependence on imported onions, saw a 68.1 % increase in production over 2014 and coffee, which showed an approximate increase of 26.8 % for the calendar year 2015 over 2014.

Despite a slight misalignment of demand and supply near year end, broiler meat production recorded the highest ever national production level of just over 112 million kilograms.

The First Quarter (Jan – March) of 2015 saw the Domestic Agricultural Crops sub-sector, which is dominated by short-term crops, recording an increase of 3.4 % over the corresponding quarter of 2014. This recovery came on the heels of the severe drought that started mid-2014 and negatively affected production island-wide. Recovery from the drought for the long term Traditional Crops took longer. Hence poor performance in that sub-sector helped to pull down overall performance in the overall Agricultural Sector, to a marginal decline of 0.6 %.

Exacerbating the severe drought early 2015, the dry conditions helped to fuel damaging bush fires in many areas especially affecting vegetable and tuber crop production in the high production South-Central parishes of St Elizabeth, Manchester and Clarendon. The impact on production and productivity resulted in the Domestic Agricultural Crops sub-sector declining by 4.6%, for the April to June Quarter.

Despite the decline in domestic crops, however, growth among most of the traditional export crops (sugar, banana, and coffee) served to offset the decline and based on the provisional estimates from PIOJ, the overall agriculture sector grew by approximately 0.3 % for the Quarter.

As the year advanced, the drought worsened and spread, negatively impacting production. Early drought mitigation interventions as well as greater use of lands in irrigated areas including the agro-parks did have some tempering effects. As a result, the Third Quarter (July to September) saw some positive growth with Domestic Crops growing by 2.0 % and the overall sector, again bolstered by growth in the Traditional Crops, recording growth of 4.2%.

Nonetheless the drought was still affecting production and did not start to break until late September. This showed in the Fourth Quarter, where, despite the best efforts of the Ministry

and the farmers, the domestic crops sub-sector declined by 5.7 %. The overall sector declined by approximately 3.3 %.

The sector is poised for growth with improving systems and strategies, and expectations are that it will see a significant rebound in 2016.

Achievements of Traditional Crops for 2015

Gross output for Traditional Export Crops grew by 0.1 per cent. In this sub-industry, Banana production improved by 6.3 per cent while Sugar Cane production fell by 11.6 per cent. Banana and Sugar Cane combined accounted for 87.0 per cent of the value of the Traditional Export Crops sub-industry. Increased production was also recorded for Coffee and Citrus (up 10.4 and 4.4 per cent respectively) while Cocoa declined by 44.8 per cent. Earnings from Traditional Export Crops were US\$28.5 million compared with US\$18.7 million in 2014. The increase in the value of exports was due mainly to improved earnings from Coffee (up 86.9 per cent to US\$25.2 million). Earnings from Pimento, Citrus and Cocoa declined. Pimento declined by 41.7 per cent to US\$1.4 million; Citrus exports fell by 26.8 per cent to US\$1.3million; and Cocoa exports went down by 60.8 per cent to US\$0.4 million.

Sugar Cane

For the 2014/2015 crop year (November 2014–October 2015), 1, 572,400 tonnes of sugar cane were milled from which 128 700 tonnes of sugar was produced (Table 2). This compared with the previous crop year when 1, 779, 258 tonnes of sugar cane were milled, which yielded 148,271 tonnes of sugar. The decline in the volume of sugar cane milled was due to major factory upgrading activities at some factories, the downsizing of operations at one factory as well as the prolonged drought conditions. As a result, sugar cane supply declined by 11.6 per cent. Sugar cane supplied by the Private Farms^[1] declined by 5.1 per cent to 736 100 tonnes while sugar cane supplied by Estates declined by 16.7 per cent to 836 300 tonnes (see Table 2).

The quality of sugar cane produced during the crop year showed deterioration. This was reflected in the tc:ts^[2] ratio (the amount of sugar cane used to produce one tonne of sugar) which moved to 11.71 tonnes from 11.53 tonnes in the previous crop year. The deterioration in the quality of sugar cane produced was linked to the adverse drought conditions.

For the 2014/15 crop year, the ex-factory price for sugar was \$70,419 per tonne, moving from \$80.,020 in the previous crop year (Table 3). The reduction in the price of sugar was linked to the reform of the European Union (EU) Sugar Regime which has eroded the preferential treatment of the African Caribbean and Pacific (ACP) exports of raw sugar to the EU. The proportionate allocation of the ex-factory price between sugar cane growers and manufacturers remained at a ratio of 62:38.

The volume of sugar exported for calendar year 2015 was 78 476 tonnes valued at US\$56.2 million compared with 88 509 tonnes in 2014 valued at US\$65.3 million (Table 3). The decline in

^[1] Sugar cane is supplied to the factories from two sources, namely, Private Farms and the Estates operated by the factories.

^[2] tonnes cane:tonnes sugar

earnings from exports reflected a downward movement in the price of sugar obtained on the export market as well as the reduced volume of exports. The majority of the sugar was exported to the European Union (64 571 tonnes), while 13 202 tonnes was exported to the USA and 703 tonnes to other destinations.

PRODUCTION STATISTICS: SUGAR CANE AND DERIVATIVES, 2011 - 2015						
PARTICULARS	UNIT OF MEASURE	2011	2012	2013	2014	2015
		Cane Milled (Crop year)				
Total	'000 tonnes	1518.3	1475.2	1402.6	1779.3	1572.4
Farmers		613.0	561.6	573.4	775.3	736.1
Estates		905.3	913.6	829.2	1003.9	836.3
Sugar Production (Commercial)						
Calendar year	'000 tonnes	137.8	130.7	120.4	143.2	128.7
Crop year	'000 tonnes	134.3	126.4	122.8	148.3	128.7
Acreages reaped (Industry)						
Total	'000 hectares	27.9	28.1	29.2	29.7	27.5
Farmer		10.6	10.9	12.6	13.1	12.9
Estates		17.3	17.1	16.6	16.6	14.6
Tonnes Cane per Hectare						
Industry		54.4	52.6	48.0	59.9	57.2
Farmers		57.8	51.3	45.6	59.2	57.1
Estates		52.4	53.4	49.9	60.4	57.3
Tonnes Cane per Commercial Sugar		11.31	11.21	11.42	12.00	12.22
Tonnes Cane per 96 Sugar		10.88	11.21	10.94	11.53	11.71
Tonnes Sugar per Hectare		5.01	4.69	4.39	5.20	4.68
Molasses						
Production	'000 tonnes	59951	57166	54878	71746	68124
Export	'000 litres	0.0	0.0	0.0	0.0	0.0
Value	US\$'000	0.0	0.0	0.0	0.0	0.0

Source: Sugar Industry Authority

Table 1: Production Statistics: Sugar Cane & Derivatives

SUGAR EXPORTS BY DESTINATION 2011 - 2015

DESTINATION	2011		2012		2013		2014		2015	
	Quantity (tonnes)	Value (fob) US\$'000	Quantity (tonnes)	Value (fob) US\$'000	Quantity (tonnes)	Value (fob) US\$'000	Quantity (tonnes)	Value (fob) US\$'000	Quantity (tonnes)	Value (fob) US\$'000
EUROPEAN UNION	94,440	51.1	103,118	96.3	82,405	71,086	77,457	59,406	64,571.5	49,482.8
USA	16,283	13.2	0	0	0	0	11,016	5,883	13,201.9	6,302.3
OTHER	27	0.03	36	0.04	64	78	36	51	702.8	393.0
TOTAL	110,750	64.3	103,154	56.3	82,469	71,164	88,509	65,340	784,762	561,782

Source: Sugar Industry Authority

Table 2: Sugar Exports by Destination, 2010 - 2014

Bananas^[3]

Banana production during 2015 was estimated at 54,810 tonnes compared with 51,581 tonnes in 2014 (Table). The improved output occurred despite drought conditions which negatively impacted yields, especially in the last quarter of 2015. The improvement in output was attributed to the Jamaica Banana Accompanying Measures Programme which provided farmers with:

- Training and technology transfer in various aspects of production and post-harvest management in Jamaica
- Extension support
- Support to attain GLOBALGAP certification.

This programme was spearheaded by the All Island Banana Growers Association which supplied material inputs, administered the revolving loan programme and provided market alignment for the secondary produce. In 2015, a total of 318 tonnes of the fruit valued at US\$242,000 was exported compared with 211 tonnes valued at US\$179 217 in 2014.

Coffee

The volume of coffee berries delivered to processing plants during the 2014/15 crop year (August 2014 – July 2015) improved by 10.4 per cent to 5 847 tonnes compared with the previous crop year (see Table 4). The improvement in output should however be viewed against the background that production in the previous crop year was severely affected by the Coffee Leaf Rust disease. As a result, this represented the lowest national production since the 1988/89 crop year when the industry was adversely affected by Hurricane Gilbert. However, dryer conditions during the

^[3] Based on national accounting conventions stipulated by the Statistical Institute of Jamaica, banana production for both export and domestic consumption is captured in the Traditional Export Crop category.

2014/15 crop year coupled with improved management practices reduced the impact of the Coffee Leaf Rust disease which gave rise to the improved output of the crop.

Deliveries of Blue Mountain coffee improved by 17.9 per cent to 5 216 tonnes while Non-Blue Mountain cherry coffee declined by 27.7 per cent to 631 tonnes. The decline in Non-Blue Mountain coffee was due to the less attractive return on investment when compared with Blue Mountain coffee. The weighted average farm gate prices paid for Blue Mountain and Non-Blue Mountain cherry coffee by 75.0 per cent and 34.6 per cent to \$385 805 and \$128 602, respectively. The value of coffee exported during 2015 was US\$25.2 compared with US\$13.5 million in 2014.

Citrus

For the 2014/15 crop year (July 2014–June 2015), citrus production was estimated at 74 336 tonnes, an increase of 4.4 per cent (see Table 4). Although there was an increase in output, the Citrus Greening Disease continued to be the main challenge for this sub-industry. The technology to control the disease was available but unaffordable to some farmers. The disease infected trees produced predominantly green fruits which failed to ripen.

Production of Selected Traditional Export Crops

PARTICULARS	CROP YEAR	UNIT	2011	2012	2013	2014	2015	% change 2014/15
1. Bananas	Jan - Dec	Tonnes	46660	47473	37211	51581	54810	6.3
2. Citrus								
Est. Total Prod'n	Jul- Jun	Tonnes	106922	97072	83758	71194	74338	4.4
SWEET ORANGE			100093	91657	79178	67302	70540	4.8
GRAPEFRUIT			800	571	614	522	604	15.7
ORTANIQUE			4661	3880	3428	2912	2840	-2.5
UGLI			1368	884	540	459	352	-23.3
3. Coffee (cherry)	Aug - July							
Est. Total Prod'n		Tonnes	8099	6637	6884	5298	5847	10.4
Blue Mountain			6574	5576	5889	4425	5216	17.9
Non-Blue Mountain			1543	1111	1146	873	831	-27.7
4. Cocoa	Oct - Sept							
a) Deliveries to processing plants		Tonnes	499	1393	997	1154	637	-44.8
b) Out-turn from Processing plants		Tonnes	200	557	399	462	255	-44.8

Production of Selected Traditional Export Crops

PARTICULARS	CROP YEAR	UNIT	2011	2012	2013	2014	2015	% change 2014/15
5. Coconut	Jan- Dec	Millions	95.6	96.4	97.4	99.2	80.8	-18.5
Source: Commodity Boards								

Table 3: Production of selected Traditional Export Crops

Coconut

Production for 2015 was estimated at 80.8 million coconuts compared with 99.2 million in 2014. The decline in output was attributed to drought conditions, improper agronomic practices and the Lethal Yellowing disease. The Coconut Industry Board (CIB) continued its programme of developing a variety of coconut which will be resistant to the Lethal Yellowing disease. This was done by introducing and testing foreign coconut germplasm into areas affected by coconut lethal yellowing for disease resistance.

The CIB continued its effort of removing and burning all lethal yellowing infected coconut trees as a means of controlling the spread of the disease and replaced where possible with healthy coconut seedlings. The number of lethal yellowing diseased trees reported to the Board during 2015 was 3 598 compared with 5 530 in 2014.

During 2015, the International Trade Centre (ITC) signed a contribution agreement with the European Union for the execution of a coconut development project for the Caribbean to be executed in nine countries including Jamaica. The project is entitled: “Coconut Industry Development for the Caribbean”, and is being implemented over 48 months by the Caribbean Agricultural Research Development Institute (CARDI), under an Agreement with the ITC. This project is part of a programme for ACP countries funded under the 10th European Development Fund (EDF) for a total cost of Euro 3.5 million.

FARMGATE PRICES OF SELECTED TRADITIONAL EXPORT CROPS, 2010 - 2014

PARTICULARS	UNIT	2011	2012	2013	2014	2015p	% change 2014/15
1. Sugar	J\$/Tonne	47,925	75,594	75,594	80,020	70,419	-12.0
2. Bananas							
Price to Growers	J\$/Tonne	44,000	55,115	55,115	55,115		
3. Citrus							
Oranges	J\$/Tonne (solids)	168,000	212,800	209,000	246,400	302,400	22.7
Ortaniques	J\$/Tonne (solids)	168,000	212,800	209,000	246,400	302,400	22.7
Grapefruits	J\$/box	185	220	380	420	450	7.1
4. Coffee							
Price to Growers							
- Blue Mtn	J\$/Tonne	113,677	121,253	128,602	183,717	321,504	75.0
- Non-Blue Mtn	J\$/Tonne	69,673	73,487	91,858	95,533	128,602	34.6
5. Cocoa	J\$/Tonne	162,000	200,000	200,000	200,000	200,000	0.0
6. Pimento	J\$/Tonne	253,000	253,000	264,000	418,875	462,966	10.5
7. Coconut Seeds	J\$/Seeds	50	50	50	50	50	0.0
p - preliminary							

Source: Based on data supplied by Commodity Boards and the Ministry of Industry, Commerce, Agriculture & Fisheries

Table 4: Farmgate Prices of selected Traditional Export Crops, 2010 - 2014

Cocoa

The volume of wet cocoa beans delivered to fermentaries for the 2014/15 crop year (October 2014–September 2015) was 637 tonnes compared with 1 154 tonnes in the previous crop year (see Table 4). The decline in output was attributed mainly to drought conditions prior to and during the crop year which negatively affected the development of the fruit. This was evident as information from the climate branch of the Meteorological Service of Jamaica indicated that for the months of June and July of 2014, prior to the crop year, the island recorded rainfall levels of 33.0 per cent and 37.0 per cent of the 30-year mean, respectively. Clarendon, one of two the main cocoa producing parish, recorded rainfall levels as low as two per cent and 12.0 per cent of the 30-year mean for the months of June and July, respectively. The severe drought conditions in Clarendon hampered production levels during the crop year.

The farm-gate price paid to farmers for cocoa during the crop year remained unchanged at \$200 000 per tonne (see table 5). The value of exports for calendar year 2015 was US\$403 000 compared with US\$1.0 million in 2014.

1.2 Manufacturing Sector

The Manufacturing Sector which accounts for 8.6% of the Gross Domestic Product, grew by 3.1 per cent during 2015, according to the Planning Institute of Jamaica. This growth was strongly influenced by increased production in the Food, Beverages and Tobacco and Other Manufacturing sub-industries. There were several factors which contributed to the performance of the sector, one of which was the reduction in the cost of electricity due to lower crude oil prices on the international market. The sector also experienced improved demand for some commodities and was positively impacted by the resumption of normal production activities at the Petrojam Refinery.

Throughout the year, the Manufacturing Sector also benefited from several interventions through the then Ministry of Industry, Investment and Commerce (MIIC) and its respective agencies. These interventions were geared towards enhancing the business environment, building capacity and providing institutional support all geared toward increasing the competitiveness of the sector. Several agencies also directly supported players in the Sector through training and development particularly with respect to international standards, facilitation of investments and business to business linkages.

1.3 Micro, Small and Medium Enterprises Sector

During 2015 the major activities of the Micro, Small and Medium Enterprise sector were geared towards expanding access to business development services, enhancing the overall business environment for the sector and improving access to capital. Toward this end, there was continued focus on the implementation of the MSME and Entrepreneurship Policy in an effort to improve the business environment and bolster support for the sector. This influence the decision to establish the MSME office in January 1, 2016 to provide a cohesive and coordinated work programme for effective implementation of the policy framework.

Development and business services for the sector also continued through entities such as the Scientific Research Council, the Technology Innovation Centre, Jamaica Business Development Corporation (JBDC) and the Bureau of Standards of Jamaica (BSJ) with the latter two entities being agencies of the MICAFA. The business services offered by the JBDC included eight (8) mobile business clinic sessions for the year and the Annual Small Business Expo involving 360 participants who benefitted from 35 exhibits from selected companies, 10 workshops and 5 panel discussions. The agency has reported that a total of 3, 324 MSMEs utilized its services in 2015 although this was 28 less than the amount for 2014. The BSJ also continued its assistance to the MSME sector, primarily through development of standards and delivery of capacity building workshops. During the year, the BSJ delivered a total of 31 training and development courses to 475 persons and sought to build awareness of its services available to the sector by providing information on registration requirements for processed food establishments, good manufacturing

practices, labelling and testing requirements for products and the Jamaican standard for food processing using the principles of Hazard Analysis and Critical Control Points (HACCP).

Micro and small enterprises accounted for 78.6 per cent of GCT registered companies in 2015, compared with 79.1 per cent the previous year. Preliminary data on GCT returns show that the number of Micro and Small Enterprises engaged in business activities in 2015 totalled 9,553-- a decline when compared with the total of 9,904 registered MSEs in 2014. Sales for the micro and small enterprises also declined in 2015. Total sales for MSEs reportedly fell by 8.7 per cent to \$43.3 billion. On the upside, however there was growth in the value and volume of loans disbursed by some entities that provided financing to the sector. For example, the Development Bank of Jamaica, the main wholesale lender to the sector, reported an increase in disbursements by 10.1 per cent to \$1, 430.8 million.

2. Ministry's Priority Programmes, Initiatives & Projects

Industry and Commerce Portfolio

The internal divisions under the Industry and Commerce portfolio focused on enhancing the business and trade environment, protecting and improving consumer welfare and development of industry and business. The specific priorities undertaken in 2015/16 are detailed below:

2.1 Industry and Business Development

Micro, Small and Medium Enterprises Programme

Aims & Objectives

- To facilitate the development of a policy environment that will meet the GoJ vision of 'inclusive growth' with a vibrant MSME sector making a contribution to sustainable employment and revenue generation.
- To provide leadership on policy issues relating to the MSME sector while introducing new policy, programmes and initiatives to fuel growth in the sector.
- To ensure proper stakeholder dialogue through the appropriate consultative process.
- To ensure linkages between MSMEs and other critical development programmes and generate synergies and complementary initiatives across government.
- To improved promotion and outreach to the sector while improving the responsiveness to the sectors needs
- To update and regularize the management of the CMU and undertake the necessary policy research to inform recommendations on the future placement and management of the CMU in the GoJ microfinancing environment.
- To establish the MSME Office as a permanent division in the GoJ Establishment Act and to transition MSME policy activities to that MICAF Division.

Establishment of the MSME Office

- The MSME Office was implemented on Jan 1, 2016¹ as an interim arrangement until the MSME portfolio could be incorporated as a functional division within the Ministry.
- This was done using resources from two legacy programmes that were being managed by a Coordinating and Monitoring Unit (CMU) in the Ministry.

¹ The Office was established January 1, 2016 but did not get full time staff assigned until February 1, 2016.

- The proposal for the leveraging of the CMU to establish the MSME was supported and approved by the Finance Ministry. The MSME Office provides a cohesive framework for the MSME initiatives within the Ministry and across government.

Planned Targets

- Oversees the execution and implementation of the MSME Policy.
- Leads on the policy issues impacting the MSME sector
- Serve as a focal point for the implementation of the Small Business Development Centre (SBDC) Model
- Cabinet Submission prepared on issues related to the sector.
- Ensures preparation of technical documents & briefs providing analysis and advice to internal and external stakeholders
- Monitor issues related to the sector in terms of trends and emerging issues locally, regionally and internationally
- Manages relationships with key private sector stakeholders and partners in managing the policy interventions
- Monitors and make recommendation on draft legislation
- Design the terms of reference and documents related to special projects, technical assistance and short term consultants
- Agency liaison functions
- Streamlining administrative matters relating to the MSME Office and the CMU

Achievements

- Organized Common Board Strategic Retreat (JBDC, SSF & MIDA). A technical report of this retreat including the way forward was finalized.
- Series of introductory meetings were held with critical stakeholders of the MSME sector.
- Hosted of OAS Mission on SBDC Phase II.
- Position Paper on the Scaling Down of SSF was prepared and approved by Cabinet.
- Dialogue with the SBAJ regarding the coordinating and planning of the inaugural Caribbean MSME Conference.
- Preparation of documentation on the Dormant Funds Proposal for the Hon. Minister.
- Review of the Draft Regional MSME Policy for the 42nd COTED.
- Initiation of a consultative mechanism to ensure stakeholders comments on Regional Policy.
- Policy approval obtained from Hon. Minister to reactivate discussions with NLA on acquisition of 12 South Camp Road by JBDC.
- At request of the Common Board, Director of the MSME Office appointed Company Secretary for JBDC, MIDA and SSF (on a voluntary basis).
- Policy approval obtained from the PS MICAF to commence efforts to have an MSME Division established permanently in MICAF.
- Annual Reports for the SSF for the last five (5) years were tabled in Cabinet and subsequently the Houses of Parliament.
- MSME Programme Summary prepared and submitted for revised Strategic Business Plan.
- Initial discussions held with Governor's Office BOJ re MSME definitions.

- Working group formed with MFP on the Offset Regulations for the Government Procurement Act 2015
- Contribution of the “Outlook” narrative for the MSME sector in the 2015 ESSJ.
- Created a Stakeholder Register for MSME Office.
- Draft Concept Paper on the notion and definition of “Formality”

Principal Focus for 2016/2017:

The overall goal for the MSME Office in 2016/17, its first full year, is to establish partnerships with stakeholders in the MSME community, to build trust, collaboration, cooperation and communication. In keeping with this objective, the designated theme for the Office in 2016/17 as mandated by the Minister is “Partnerships for Prosperity”. Principal areas of focus are:

- Establish a National Catalogue of MSME initiatives
- Collaboration with MFP to complete Discussion Paper on Offset Regulations
- Meet timelines in SSF Action Plan for SSF Scaling Down
- Complete financial analysis of MIDA and submit recommendations on the way forward.
- Complete training as well as data input for 2011-2016 CMU records in QuickBooks
- Complete the establishment of the MSME Division in MICAF.
- Prepare and issue ToR for external auditing of (i) CMU accounts; (ii) SAGICOR funds under management and (iii) MIDA funds under management.
- Facilitate JBDC’s request for obtaining the property at 12 South Camp Road from the NLA.
- Pursue the Dormant Funds Proposal and begin implementation
- Submit Expression of Interest in SBDC Phase II & make policy recommendations re GOJ engagement in SBDC Phase II
- Work with MFP to finalize the Micro Credit Act
- Establish a National Catalogue of GOJ MSME Initiatives” for the MICAF website.
- Limited review of the MSME Policy (covering Definition and addressing formality).
- Establish the MSME Thematic Working Group as a consultative mechanism on MSME issues
- Convene Special Working Group on secondary sources of statistics available on the MSME sector.
- To conceptualize an Action Plan to increase space available for incubators and innovators.
- Establish a National Mentorship Programme

Commerce Division

Aims and Objectives

The Division has responsibility to design, recommend and implement policies, strategies, legislation and programmes that will ensure a stable, competitive and transparent commercial environment which balances the interests of domestic and regional producers, importers, retailers and consumers. It also ensures that the policy objectives of the Government of Jamaica are realized through effective coordination of the commerce portfolio of the ministry and that its work programme accurately reflects the Ministry's objectives.

The overall focus of the Division includes:

- development of policies to facilitate commerce and govern how business and trade activities are conducted within Jamaica; and
- creation of an enabling business environment.

Major Activities During 2015/2016

- Development of policies and monitoring in key areas of commerce - domestic and regional policy issues, projects, programmes, legislation and agencies that impact commerce
- Fostering and maintaining a stable, competitive and transparent commercial environment
- Providing business and trade facilitation support to the private sector
- Monitoring and providing support to commerce related agencies
- Balancing the interests of domestic producers, importers, retailers and consumers within national laws as well as regional and multilateral trade rules
- Management of trade issues including matters relating to trade facilitation in domestic, regional and international markets
- Regulation of fair trade on the domestic market
- Development of trade remedies in the event of unfair or injurious levels of imports
- Management of the use of regional and international measures to support domestic trade
- Application of provisions under the CARICOM Revised Treaty that govern trade
- Facilitation of the suspension of the CARICOM Common External Tariff and the issuance of Certificates under the Safeguard Mechanism
- Management and monitoring the supply of commodities, production, imports, exports and issues that impact quality, supply and prices
- Ensuring that the Ministry's statutory obligations under the Companies Act were performed
- Company and business registration
- Standards development and regulation
- Import and export monitoring and licensing
- Consumer protection
- Distributive Trade
- Improving the national quality infrastructure
- Motor vehicle import policy

MAJOR ACHIEVEMENTS DURING 2015/2016

- Consultative sessions held with stakeholders toward the amendment of the Motor Vehicle Import Policy
- One (1) Public Forum conducted on the Motor Vehicle Import Policy
- National consultations completed on the National Quality Policy and Revised Draft Policy finalized
- Policy position for cement imports revised in keeping with Cabinet Approved Safety Net Principle

- Monitored the cement industry and levels of imports to ensure consistency with the Safety Net Principle
- Maintained licensing framework for cement imports. Eleven (11) licenses were approved for cement imports into Jamaica
- Commenced policy research to identified areas to strengthen the framework/mechanisms for the protection and empowerment of consumers and providers and the promotion of consumer rights and safety
- Draft Policy Paper completed for Damaged Vehicle Import Policy. Draft Policy to be subjected to consultations
- Policy review commenced for the removal of the prohibition on the importation of used tyres
- Provided business facilitation support to approximately fifty (50) companies and individuals
- Thirty-seven (37) requests processed for suspension of the Common External Tariff to allow for the temporary departure from the applicable rates of duty on inputs for the manufacturing sector at a value of approximately USD\$162,350,194.00
- Twenty-nine (29) safeguard applications processed for the manufacturing sector to allow for the use of extra regional material in the manufacturing process and for the export of the finished products to CARICOM territories without being subject to import duties and other restrictions
- Four (4) public education programmes conducted
- Provided Secretariat support for the Motor Vehicle Import Policy Appeals / Interim Review Team
- Facilitated sixty (60) motor vehicle appeals
- Managed the issues of the COTED falling under the ministry's portfolio in keeping with the treaties that govern intra-regional trade and with national, regional and international obligations
- Represented portfolio trade issues at two meetings of the Caricom Council for Trade and Economic Development
- Ten (10) portfolio agency annual reports tabled in Cabinet
- Seventy-three (73) Standards approved to be declared Jamaican Standards
- Sixty-three (63) licences issued and six (6) extensions of exemption and one (1) extension of financial year approved in keeping with the statutory obligations under the Companies Act.
- Maintained monitoring mechanisms for Rice, Red Kidney Beans, Cement and Sugar as required by CARICOM Secretariat.

PRINCIPAL FOCUS FOR 2016/2017

- Amendment of the policy guidelines governing the importation of motor vehicles and the enforcement of regulations to give legal effect to the Motor Vehicle Import Policy
- Strengthen the national quality infrastructure to meet global standards and enhance competitiveness through the implementation of the Revised National Quality Policy

- Strengthen the consumer protection framework through the development of a National Consumer Policy
- Revision of the policy for the importation of used tyres
- Monitor specific industries and levels of imports to ensure consistency with national developmental objectives, make policy recommendations and ensure policy adjustments and licensing regimes are appropriate
- Monitor selected commodities to ensure consistent and quality supplies of basic items to meet the demands of the market
- Intensify the support to the business sector
- Improve the policy support provided to the portfolio agencies
- Strategic review of portfolio agencies to capitalize on opportunities for synergies and improved operational efficiencies
- Increase the use regional and international measures to improve domestic trade and exports
- Build and strengthen the capacities of exporters and manufacturers in targeted areas to stimulate activities that will grow industries/businesses, facilitate trade, increase exports and create employment opportunities
- Expand the commerce databases and strengthen the linkages with other data providers and the application of data and data analysis.

Industry Division

AIMS AND OBJECTIVES

- Support the sustainable development of new industries
- Improve and streamline business facilitation systems
- Facilitate small business development and the promotion of entrepreneurship
- Support industrial export development and expansion

MAJOR ACTIVITIES DURING FY2015/2016

Policy Development

- **Bamboo** - The Division worked with the Bureau of Standards in crafting the policy paper for the sustainable development of the bamboo industry. The focus of the policy is the responsible exploitation of the natural resource to support entrepreneurship among the vulnerable segment of society in particular. Consultations and discussion continue with key stakeholders including PIOJ, the Bamboo Industry Association of Jamaica and the International Network of Bamboo and Rattan (INBAR)/to revise the policy paper.
- **Film** - Since the merger of the two Ministries the function has been reassigned the Ministry of Economic Growth and Job Creation.
- **Medical Tourism**-Policy framework developed that sought to secure Jamaica's position as one of the preferred destination for medical tourists. Also reviewed and provided recommendation for the amendment of the policy.

MSME Development and Support

- Small Business Development Centre (SBDC), which is an OAS-sponsored technical assistance initiative designed to support the MSME sector by strengthening the capacity of the business support organisations (BSOs).
- Participated in the Mobile Business Clinics in an effort to share information, as well as to identify relevant policy related issues.
- Significant technical input and support was provided to the MSME Financing Implementation Matrix, a life-cycle business development and financing strategy that was developed to address the challenge of access to capital by small businesses in Jamaica.

Sector/Industry Facilitation

- **Manufacturing**-A significant portion of the Division's efforts was dedicated to the facilitation of the manufacturing sector, particularly in undertaking the process to make recommendations for the designation of the manufacturing status on companies.
- **Scrap Metal**-The Industry Division served as the ministry's lead in the administration of the scrap metal trade. This required the Division to process applications for special permit for the export of restrict items under the Trade (Scrap Metal) Regulations, 2013.
- **Ornamental Fishing**- Challenges impacting the industry were identified through stakeholder's consultation and implementable solutions proposed on how to revitalized and expand the industry.

Free Zone Support

- The Division served as the technical secretariat for the Free Zone Council, which required it to process applications and administer the movement of items from the free zones. During the third quarter of the fiscal year towards December 2015, the primary focus of the Division was to regularize the free zone companies in order to ensure a smooth transition into the new Special Economic Zone (SEZ) regime.

MAIN ACHIEVEMENTS DURING FY 2015/2016

- Draft Bamboo Policy developed and circulated among key stakeholders for feedback
- Organization of internal consultations regarding the draft Medical Tourism policy completed
- Review process has started for draft Cannabis policy framework
- SBDC pilot phase completed and evaluation report submitted to help determine advancement into phase 2 of the OAS Caribbean project
- Stakeholders within the film and animation industry were engaged. A Cabinet Submission that sought approval for the establishment of the fund was drafted.
- MSME Financing Implementing Matrix developed
- Crafted and developed protocols and operational policies that improved the overall efficiency of the manufacturing facilitation system.
- Freezone companies regularized through the development of a database. This was to ensure smooth transition into the new Special Economic Zone Regime.

PRINCIPAL FOCUS FOR FY 2016/2017

- Provide technical support to the MSME Unit in securing the procurement 'set aside' under GOJ Procurement Policy.
- Support the development of the Manufacturing Sector consistent with the Omnibus Incentive Regime.
- Provide technical input to the Black Belt Problem Solving Team in the development and implementation of the Ornamental Fish Strategy.
- Provide support for the creation of a tangible output from the Creative Industries Business Plan
- To establish a strategic focus on the development of the Services Sector
- Collaborate with the Bureau of Standard in the development of the Bamboo Policy Framework and the roll out of the implementation plan.
- Collaborate with JIPO to strengthen the legislative and operational framework for the promotion and protection of intellectual property
- Improve the operational efficiency of the division
- Provide technical support and guidance to the Minister regarding the conduct of the Scrap Metal Industry.

Trade Unit

AIMS AND OBJECTIVES

- Conduct research and provide technical support and advice in the area of international trade policy
- Undertake consultations to ensure harmonized trade policy positions
- Ensure trade policies are clearly articulated and implemented in the Ministries plans, policies, programmes and strategies
- Implementation of relevant Trade Facilitation (TF) measures, including the establishment of a national trade portal and single electronic window
- Development of a National Services Industry Policy (NSIP)

MAJOR ACTIVITIES DURING FY 2015/2016

- Trade Facilitation
- Private sector issues
- Bilateral Trade issues
- Regional Trade Issues
- Trade policy support
- Trade in Services

MAIN ACHIEVEMENTS DURING FY 2015/2016

- **Trade Facilitation:** Cabinet Submission on TF approved by Cabinet and steps taken to implement the Decisions.
- **CARICOM BTAs:** Provided inputs on market access and rules of origin to MFAFT and participated in regional consultations and negotiations on CARICOM-Costa Rica,

CARICOM-Colombia, CARICOM-Cuba, CARICOM-DR, CARICOM/Canada FTA and the T&T Partial Scope Trade Agreement (PSTA) with Guatemala.

- **Trade Enforcement Advisory Mechanism (TEAM):** Reviewed Rules of Origin, Anti-competitive practices, standards as well as market access impediments and made recommendations to the Minister for action.
- **IPWG Meeting of the Logistics Hub:** As a multi-sectorial, inter-agency committee, it has met and addressed Free Zone Legislations in Jamaica and the CARICOM territories, the SEZ Policy, the Treatment of Goods Imported from Free Zones and the findings of the Anti-Dumping and Subsidies Commission (ADSC) report on subsidization programmes in Trinidad and Tobago, and made appropriate recommendations to the Minister for action. The Trade Unit functions as the Secretariat for the IPWG.
- **Tools for Trade Training Programme:** The Trade Unit has been leading on the development of a “Tools for Trade Training Project”, which is intended as a capacity building programme to assist local exporters, businessmen and the general public to better understand the language, instruments, rules and architecture of international trade. The Unit has already drafted a proposal and the Trade Board Ltd. is seeking donor assistance for its implementation.
- **Private Sector/Bilateral Trade Issues:** responded to and provided support and guidance on private sector issues related to market access, rules of origin, antidumping, subsidies and countervail, threat of injury from imports, abuse of dominant position, unfair competition, and opportunities and rules for export.
- **Trade Policy Support:** Provided active support to the relevant Divisions/Units on trade and trade policy related issues.
- **Trade in Services:** Initiated research and commenced drafting of Services Concept Paper for the development of a national services industry policy.
- **Review and comments on draft policies and strategies:** Foreign Trade Policy, Medical Tourism, NES II, RoO for SEZ, Damaged Vehicles, Cultural and Creative Industries Indicators, Growth Agenda, procedures for monitoring cement, Fuel Subsidies, etc.
- **Drafting and provision of inputs** for speeches, statements, and press releases.
- **Cabinet Submissions:** executed Submissions for TF, Trade Board, Appointment of Hon. Trade Consul to Hong Kong, and reviewed Submission on DR-Haiti, etc.

PRINCIPAL FOCUS FOR FY 2016/2017

- **Trade Facilitation (TF):**
 - Initiation of stakeholder consultations on technical assistance and capacity building requirements to achieve TF reforms.
 - Complete formal notification of Jamaica’s timelines and needs, for the implementation of Jamaica’s TF commitments, to the WTO.
 - Complete work on the development of implementation plans for Outputs 4 and 5 of the TF Project Plan.
 - Re-engage the TF Task Force and provide guidance on the execution of the Single Trade Electronic Window (STEW).

- **Private sector/bilateral trade issues: Continuous monitoring of the** concerns regarding TBTs, Market Access, Rules of Origin and other factors impacting domestic, regional and international trade. Continued support to the private sector to address emerging as well as longstanding concerns, and continued engagement with bilateral trade partners on all issues of concern.
- **Trade policy support and coordination:** Continued support to the relevant Divisions/Units on trade and trade-related issues.
- **Trade in Services:** Complete research and finalize drafting of Services Concept Paper as well as initiate and complete the Draft National Services Industry Policy (NSIP). Continued engagement in discussions with JAMPRO and JCC pertaining to the transitioning of the JCSI to the JCC.
- **CARICOM BTAs:** Continued stakeholder consultations and coordination with the private sector on outstanding market access and rules of origin issues.

Agriculture and Fisheries Portfolio

The Ministry recognized that the Agricultural Sector must play a pivotal role in the Growth Agenda and in 2015/16 continue to reposition the sector to increase production and productivity through the following interventions:

2.2 Agro-Parks Development Programme

In the bid to support the Government of Jamaica's efforts at debt management, the Ministry continued its implementation of its Agro-Parks Development Programme by providing access to lands with requisite infrastructure to support investments in the production of selected crops directed towards import substitution and replacement as well as the provision of raw material for agro-processing and non-traditional exports. ***This initiative seeks to reduce our annual food import bill which is trending down from US\$1billion in 2014 to US\$687.7Million as at October 2015, thereby saving scarce foreign exchange as well as to earn scarce foreign exchange.***

Aim

To reduce the food import bill and increase exports, save foreign exchange as well as increase foreign exchange revenue

Planned Targets

- The full operationalization of nine (9) Agro-Parks across the Island
- 100 acres of land established for 20 select youths
- Institutional framework for Global Gap programme for Agro-Parks including action plan

Achievements

To-date, nine Agro Parks has been established and seven of these have commenced production. The 9 Agro Parks implemented are:-

1. Amity Hall - St. Catherine
2. Ebony Park - Clarendon
3. Yallahs - St. Thomas
4. Plantain Garden River (PGR) – St. Thomas
5. New Forest/Duff House (NF/DH) - Manchester, St. Elizabeth

6. Hill Run - St. Catherine
7. Meylersfield - Westmoreland
8. Spring Pain - Clarendon
9. Sweet River (multi specie) Abattoir – Westmoreland

Agro Parks	First Quarter (Apr - June)		Second Quarter (July - Sept)		Third Quarter Oct - Dec)		Fourth Quarter (Jan - Mar)	
	Target (ha)	Achievement (ha)	Target (ha)	Achievement (ha)	Target (ha)	Achievement (ha)	Target (ha)	Achievement (ha)
PGR	15		15	16.39	15	14.6	8.84	18.92
Amity Hall	50	25.9	20	18.6	50	21.62	29	24.29
Ebony Park	50	20.47	40	27.5	35	30.79	25	20.97
Spring Plain	7.6	7.8	7.6	4.53	7.6	9.97	7.6	4.38

Table 5: Actual Production against Target in Agro-Parks

Infrastructural Works

To date, the Ministry expended **J\$530.6M of the planned budget of J\$ 601M** to provide infrastructural works such as irrigation equipment, post- harvesting facilities, farm access ways, drains and sanitation facilities to complete the operationalization of nine (9) Agro-Parks:

Agro-Park	Infrastructural works	Production as at March 27, 2016
<p>1. Amity Hall, St. Catherine <i>Expended \$163.6M</i></p>	<ul style="list-style-type: none"> ➤ 150 acres of irrigation system installed; 15 irrigation control systems ➤ 5.5 km farm access roads upgraded; ➤ 950 acres cleared; installation of 16 electrical pole lines to serve irrigation pumping station; and ➤ 15,555 m of main drains cleared ➤ Construction of changing room and bathroom facilities 	514,519 kg (1,131,942 lbs) vegetables, condiments, tubers, fruit and cucurbits
<p>2. Ebony Park, Clarendon <i>Expended J\$11.2M</i></p>	<ul style="list-style-type: none"> ➤ 425 acres of irrigation infrastructure installed with a more extensive irrigation system to cover all the lands in this Agro-Park, as well as Spring Plain which is contiguous, is 	1,435,963 kg (3,159,119 lbs) vegetables, condiments, tubers, fruit and cucurbits

Agro-Park	Infrastructural works	Production as at March 27, 2016
	currently being implemented for over J\$300M	
<p>3. Plantain Garden River, St. Thomas</p> <p><i>Expended J\$113.0M</i></p>	<ul style="list-style-type: none"> ➤ 134 acres out of 290 acres of irrigation infrastructure installed; ➤ Clearing of 1200 meters internal drains; ➤ Cleaning 800 meters main drains; ➤ 1.5 km farm roads rehabilitated; Clearing of 140 acres land; Construction of changing room facilities; ➤ Pump house constructed and new pump installed to serve the targeted 290 acres 	<p>458,757 kg (1,009,265 lbs) vegetables, condiments, tubers and cucurbits</p>
<p>4. Meylersfield, Westmoreland</p> <p><i>Expended J\$44.38M</i></p>	<ul style="list-style-type: none"> ➤ 813 m² of road rehabilitated; ➤ 1,290 ft electrical pole lines installed; ➤ Office Facilities to house staff constructed; ➤ Pack house constructed for non-traditional exports and the rehabilitation of a 3,683.8 sq. Ft. Factory (Ackee/ Callaloo canning plant). ➤ Ackee orchard is established 	<p>No production to date. However, two containers of yams have been exported to St. Martin and another container of yams is being prepared for shipment to the Canadian market.</p>
<p>5. Spring Pain, Clarendon</p> <p><i>Expended J\$280.5M</i></p>	<ul style="list-style-type: none"> ➤ 1,800 meters drainage; ➤ 3,400 meters farm roads upgraded and ➤ Clearing of 162 hectares of land. Moreover, installation of irrigation delivery/ interconnectivity system will serve both Spring Plain and Ebony Park Agro-parks. Currently, 105 acres have irrigation infrastructure with another 831 acres being installed. 	<p>237,094kg of vegetables and condiments</p>

Agro-Park	Infrastructural works	Production as at March 27, 2016
6. Yallahs, Thomas <i>Expended J\$110M</i>	<ul style="list-style-type: none"> ➤ 11,000 meters of farm access ways and ➤ 5,000 meters of rehabilitated water channel ways. 	241,142.7kg of onion and 54,189kg of vegetables and condiments
7. New Forest/Duff House, Manchester, Elizabeth <i>Expended J\$69.9M</i>	<ul style="list-style-type: none"> ➤ 2,300 meters upgraded waterways and ➤ 8,000 meters improved farm access ways. ➤ Contract has been awarded to construct a packing facility. ➤ In addition, funding from JSIF will assist in the procurement and installation of one of the two pumps needed to improve water supply to the Park. 	718,014kg of vegetables and condiments
8. Hill Run, Catherine <i>Budget of J\$30.3M</i>	<ul style="list-style-type: none"> ➤ Infrastructural Works required an irrigation water conveyance system which has been designed. In addition, the design of a reed bed system is being done. This system will be used to treat effluent from ponds before it is discharged into the environment. 	74,681kg of fish

The Agro-Parks currently provides employment to 1,639 individuals whether as farmers, investors, permanent or temporary employees.

Youth in Agriculture

100 acres of land has been secured in Spring Plain for the Youth in Agriculture mandate of the Ministry. To date, 20 beneficiaries has been selected by the 4-H Clubs and lease contract have been prepared and issued for their signatures.

Principal Focus for 2016/17

In 2016/17, incomplete infrastructural works for existing Parks amounting to will be completed as well as four (4) Agro-Parks will be outfitted in the next three (3) years to achieve GLOBALGAP certification.

Plans are underway to expand the Agro Park Programme including developing a fully operational Agro-Economic Zone and the development plans of additional Agro Parks are far advanced.

A total of 9 properties are being considered for development over the next three years (2016 - 2019) and these are as follows:-

1. Hounslow - St. Elizabeth
2. Unity/Nonsuch - St. Mary
3. Seven Rivers - St. James
4. Sunderland - St James
5. Shettlewood - Hanover
6. Mafoota/ Richmond Hill - St. James
7. Enfield - Westmoreland
8. Spring Ground - St. Elizabeth
9. Spring Garden - Portland

Not all 9 properties are expected to be developed as Agro Parks some will be classified as production zones in which case limited resources will be provided to address some of the constraints restricting production activities on those properties.

To-date, draft Business Plans have been completed for 6 properties, Hounslow, Unity Nonsuch, Seven Rivers, Sunderland, Mafoota/Richmond and Shettlewood. Business plans for Enfield Spring Ground and Spring Garden are being developed.

2.3 Sugar Transformation Programme

In 2006, in response to changes to the European Union Sugar Regime, including a 36 per cent reduction in the price paid for African, Caribbean and Pacific (ACP) sugar entering the EU market, the Government of Jamaica approved a strategy to restructure the sugar cane sector. The revised Jamaica Country Strategy for the Adaptation of the Sugar Industry: 2006 to 2020, approved in 2008, Phase II – *Revised Sugar Area Development Programme (SADP II)* - is currently being implemented by the Ministry of Industry, Commerce, Agriculture & Fisheries through the Sugar Transformation Unit.

The programme entails the implementation of the Revised Sugar Adaptation Strategy Phase II to include (1) the development of a sustainable private sector-led sugar cane industry; (2) strengthening of the economic, social and environmental resilience of Sugar Dependent Areas/communities (SDAs); and (3) creation of an enabling policy environment to allow the sugar cane sector to prosper.

Aim

To modernize and transform the sugar industry enhancing competitiveness in the industry while addressing social needs.

Planned Targets

- Expansion of sugarcane production and replanting supported by the established Cane Expansion Fund

- Sugar Cane Sector Recovery Project
 - Rehabilitation of 80km of cane roads
 - Capacity Building support to Sugar Industry Authority (SIA) and Sugar Industry Research Institution (SIRI)
 - Establishment of a 10 Ha Green Cane Harvesting demonstration plot development of at least three trash management options

- SDA Development Programme
 - Social Infrastructure Projects in SDA – J\$120 M
 - At least 1,800 persons trained and certified under an established training fund of \$370 M
 - Establishment/Improvement of 40 small enterprises in SDAs by beneficiaries of the Training Fund

Achievements

In 2015/16, the Ministry expended approximately **J\$2B** to carry-out the following activities:

Main Activities	Achievements
1. Rehabilitated Cane Roads in Sugar Dependent Areas	73.83 km
2. Relocation of families from Sugar Barracks to new modern houses	84 of the 350 families resettled in Westmoreland and Trelawny. The other 315 houses were substantially completed in Springfield, Hampton Court and Stokes Hall in St. Thomas.
3. Certification of persons in SDA and registration of new businesses	1,157 persons are certified in vocational areas and under forty-one (41) new businesses have been registered under a Training and Investment Fund for persons in sugarcane parishes amounting to J\$250 M
4. Establishment of demonstration plots of green cane harvesting	Sugarcane was harvested using the Green Cane Harvesting methodology for 10.1 Hectares using three trash management options namely; off barring and moulding, grab loading and raking and Hay baling were the trash management options employed.

Principal Focus for 2016/17

In 2016/17, the Ministry expects to expend over J\$2.38 Billion for the following major activities under the Programme:

- Expansion of sugarcane production through the replanting of 1,400 Ha of lands and installation of 300 Ha of drip irrigation systems facilitated by the established Cane Expansion Fund
- Sugar Cane Sector Recovery Project
 - Rehabilitation of 80km of cane roads
 - Capacity Building support to Sugar Industry Authority (SIA) and Sugar Industry Research Institution (SIRI) in accordance to the recommendations from Wint Commission
 - Establishment of at least 300 Ha Green Cane Harvesting demonstration plot with at least three trash management options
- SDA Development Programme
 - Min 80 Social Infrastructure Projects in SDA (over J\$400M)
 - At least 600 persons trained and certified under an established training fund
 - Establishment/Improvement of 80 small enterprises in SDAs by beneficiaries of the Training Fund

2.4 Food Health & Food Safety

Food safety is an issue of growing importance due to several world-wide trends that contribute to increasing safety risks in food systems, such as the growing movement of people across borders; increased movement of agricultural and food products across borders; rapid urbanization; changes in food processing and handling practices; and the re-emergence/emergence of critical diseases, pathogens, toxins and other issues. Against this background, focus is being placed on the ability of all stakeholders in the food chain to be able to demonstrate adequate traceability of all food sources. Issues relating to food safety will therefore impact on agricultural production, agro-processing, food service industry, trade and commerce, public health and overall economic development.

Laboratory Accreditation

The Veterinary Services Division's laboratory support system is a critical component of the operation of the National Food Safety System. However, for international acceptance of food safety controls that are implemented, the laboratory must be duly accredited based on ISO 17025 standards.

Planned Target

Application to Jamaica National Accreditation Agency for Laboratory accreditation submitted

Achievements

The Veterinary Services Division has on December 22, 2015, applied to the Jamaica National Accreditation Agency (JANAAC) for acquisition of Laboratory Accreditation and awaits a pre-assessment in June 2016.

Principal Focus for 2016/17

In 2016/17, the Ministry will acquire an Organization for Standardization (ISO)/ International Electro-Technical Commission (IEC) Laboratory Accreditation for its Veterinary Diagnostic Laboratory which will focus on microbiology, parasitological and residue and biochemical analysis. In addition, to its role in food safety, it will be a major tool used in the lowering of barriers to trade in the European Union and other international markets.

National Animal Identification Traceability System

This system is part of the Ministry's aim to promote the development and implementation of a strategic planning framework for the Food Safety in Jamaica in order to enhance, strengthen and harmonize the existing local food safety standards for livestock production, consumption and trade in quality meats. The National Animal Identification System (NAITS) is geared towards the following:

- Establishment of AIT regulations, thereby making the identification of cattle mandatory;
- Provision of traceability of bovine animals from farm to slaughter;
- Identification and registration of bovine animals and establishments;
- Establishment of a central register;
- Establishment and maintenance of a computerized data base for cattle;
- Establishment of Movement Documents for farm animals.

Planned Target

- Update regulations to facilitate system

Achievements

- Regulations to facilitate National Animal Identification System have recently been promulgated (December 21, 2015).
- Tagging of all cattle on Government of Jamaica farms/holdings completed.
- Approximately 1800 heads of cattle have already been tagged.

Principal Focus for 2016/17

- Full roll-out of the National Identification and Traceability System for Cattle
- 8000 cattle tagged

Food Safety Modernization Programme

The continued access of Jamaican Foods to the United States, European Union and other markets, requires compliance with the new Food Safety Modernization Act (FSMA, 2011) and other international food safety protocols. To this end the Ministry in 2011 embarked on a project aimed at improving the capacity of farmers and fresh produce exporters in being able to export to the USA, Jamaica's leading market.

Aim

To ensure compliance of local exporters and farmers with the Food Safety Modernization (FSMA) Act and any other international food safety requirement

Achievements

- 100 poultry record keeping handbooks developed. 50 distributed to farmers and other stakeholders
- One Jamaica Good Manufacturing Practices and one Livestock Good Agricultural Practices Handbook completed
- Yam and Hot Pepper GAPS Handbooks completed
- Food Safety Plan completed
- 5 regional Apiculture Food Safety training sessions conducted with 192 participants across the island

Principal Focus for 2016/17

- Capacity building to meet FSMA, GLOBALGAP and other related requirements
- Strengthen the traceability systems for farmers and exporters to fulfil international requirements
- Provision of technical and financial assistance amounting to J\$2M to farmers and fresh produce exporters to upgrade farms and facilities
- Implement a Public Education Programme

GLOBALGAP Certification Programme

In the Ministry's continuous bid to ensure food safety and increase market access to our farmers, the Ministry has developed a GLOBALGAP Certification Programme parallel to its Food Safety Modernization Programme. The Ministry's Agricultural Competiveness Programme is currently pursuing activities to acquire GLOBALGAP certification for four (4) of its Agro-Parks.

Aim:

The overall aim of this project is to operate more efficient and integrated Agro Parks by implementing the GlobalGAP Standard (Globally acceptable on Farm Food Safety Management System) that will ensure that the Agro Parks complies with international sanitary, phytosanitary and food safety standards for the production of plant based foods for the domestic and export markets. The implementation of the project began in January 2016 and will conclude in December 2016 with the Agro Parks achieving GlobalGAP Certification.

Planned Targets:

- The project will cover the implementation of GlobalGAP requirements for the Propagation Material, Machinery and Equipment, Crop Protection, Harvesting as well as Harvested Crop Handling and Food Safety Infrastructure in four Agro Parks namely;
 - ✓ New Forest /Duff House
 - ✓ Plantain Garden River (PGR)
 - ✓ Ebony Park/ Spring Plain
 - ✓ Yallahs
- A maximum of 50 farmers will be selected from each Agro Park to participate in the certification process.
- The project will train all stakeholders in:

1. Quality Management System (9001) Internal
 - 2. HACCP Training/ Understanding ISO 22000
 - 3. Plant protection, fertilizer and IPM (Per Crop under the scope)
4. Food Hygiene/Food Safety Training
5. GlobalGAP Awareness
 - 6. Documentation and Process
 - 7. First Aid /CPR Training
 - 8. Global GAP Auditor Experience
 - 9. Train the trainer training in Food Safety Management Systems

Achievements

- Project Implementation guide document developed
- Hiring of GlobalGAP compliance manager and Implementing Officers
- Identification of Global GAP Consultants, Certification Body and Training Institutions
- GlobalGAP Committees developed in each park
- Site Visits and Risk assessment completed
- Databased developed to input farmer information and is being populated
- Documented procedures and policies are in their draft phase
- Approximately 135 farmers signed their commitment statement for GlobalGAP certification
- Initial site mapping for food safety infrastructure done for each agro park
- GlobalGAP Consultants (Farm Assurers) has made two visit to Jamaica for:
 1. Reconnaissance visit
 2. First Farm Assurer Tour
- QMS Training for members of the GlobalGAP Committees and ACP Team (32 persons)
- Food Hygiene First aid training conducted in PGR and Yallas
- GlobalGAP awareness sessions held in all Agro Parks
- Farmer profile complied for all farmers who signed up to be apart of the certification programme
- Partnership formed between JSIF and ACP for infrastructure development and certification training
- Member participation has increased since the inception of the GlobalGAP programme

Principal Focus for 2016/17

- To train all farmers in food hygiene, first aid, documentation, procedures and policies.
- Identify all training that have been conducted and assist farmers to prepare CVs
- Identify and implement the best design and cost effective food safety infrastructure to be built in the parks
- Acquisition of lands to placing of food safety infrastructure
- Develop maintenance plans for food safety infrastructure implemented
- Meet with key stakeholders and discuss all planned activities and their involvement in the process

- Identify ways to provide potable water to each farmer
- Conduct GlobalGAP Version 5 with key stakeholders
- Develop traceability system applicable to GG standards
- Procure appropriate harvesting equipment suitable for crops being certified
- Identify and Develop proper waste management system specifically for vegetable domestic and chemical waste
- Identify markets for GlobalGAP certified produce
- Licensed training for commercial sprayer application in all Agro Parks
- Print and distribute record keeping books and SOP manuals to Agro Parks
- Identify additional staff for implementation process of GlobalGAP
- Conduct 28 internal inspection prior to certification audits in Agro Parks
- Populate database with grower information for certification
- Develop Public Relations campaign for GG programme
- Licensed training for food handlers certification

Praedial Larceny Prevention Coordination Programme

In response to the scourge of Praedial larceny and other farm theft, the then Ministry of Agriculture and Fisheries in collaboration with the Ministry of National Security established a Praedial Larceny Prevention Coordination Unit on March 2nd, 2015. The Unit comprises of an administrative arm from the Ministry of Industry, Commerce Agriculture and Fisheries and operational arm from the Jamaica Constabulary Force.

Aim

- To enhance the legislative framework for Praedial larceny prevention and risk reduction by correcting the inappropriateness of penalties for Praedial larceny under the law and to increase the rate at which these cases are executed in the Courts.
- To establish strategic partnerships for the development and implementation of a National Plan of Action to address Praedial larceny prevention.
- To create an enabling environment for the traceability of agricultural produce.
- To achieve a sustainable reduction in Praedial larceny and other farm theft through the conduction of police operations.
- To increase the participation of farming and fisher communities in Praedial larceny prevention and risk reduction.

Planned Targets

- Review legislations dealing with produce and trade - Agricultural Produce Act and Praedial Larceny Act
- Implement a Public Campaign on traceability and Praedial larceny prevention
- Increase number of police operations regarding Praedial larceny and farm theft
- Strengthen interagency collaboration among key players that deal with Praedial larceny

Achievements

- ***Interagency Collaboration***

The Unit has employed a participatory approach to tackle the scourge of Praedial larceny. A National Praedial Larceny Prevention Committee was established comprising of key stakeholders including farmers to strengthen the strategic actions in the national interest to reduce Praedial larceny incidences. Through partnerships with the Office of the Chief Justice and the Jamaica Constabulary Force, police officers as well as members of the Judiciary has been sensitized and trained to treat with Praedial larceny cases.

- ***Enforcement and Compliance***

Through planned operations and collaboration with the Jamaica Constabulary Force and the Public Health Department, a 14% reduction has been achieved in Praedial larceny reports. Additionally, 213 stolen animals have been recovered by the Praedial Larceny Prevention Coordination Unit.

- ***Public Education Campaign***

Praedial Larceny Prevention Campaign was planned and executed. The campaign consisted of the sensitization of farmers, butchers, police, judges, clerks of the court and the Jamaican public in general. Parish seminars, farmers meeting, radio and television interviews were conducted.

Principal Focus for 2016/17

The Unit's focuses for the financial year 2016/ 2017 are legislative amendments, enforcement and compliance, institutional arrangement and public education to facilitate a sustainable reduction in incidences of farm theft.

- **Enforcement and Compliance**

Through collaboration with the Jamaica Constabulary Force and the Public Health Department, the Unit will be conducting a series of intelligence led police operation across the island to combat the scourge of Praedial larceny. These include:

- On-going joint operations with Public Health Inspectors who inspect abattoirs, meat shops and other wholesalers/retailers of farm produce to ensure compliance.
- Regular patrols of farming districts and increase police presence in areas where Praedial larceny is prevalent.
- Regular stop and search of vehicles transporting agricultural produce to identify and prosecute breaches of the Praedial Larceny (Prevention) Act and ensuring receipts for agricultural produce are examined for legitimacy of purchase.
- Continuous monitoring of fishing activities in the coastal waters in conjunction with other partner agencies to ensure activities are being carried out in accordance with the Fishing Industry Act and all other relevant legislations and regulations.

▪ **Legislative Amendments**

In an effort to bolster the legislative framework to provide greater penalties as a strong deterrent to the practice of Praedial larceny, proposed amendments have been made to the **Agricultural Produce Act** and the **Larceny Act**.

- **The Agricultural Produce Act-** the Amendment of the Agricultural Produce Act will result in greater penalties and increased fines from \$250,000 up to \$3 Million Jamaica Dollars. The proposed amendments also seek to simplify the licensing regime and the registration requirements to include other players (higglers, middlemen and transport operators) in the value chain.
- **The Larceny Act-** the Act is being amended to redefine Praedial larceny to include livestock and crops as well as the compensation of farmers.

▪ **Capacity Building**

In collaboration with the Office of the Chief Justice, the Ministry of National Security the Unit will embark on the following:

- Sensitization and training of Clerks of the Court and Parish Court Judges in the adjudication of Praedial larceny cases.
- Sensitization and training of all members of the Jamaica Constabulary Force and Recruits on Praedial larceny related issues.
- Develop a Prosecutor's Manual/ Tool Kit for the Clerks and Deputy Clerks of the Courts in the prosecution of Praedial larceny cases and other related areas.

▪ **Public Education**

- Sensitization of farmers, butchers and end users on the National Praedial Larceny Strategy through community meetings, parish seminars, agricultural shows, farm visits, radio and television interviews as well as the print media.
- Praedial Larceny Essay Competition to sensitize youths and the Jamaican public of the impact of Praedial larceny on the agricultural sector.

2.5 Food Security Initiatives

The need for food security has emerged as a national priority, as global economic and environmental forces combine to threaten food supply and prices. In an effort to boost national agricultural production, the Ministry of Industry, Commerce, Agriculture & Fisheries has been promoting the “***Eat What We Grow ...Grow What We Eat***” concept to encourage consumers to support more locally grown foods and farmers to produce more of what we consume. It is important to note that Jamaica spends just under US \$1 Billion each year on food importation. In this regard, the Ministry has made a deliberate effort to increase production of certain crops.

Despite the extensive drought, the Ministry continues to provide consistent technical support and research in improving the productivity and production of these agricultural crops and livestock.

The Ministry has made significant strides in increasing the production and productivity of these select agricultural produce and as such increasing the market access of our farmers:

Sweet Potato Industry Plan

The Sweet Potato Industry Plan was born out of the need to establish a sustainable sweet potato industry to take advantage of the increasing demand for sweet potatoes especially the United States orange flesh sweet potato varieties. The demand for potatoes is primarily driven by Europe and Canada with the UK being the main market. In the United Kingdom the ACP Programme have created market linkages with the Fresh Produce Consortium in the United Kingdom to purchase this potato from Jamaica through the Ministry's Agricultural Competiveness Programme. The Fresh Produce Consortium is the largest association of purchasers in the United Kingdom market. The UK market purchased 180m pounds of sweet potato in 2014.

Aim

To improve the livelihood of farmers growing these varieties of potato; and to export large volumes of local and orange flesh sweet potato thereby contributing to GDP through foreign exchange earnings.

Planned Targets

- Provision of disease-free and resilient planting material for two orange flesh varieties, Beauregard and Covington, for export under the Ministry's Research & Development *Clean Seed Programme*
- 50 acres of Beauregard variety planted
- Attain an average yield of 20000 pounds per acre
- Building capacity for farmers
- Improving the livelihood of farmers growing these varieties of potato

Achievements

- Distributed 96 acres of Beauregard sweet potato slips
- 93 acres of Bureaugard have been planted
- 39 farmers from eight (8) Parishes².
- Potatoes planted in Aqualta Vale St. Mary by the Jamaica Producers Group held an average yield of over 30 tonnes per hectares.
- 89 farmers trained in GAP

Way Forward

In 2016/17, it is expected that 200 acres will be planted with 2,000 - 3,000 tonnes to be harvested for export.

² Hanover, St. James, Clarendon, St. Catherine, St. Mary, St. Thomas, Manchester, St. Elizabeth.

Basa Production or Aquaculture Species Diversification Programme

As part of Government's thrust towards import substitution, increasing foreign exchange earnings and to ensure food security, *Pangasius hypophthalmus* was chosen to facilitate the diversification of the aquaculture sub-sector. *Pangasius* had several attributes that made it a desirable. Basa is a fast growing species which is tolerant of low oxygen conditions. The intention was to introduce it to the local market and eventually the export market as a filet or steak product. This strategy was supported by several local players who were already involved the production or processing of Basa.

Aim

The aim of the aquaculture species diversification programme is to understand the production methodologies (spawning, husbandry, feed requirements and growth rates) for *Pangasius hypophthalmus* (Basa).

Planned Targets

- Development of a hatchery protocol for the production of *Pangasius* seed stock
- Conduct feed trials for *Pangasius hypophthalmus*
- Provision of alternative income generating activity for persons from rural communities

Achievements

- Three successful trials in the spawning of *Pangasius*
- Approximately 572 fingerlings were stocked and undergoing feed trials
- Feed trials were conducted with these fish using the local tilapia ration. The trials are still ongoing.

Principal Focus for 2016/17

- Continue striving to achieve at least a 50% larval survival rate
- Continue feed trials and growth rate studies
- Determine production methodology for *Pangasius* under local conditions
- Conduct production trials with interested fish farmers

Onion Development Plan

Onion is of economic importance in Jamaica. This condiment is required in the fresh market as well as the agro- industry. Approximately 10 million kg of onion are consumed in Jamaica annually. The Onion Production Programme is geared towards facilitating the sustainable development of the onion sub-sector, thereby reducing permanent dependency on imports, and achieving self-sufficiency in onion production.

The implementation of the Onion Development Plan will promote the increase in onion production in suitable production areas and designated agro-economic zones. The programme is managed by a Technical Working Group which comprises of representatives from various Divisions of the Ministry.

The group ensures that participating farmers are trained in the various aspects of onion production. Areas of focus include site selection, land preparation, pest and disease control, crop establishment, plant nutrition, irrigation, post-harvest practices, and marketing. The programme which is funded through a combination of grants, loans and private investments is also supported by buyers who enter into marketing contracts with the farmers.

Aim

To reduce Jamaica's dependency on imports and achieving up to 40% self-sufficiency in onion production by 2020.

Planned Targets

- The establishment of 90 Ha of onions in which 26 ha will be established in select Agro-parks.

Achievements

- 96 ha harvested in 2015, yielding 1,162 tonnes, representing a 71% increase in production when compared to 2013 at the start of the programme.
- Local production of 1, 162 tonnes of onions satisfied 12.3% of demand in 2015, up from 7.3% in 2013.
- Productivity increased from 11.5t/ha in 2013 to 12.1t/ha in 2015
- Over 200 farmers have become engaged.

Principal Focus of 2016/17

- Cultivation of 140 ha of onion in 2016/17
- Productivity of 15t/ha
- Involvement of 250 farmers
- Establishment of marketing contracts and arrangements between farmers and buyers

The Irish Potato Programme

Jamaicans consume some 15 million kg. of table irish Potato on an annual basis. The Irish Potato Programme is geared towards achieving 100% of the national demand by 2015. The Ministry has been instrumental in leading this effort toward 100% import substitution. This initiative requires increased production and improved productivity, along with unified efforts of all key players in the agriculture sector including farmers, buyers, extension personnel and researchers. Access to high quality seeds, provision of high quality extension support, farmers' capacity building through training, use of best crop and pest management practices and market linkages are indispensable factors for the sustainable development of the Irish Potato industry.

Aim

To achieve local self-sufficiency in table irish potato.

Planned Targets

- 40% crop care support per hectare provided in the form of agro-chemicals per farmer.
- 2500 farmers benefitted
- 75 women and youth participating in programme
- four (4) farmer –field Schools (FFS) established
- seven (7) demonstration plots;
- Two (2) farm tours organized
- Marketing agreement/contract between farmers and buyers strengthened

Achievements

- 2790 farmers benefitted
- 962 hectares planted (still planting) of 1200 hectares targeted
- Yielded 12,800 tonnes reaped of 15,000 targeted (yield reduced due to drought)
- 624 women and youth participating in programme
- 1200 hundred farmers were assisted with 40% percent of their chemical requirements
- 8 demonstration plots established

Principal Focus for 2016/17

The Ministry through the Rural Agricultural Development Authority will continue to ensure the local self-sufficiency of tabled Irish potato through effective extension service

Small Ruminants Production

The Ministry through its Research & Development Division is currently in the 6-month extension phase of implementation of a four -year small ruminant production and development project – ***Diversification of the Caribbean Livestock through the Production of Small Ruminants.***

Aim

To improve the production, productivity and quality of small ruminants' meat and the availability of breeding stock in order to enhance the income and food security of small scale mutton and chevron farmers and meat processors in Jamaica. It will build on the local technological capacity in the areas of small ruminant breeding, production and value addition to support the expansion of the small ruminant industry and contribute to the reduction of imports.

Planned Targets

- Expansion of the government nucleus herds with improved genetics and animal husbandry practices;
- The introduction of second tier breeding sites (satellite farms and agriculture training institutions) to support the expansion of local herds, for the provision of improved breeding stock for the production of fatteners for meat production;
- Training of extension, veterinary technicians and farmers in best practices and the creation of value added products such as meat fabrication.

Achievements to date

- 110 farmers benefited to date from animal husbandry training for small ruminants
- Embryo transfer (ET) technology and AI utilized to increase herd expansion.
- Upgrade of small ruminant facilities at Hounslow Demonstration and Training Center and Bodles Research Station as regional training centers in small ruminant husbandry, AI and ET technologies. 12 participants from the region trained to date
- Transfer of small ruminant breeding stock to secondary and tertiary training institutions, Knockalva, Dinthill, Ebony Park and CASE, to enhance training capacity in small ruminant breeding and production of breeding stock to their communities.
- Forage Pellet machine installed at Bodles Research Station. It must be noted that the growth and utilization of fodder are greatly influenced by seasons. So, in order to make full use of forages in dry season forage pellets are made and conserved for feeding in the dry season. The pellets are only around 1/4 of the raw materials in volume and are favourable for storage and transportation.
- Feeds and feeding systems have been expanded at the Hounslow Station to facilitate demonstration of feeding systems to potential farmers.
- Silvopastoral systems established in two areas to support small ruminant herds during the dry season
- Refurbishing of the Bodles abattoir is 90% complete and has facilitated one-training in butchery.

Principal Focus for 2016/17

Projections under extension

- 50 more farmers targeted for training
- Increase in breeding stock distributed by at least 25%
- Expansion of government herd by 75%
- Training of 10 persons in butchery and meat fabrication
- Establishment of small ruminant production and value addition clusters

2.6 Drought Mitigation Response

In 2015, the agricultural sector continued to be impacted by the effects of Climate Change manifested in a severe drought that followed on from 2014. Statistics from the Meteorology Service indicates that the island's cumulative rainfall from January 2015 to May 2015 was 25% below what is normal for this time of the year. These dry conditions have been negatively impacting the island's agriculture sector. It had become imperative that an immediate response programme be implemented to reverse the negative impacts being faced by the sector.

Aim

To build the resilience of farmers to the extensive drought, an impact of climate change.

Planned Targets

- Over 2000 farmers provided with equipment and infrastructure for water storage and efficient distribution of water on farm
- 5000 farmers trained in on-farm water management
- Wells and water harvesting structures rehabilitated in select parishes – Manchester, S. Ann, St. Catherine, Clarendon, and St. Elizabeth.
- Supporting water distribution and irrigation infrastructure provided to farmer's cooperatives and groups.
- 300 farmers benefitted from water trucking; distribution of agri-tech/agro-chemical to increase soil water holding capacity and rehabilitated greenhouses.

Achievements

The Ministry through the Rural Agricultural Development Authority expended a total of **Forty-Five Million, Five Hundred and Three Thousand and Five Jamaican Dollars (J\$45.5M)** to provide assistance to farmers in the form of the following items and/or activities:

- Over 140 water tanks delivered
- 3000 meter of hydrogol hose; 20 pumps and irrigation hose
- 505 irrigation kits
- 48 water meters
- 5,876 fifty pound bags of fertilizer distributed to coffee farmers and banana farmers in St. Catherine, St. Thomas, Portland, St. Mary, and St. James
- 5000 farmers trained in on-farm water management

Approximately 10,500 farmers across all affected parishes benefitted from this initiative.

Principal Focus for 2016/17

The Ministry recognizes the climate change is here and extreme weather patterns such as prolong droughts will become a staple in the agricultural sector. Therefore, in 2016/17, the Ministry through RADA will do the following:

- On- going assessment of water catchments across the Island – RADA will investigate the cost and feasibility of rehabilitating existing water catchments. In addition, the extent to which existing water catchments are properly utilized will be ascertain.
- Promotion of climate smart agriculture – RADA's extension officers have been trained in climate smart techniques and will be imparting this knowledge to all farmers through farmer field schools and farm visits.

2.7 Spice Development Programme

Aim

To increase ginger, turmeric, pimento and nutmeg production by expanding acreages and improving productivity as well as increase operational efficiency and quality assurance procedures of Jamaican spices to capitalize on marketing opportunities.

Planned targets

- 120 ha open field ginger,
- 10 ha shade house ginger establish
- Ratoon 22 ha of Turmeric
- establish 100 ha pimento
- Revised pimento manual
- produce 90,000 pimento seedlings
- produce 40,000 nutmeg seedlings

Achievements

- 23 ha open field ginger established
- 0.16 ha shade house ginger established
- 88 ha of pimento
- 46,000 seedlings pimento produce

2.8 Fisheries Development Programme

The Fisheries Division is responsible for the sustainable development and management of the capture fisheries and aquaculture subsectors. The fisheries sector contributes to direct and indirect employment of over 40,000 persons and contributes to the local economy of many fishing and fish farming communities, and makes an indirect contribution to the livelihoods of over 200,000 persons. Similarly, Fisheries play an important role in local food security, and given the existing resources, have the potential to increase its role in ensuring the availability of nutritious, affordable and accessible source of food.

Aim

To ensure the sustainable management and development of Jamaica's capture fisheries (marine and freshwater) and aquaculture resources.

Achievements

Modernization of Fisheries Sector

The active process to modernize the Fisheries Division commenced in April 2009 with the appointment of its first CEO. The Fisheries Division in its present form is constrained in its ability to leverage the true possibilities of Jamaica's Fishing Industry. A Cabinet Decision (No. 34/15 dated 14 September 2015) became necessary to regularize a governance issue between the new Fisheries Bill and the Executive Agencies Act which resulted in a change of the new entity's category from that of an Executive Agency to a Statutory Body. The transformation and modernization of the Fisheries Division into the National Fisheries Authority (NFA), a Statutory Body, will provide and support new initiatives to resuscitate and expand the work of the Fisheries Division and by extension the Fishing Industry. The Modernization Process has three (3) subsections namely, the Bill, Personnel and Infrastructure.

- i. **Bill** – Passage of the Bill will formally create the National Fisheries Authority (NFA).
- ii. **Personnel**–Twelve (12) posts were already approved under the heading of the National Fisheries Agency. The Draft Modernization Plan of the National Fisheries Authority (NFA) is completed; it is recommending a total number of 342 personnel from the present 153.
- iii. **Infrastructure** - The construction of a new multifaceted seafront facility for the National Fisheries Authority (NFA) Corporate Office. Our Ministry has been in dialogue with the Port Authority of Jamaica for over a year regarding their Old Sardine Factory property at Marcus Garvey Drive. They have agreed in principle to lease the property to our Ministry for the construction of the Fisheries Division/NFA Corporate Office; awaiting commencement of negotiation. Requested and received \$5 million from Ministry of Finance and Public Service to undertake the Engineering Drawings for the new buildings.

Capture Fisheries Initiatives

▪ **Amendment to the Fishing Industry Act**

One of the major achievements for the 2015/16 period was the amendment of The Fishing Industry Act in October 2015. This amendment addressed some major deficiencies in the Act such as allowing for the forfeiture of the catch to the Crown and updating the definitions of fisheries activities in line with international standards. But more importantly, the amendment significantly increased the fines from a maximum of J\$5,000 under the old Act to a maximum J\$3 M in the Parish Courts. Furthermore, the Act now allows for two (2) jurisdictions to try cases: The Parish Court and the Supreme Court. Serious breaches by Large Companies and foreign poachers can now be brought before the Supreme Court where there are no maximum fines and the Court in the appropriate circumstances can impose fines far in excess of J\$3 M that will act as a true deterrent to unscrupulous persons destroying the livelihood of the fishers of this country.

▪ **Diversification of Capture Fisheries Resources**

In keeping with National Fisheries and Aquaculture Policy, to diversify our capture fisheries additional funding was sourced from the UN FAO to the tune of USD \$289,000 to beef up the USD \$60,000 from the Fisheries Management and Development Fund to assess the sea cucumber population and explore the potential to culture them in Jamaica. The project suffered extended delays due to the FAO experiencing difficulties in identifying a suitable consultant. These issues are now resolved and the project is now poised to take off with the technical team from the Fisheries Division assessing the stock status on the Island Shelf of mainland Jamaica from June to October and shortly thereafter the assessment of the Pedro Bank stocks will commence.

▪ **Protection of Fish Stocks and Critical Marine Habitats**

All the relevant work (such as stakeholder's acceptance, identification of boundaries, etc.) has been completed to enable the designation of 3 additional Special Fishery Conservation Areas (also called Fish Sanctuaries) which will make the total number of these special type of marine protected areas to 17. One (1) of the new protected areas will be in Portland managed by the Alligator Head Foundation in collaboration with the University of the West Indies. The other two (2) will be immediately adjacent to the eastern and western boundaries of the existing

Special Fishery Conservation Area in Boscobel and each will be alternately opened for fishing for six (6) and three (3) months periods each year. These unique “rotating” protected areas were the brain child of the fishers from the Boscobel area, demonstrating not only innovation but true commitment.

- **A National Adaptation Strategy and Action Plan and a Vulnerability and Capacity Assessment of thirteen fishing and aquaculture communities in Jamaica** were developed with assistance from the Caribbean Community Climate Change Centre. The project developed a strategic action plan and assessed the vulnerability of fishing and aquaculture communities to the anticipated impacts of climate change.
- Capacity building activities have been conducted with nine fisher groups; of this number eight are active and functional.

Aquaculture Initiatives

- **Diversification of Fish Species for Food Production**

In keeping with the draft National Fisheries and Aquaculture Policy to facilitate diversification of food fish production in Jamaica to among other things safe guard the industry against any unforeseen problems related to any one species such as decrease demand and disease as well as facilitating import substitution Jamaica has chosen to explore the potential of culturing Pangasius (also called Basa) which is a hardier species than tilapia. Through a partnership arrangement with the Food for the Poor which involved capacity building and enhancement of hatchery infrastructure and the donation of critical equipment, the Aquaculture Branch was successful in spawning Basa. This achievement has further enhanced our efforts while we continue to fine tune hatchery management systems to achieve a minimum survival rate of 50% of Basa larvae. We also continue to conduct trials to understand the feed regime, growth rates and husbandry practices.

- **Enhancement of Tilapia Seed Stock Production**

Through funding provided by the FMDF (approximately J\$38 M) brood ponds and nurse ponds have been rehabilitated. The hatchery infrastructure has been enhanced and critical equipment acquired to facilitate delivery of seed stock to fish farmers. These developments will enhance the Aquaculture Branch’s capability to produce increased quantity of seed stock (i.e., advanced fries (approximately 1 gram) and fingerlings (10 g and greater)) to facilitate increased production of tilapia. This project is on-going and upon its completion by the end of this financial year will be able to increase tilapia seed stock from the current annual of rate of 1.5 million to 3 million.

Principal Focus for 2016/2017

The major projects/programmes for 2016/17 will focus on the following:

- **Modernization**
 - Facilitating the passage of the new Fisheries Bill, 2016.

- Facilitating the completion of the Lease Arrangement for new the Fisheries Division/NFA Corporate Office at the Old Sardine Factory. Pursuant to such, focus on architectural drawings and sourcing of funds externally to commence construction.
 - Completing all 146 Job Descriptions for National Fisheries Authority (NFA).
 - Filling at least five (5) of the twelve (12) NFA posts which were already approved under the heading of the National Fisheries Agency.
-
- **Developing underutilized and un-utilized species.**

Species falling into this category are marine and land crabs, sea cucumbers, glass eels and pelagics (e.g., tunas, dolphinfish, kingfish, etc.) The strategic objective is to increase employment opportunities especially for artisanal fishers, increase foreign exchange earnings and productivity. The development of these fisheries will also serve to diversify the sector and reduce the unsustainable fishing pressure on traditional reef and reef associated fisheries.
 - **Combating illegal, unreported and unregulated (IUU) fishing activities.**

The low level of compliance has undermined fisheries management efforts and worsened the significant decline in catches. Illegal fishing for conch, lobsters and other species (e.g., sea cucumbers) especially by foreigners is particularly worrying. Conservative estimates of the loss to illegal fishing by foreigners are at least US\$10 M annually. The recent amendment to the Fishing Industry Act which significantly increases the fines under the Act is expected to greatly enhance compliance.
 - **Enhance management of spiny lobster fishery.**

This will be achieved through among other things, assessing the status of the spiny lobster population. This is critical to determine the current status of the spiny lobster population in order to properly manage the fishery to safe guard employment for the lobster fishers as well as the foreign exchange earnings and foreign exchange savings (significant quantities of lobsters are sold to the hospitality sector).
 - **Increase resilience of selected fishing and aquaculture communities to climate change.**

This will be achieved through the International Bank for Reconstruction and Development funded project valued at USD \$5 M over five (5) years. One of the key components of the project is the identification and development of alternative livelihood options for stakeholders in the selected fishing and aquaculture communities. The Project Preparation Grant (PPG) of USD \$125,000 will be used in the 2016/17 F.Y. to prepare the project appraisal document that will detail all the component of the project to be implemented in the 2017/18 F.Y.
 - **Protection of fish stocks and critical marine habitats** (e.g., mangrove. Seagrass and coral reefs, etc.).

This will be accomplished through the continued maintenance of existing marine protected areas (i.e., Special Fishery Conservation Areas (SFCAs) (also called Fish

Sanctuaries) and the establishment of new ones. SFCAs are sine qua non in order to give the severely depleted fisheries resources a change to recover. There are currently 14 SFCAs managed by 9 NGO partners. With the additional three (3) SFCAs established (see above) there will be a total of 17 SFCAs managed by 10 NGO partners. Seven (7) NGO partners receive a Subvention of approximately **\$40.6 M** annually to manage 9 SFCAs. The identification and establishment of at least two (2) additional SFACs is targeted for 2016/17.

2.9 Research and Development Initiatives

The Research and Development Programme is an integrated element of the wider developmental process that supplies improved and scientifically validated technologies to farmers to address production constraints and hence improve productivity, efficiency and sustainability of smallholder agriculture. The Ministry's Research and Development programme supports the following initiatives:

Clean Seed Systems

To better harness the potential of local crops for food and nutrition security and value addition in the face of changing climates, efficient clean seed multiplication and delivery systems are under development for root and tuber crops.

A total of 1,783,100 sweet potato slips harvested which was used to establish 37 ha (93.5 acres) of sweet potato on farms in the Agro Parks including Ebony Park (Clarendon) and Amity Hall (St. Catherine) and private entities including Jamaica Producers (JP) in St. Mary. JP has reported 50% increase in sweet potato yields for the Beauregard variety compared to the national average for local varieties. Tissue culture material of two local sweet potato varieties "Yellow Belly" and "Uplifter" have been sent to North Carolina State University through the US Department of Agriculture for cleaning up

Key intervention areas will include

- i) Screening appropriate cassava, irish potato, sweet potato varieties for adaptation locally to pest and disease pressure, and the expression of desirable traits for improved yields, stress adaptability and potential for value addition
- ii) Developing protocols and guidelines for high throughput production of quality planting materials for sweet potato, cassava and ginger,
- iii) Designing and testing potential models for quality seed multiplication, including seed certification for sweet potato and ginger, delivery and initiate their institutionalization with other key stakeholders, and
- iv) Promoting proven technologies and practices for enhanced semi-intensive production of cassava and sweet potato in relevant agro-ecologies of Jamaica by small farmers.

The key intervention areas will be achieved through screening germplasm under natural field conditions, developing high throughput seed delivery system, and participatory evaluation, packaging and promotion of technologies

This activity includes to date citrus, ginger and sweet potato. This activity pre-screens valuable plant selections for diseases that can be spread by contaminated planting material stock and be difficult and costly to control. It provides clean pathogen tested planting material for nursery stock production for citrus under the citrus certification programme and in the past year has included the Beauregard sweet potato recently introduced from North Carolina State University and Louisiana State University in the US as foundation and registered material.

Funding support agencies and Collaborators include IICA, PROPEL WUSC, JSIF, Red Stripe, Jamaica Producers, Irish potato seed importers, Newport Fersan, Source Farm Foundation, UWI

Evaluation and release of improved crop germplasm

In ensuring that a sustainable agriculture based industries are developed it is of critical importance that new varieties with suitable characteristics are identified and introduced locally before being made available to the industry.

Achievements

Tomato

Collaboration with AMSA Seed Company: The on-going partnership with St. Jago Farm Supplies and AMSA Seed Company in California continued in 2015. The goal is to evaluate and screen tomato lines for tolerance to the Tomato Yellow Leaf Curl Virus (TYLCV) a debilitating disease of local tomato production that can result in yield loss > 30%. A total of 710 tomato lines were evaluated for tolerance to the disease and promising lines identified for further testing

Onions

Another in a series of onion evaluation trials was established during this period to include the varieties 07-28-11, 106-28-874, Mata Hari, Sweet Caroline and Serengeti. This trial was done in collaboration with Carib Agro Distributors. Sweet Caroline, Mata Hari, 106-28-874 varieties identified as promising short day varieties in terms of potential yield

Cassava

Through partnerships with CLAYUCA Colombia four high yielding cassava varieties have been identified with desirable traits for value addition and are currently under evaluation on commercial farmers' holdings

Trials are to be conducted with Red Stripe and Jamaica Producers re the performance and suitability of this types for their production systems

Sweet potato

Postharvest analysis studies have identified sweet potato varieties with desirable value added traits that will further be evaluated for drought tolerance

Irish potato

First set of variety trials for irish potato varieties for processing for chips and fries completed. Trial to be repeated in Manchester and Guys Hill areas

Biodiesel Project

The Research and Development Division collaborated with the Centre of Excellence for Renewable Energy, Petroleum Corporation of Jamaica (PCJ) in establishing trial plots of Castor Bean and Jatropha which have shown promise in other countries as good feedstock for biodiesel. Two successful trials were established during the period which resulted in the documentation of agronomic practices involved in Castor Bean and Jatropha production. PCJ has obtained a total castor bean yield of 1695kg (3730 lbs) from the two trials. This produced an oil yield of 40.4% which is comparable to the international standard of 45%. Phase two of the collaboration will involve testing of the fuel on-farm vehicles.

Beet Army Worm Management Project

FAO TCP project on beet armyworm implemented along with several key stakeholder including RADA ACIDIVOCA and scallion and onion farmers was completed. Systems in place in St. Elizabeth to monitor and forecast beet armyworm outbreaks to facilitate timely intervention. Isomate pheromone trials being implemented by Research and Development Division currently underway to disrupt mating behavior of the pest thus reducing the impact of the pest on scallion and onion production. The trial covers an area of 25 acres.

The use of Embryo Transfer (ET) Technology for Rapid Multiplication of Superior Germplasm

By natural breeding, only a fraction of the reproductive potential of an outstanding individual can be realized. The average herd bull will sire 15 to 50 calves per year and the average cow will have one calf per year. With artificial insemination, it is possible to exploit the vast numbers of sperm produced by a genetically superior bull, however the reproductive potential of the female has been largely unutilized. She will produce an average of eight to 10 calves in her entire lifetime under normal management programs. Like artificial insemination has done for the bull, embryo transfer is a technique that can greatly increase the number of offspring that a genetically important cow can produce. The outcome will be the ease of sale of genetics of superior animals to the region and the rapid expansion of herds with low population numbers to support the expansion of the cattle industry. Research is ongoing in this area

Achievements to date

ET has been employed with the Jamaica Hope and Jamaica Black cattle breeds. A total of five trials of Embryo Transfer Implants have been completed. A total of twenty-six (26) embryos harvested, nine (9) embryos implanted and ten (10) grade 1 Jamaica Black embryos stored. ET technology was used to rescue a Jamaica hope line from being lost.

2.10 Rationalization of select Commodity Boards and Export Division Programme

Arising from the Government's Policy to minimize its role in commercial activities, including the processing and marketing of agricultural products, Cabinet by its Decision 28/14 dated July 28, 2014, gave approval for the rationalization of three Agricultural Commodity Boards, namely: The Coffee Industry Board, The Cocoa Industry Board, the Coconut Industry Board, plus the Export Division of the then Ministry of Agriculture & Fisheries. Furthermore, this Project was endorsed by the Government in conjunction with the International Monetary Fund (IMF) as being one which would further the cause of Public Sector Modernization and Transformation.

The Ministry was mandated to divest the Commercial Assets of these entities and to fuse their respective Regulatory Functions into a single Regulatory Body to be nomenclated: The Jamaica Agricultural Commodities Regulatory Authority (JACRA). This body would regulate quality standards, certify products for both local and export markets, regulate local and export trading in these products, issue licences and permits to facilitate trading, as well as finance its operations from the fees collected from Importers and Exporters of the products, in the form of licences, cess, and services rendered by the Body.

It was further agreed by Cabinet that the new entity should be established as a **Statutory** Body.

Achievements

a) Organizational

- Recommended and received approval of a Pay Plan for the new staff positions from the Ministry of Finance & the Public Service.
- Recommended a Pension Plan, Group Life and Group Health Insurance for the new staff
- Proposed transitional arrangements for the progression of staff, assets and liabilities from the existing entities to the new body (JACRA), when it is established.
- Initiated change management interventions within the Entities
- Identified suitable accommodation, facilities for the New Body
- Addressed plans for the Financial Sustainability of the New Body

b) Legal Framework

- Issued Legal Drafting Instructions to the Office of the Chief Parliamentary Counsel for the Drafting of a JACRA Bill in order to give the new Body an appropriate Legal Status.
- Commenced the Drafting Instructions regarding the development of the Regulations to give effect to the JACRA Act when it is promulgated.

Principal Focus for 2016/2017

- JACRA Act passed and the attendant Regulations to the Act completed
- To finalize Employee's Pension, Group Life and Health Plans
- To complete the process of staff, and assets transitioning and to develop recruitment procedures for new staff
- To finalize arrangements for office facilities

- To assure the Financial Sustainability of JACRA by the institution of a viable, Licencing, Cess, and cost Recovery regime.
- To initiate a Public Relations Programme to give effect to Public Awareness of the New Body, both local and overseas.

2.11 GOJ/Adaptation Fund Programme (Component 2)

Enhancing the Resilience of the Agriculture Sector and Coastal Areas To Improve Livelihoods And Increase Food Security

This project is a GOJ/Adaptation Fund that will assist in building Jamaica's adaptive capacity in accordance with the objectives of Vision 2030 Jamaica National Development Plan and Jamaica's Second National Communication on Climate Change. The project will involve water harvesting and management; erosion and flood control and techniques which improve soil moisture retention. In addition, capacity building interventions will be undertaken to complement the establishment of these infrastructures and will involve training of communities in disaster risk management, natural resource management techniques and climate change adaptation.

Aim

To increase livelihoods security of the population in the targeted communities and to increase the overall climate resilience of the agricultural sector.

Objectives:

1. To improve the irrigation water supply infrastructure in the identified communities, with construction/rehabilitation of small scale irrigation systems.
2. To provide a more consistent supply of irrigation water that will allow for year round production of crops grown by the small farmers in all targeted communities
3. To promote rainwater harvesting as a means of increasing crop production both in terms of volume and variety of vegetables, condiments and root crops
4. To ultimately improve the quality of life (through increased earnings) for farm-families, as farmers will be engaged in year round crop production, instead of being limited to the rainy periods.
5. To mitigate and adapt to climate change impacts through the implementation of best practices and promotion of climate smart agriculture and proper water and land management.
6. Reduction in the cost of crop production

Major Activities

- Implement Rainwater harvesting infrastructure
- Provide small grants to small farmers to establish land husbandry infrastructure on their holdings
- Provides small grant to small farmers to assist in the production of ornamental horticultural crops such as onions and Irish potato

Achievements

- 7 Water harvesting infrastructure established
- 8 Irrigation and Production Schemes (IPS) established assisting farmers with on-farm drip irrigation systems

- Supporting under 2500 farmers in the production and productivity grants assisted in the establishment of
 - 37.97 hectares of onion (onion development programme)
 - 866.98 hectares of Irish potato (Irish potato programme)
 - These interventions yielded 7,645.06 MT of produce generating farm income of J\$0.9 B
- 80 land husbandry infrastructure projects implemented
- 16 Water Users Groups (farmers Groups) mobilized - six of which were formalised into legal entities to facilitate sustainability

Principal Focus for 2016/17

- Continued implementation of water harvesting infrastructure and IPS
- Construction of on-farm land husbandry infrastructure
- Establishment of land husbandry Farmer Field Schools (FFS)
- Implement capacity building programmes for farmers and technical officers through the social and technical interventions

2.12 Agricultural Competiveness Programme

The Agricultural Competiveness Programme is an IDB/GOJ project that focuses on facilitating the linkage of the primary productive sector with the marketing chain with the view of generating value added through market access and export promotion through three main components; they are

1. Market access and market linkages development

To improve the capacity of organised small and medium sized farmers to undertake efficient and market-oriented production processes and to enhance management and organisational capacities to access national and international markets.

2. Food quality and safety management systems

To establish an Agricultural Health and Food Quality Management System that will contribute to improving the competitiveness of Jamaican agriculture as well as the health status of the human population through the production of safe and good quality agricultural products and food for local consumption and export.

3. Agri-Business Value Chain Development

To promote the integration of farmers and/or farmer organisations into agricultural value chains while also contributing to the stimulation of the private sector involvement in the sector through

- a. Provision of infrastructural works in Agro-Parks
- b. Institutional strengthening of Agro-Investment Corporation - Investment arm of the Ministry

Aim

The project aims to support the development of a modern, efficient, internationally competitive and sustainable agricultural sector - opening and expanding domestic and international market access and opportunities for Jamaican products

Achievements

Component 1

- Supply of 30 laptops to augment capacity of RADA
- Marketing skills training conducted through 4 workshops with 4 clusters
- Provision of 15 post-harvest kits to RADA Marketing unit to support training in agribusiness and marketing.
- Farmer field school trainings in onion, pineapple and beauregard sweet potato production.
- Validation of the US South Florida and Northeast Markets
- Execution of US Trade Mission to Jamaica
- Execution of training workshops for producers and RADA/MOAF marketing officers in Export Management.
- Facilitation of missions
 - Export market platform development in Miami, Florida
 - Sweet potato technical mission to North Carolina
 - 2015 National Sweet Potato Collaborators Group Annual Meeting
 - 2015 US Sweet Potato Council Conference
 - American Spice Trade Association Annual General meeting (upcoming)

Agro-Parks Development Programme

- Facilitation of marketing contracts in the Yallahs Agro Park to supply dynamic local market for onions (20 contracts for fall 2013 and 38 contracts for fall 2014)
- Facilitation of Marketing Contracts in New Forrest Duff House Agro Park to supply 20,000 lbs of scallion per week to Grace Processors Ltd.
- Facilitation of Marketing Contracts in Spring Plain/Ebony Agro Parks for the supply of assorted vegetables to Everything Fresh Ltd for supply to the Tourism/Hospitality Sector
- Hiring of a National Cluster Coordinator and two additional cluster coordinators to cluster producers in the Yallahs, PGR, Spring Plain/Ebony and New Forrest Duff House Agro Parks

Component 3

See Agro-Parks Development Programme

Principal Focus for 2016/17

Component 1:

1. Training of Farmers and Stakeholders and development of training materials for clustering activities.

2. Registration of Farmer Groups as Cooperatives

Component 2:

3. Infrastructure and systems for GLOBALGAP Certification for Four (4) Agro Parks established

4. Establishment of Laboratory Network System and central database

5. Refurbishment of parish offices and laboratories

- Component 3:**
6. National ID and Traceability System (NAITS)
 7. Enactment of Food Safety Policy Legislation
 8. Implementation of Pesticide Survey and Research
 9. Purchase of equipment for labs (lots 4-6)
 10. Establishment of reliable water supply system and effluent treatment facility for Hill Run Agro Park
 11. Establishment of Hounslow Agro park
 12. Conduct Environmental Assessment (EA) for Spring Plain.
 13. Establishment of Sweet Potato and Onion demo plots at 4 Agro Parks, Sweet Potato clean seed development and Farmer field schools
 14. Water quality analysis for Agro Parks

3. The Ministry's Policies & Legislations

The Ministry seeks to formulate and review policies and legislations in accordance with the objectives and goals of the Vision 2030. The policies and legislations support the Ministry's strategic priorities to facilitate an enabling planning, legislative and policy framework. This is to ensure food security, sustainable use of agricultural land & fisheries resources and facilitate an enabling local business environment. In addition, the legislative framework enhances the development of sound policy for key sub-sectors using a participatory approach.

Aim

To provide an enabling planning, legislative and policy framework to ensure food security, sustainable use of agricultural land and fisheries resources and to facilitate an enabling local business environment.

Achievements

Policies

The Ministry was able to submit ***Seed Policy and Action Plan*** to Cabinet for Approval. The Policy will establish a sustainable seed system that ensures a consistent and reliable supply of clean, affordable and accessible seed in support of agricultural production, productivity, food security and biodiversity. In addition, the Ministry was able to promulgate.

Legislations

- I. The Fishing Industry Act of 1976 was amended in 2015 by way of the ***Fishing Industry (Amendment) Act, 2015***, to inter alia, increase the fines in the Act.
- II. The ***Animals (Diseases and Importation) (Marking of Bovine Animals) Regulations, 2015*** was promulgated on December 22, 2015. This legislation mandates ear-tagging of all bovine animals with the corresponding requirement of bovine passports for each bovine animal required for movement of the same, for the purpose of traceability.
- III. ***The Dangerous Drugs (Amendment) Act, 2015*** was passed by both Houses of Parliament in February 2015 and came into effect on April 15, 2015. The Cannabis Licensing Authority (CLA) was established pursuant to section 8 of the dangerous drugs (amendment) Act, 2015.
- IV. **The Bankruptcy and Insolvency Act (2015)**: Implementation of the new Insolvency Regime involves the elimination of the outdated insolvency regime with a focus on creditor satisfaction and the creation of a modern regime aimed at debtor rehabilitation. The Office of the Trustee in Bankruptcy (OTB) has been succeeded by the Office of the Supervisor of Insolvency and the Office of the Government Trustee and the full transition is to be completed by the end of the current fiscal year. The Corporate Management Development Branch of MoFP has already approved the structure of both offices and the staffing, and budgetary allocations have been made in the 2016/17 Budget.

- V. **Modernisation of Intellectual Property (IP) Legislation:** This is required if Jamaica is to enhance its competitiveness as a premier investment location. The key areas of IP modernisation are:
- a. ***The Patents and Designs Bill*** when passed will significantly fulfil Jamaica's obligations as a party to the Paris Convention for the Protection of Industrial Property and will reflect the requirements of the Agreement on the Trade Related Aspects of Intellectual Property and the Bilateral Agreement between Jamaica and the United States of America. The Bill is now to be finalized in accordance with decisions taken at the Legislation Committee during November 2015 and it is then to be submitted to Cabinet to obtain approval for tabling in Parliament
 - b. ***The Trade Marks Act and Rules*** are being amended to incorporate the Madrid Protocol into local law. This will allow for the international registration of trademarks and the strengthening of JIPO to process applications. Further drafting instructions were issued to the CPC during February 2016.
 - c. ***The Protection of Geographical Indications Act and Regulations*** are being amended to accord the highest level of protection for geographical indications afforded by the World Trade Organization Agreement on Trade Related Aspects of Intellectual Property Rights. The Bill is now being finalized by the Ministry's legal department in consultation with JIPO.
 - d. ***Copyright (Licensing Bodies) Regulations*** are being developed to make provision for licensing bodies, otherwise referred to as collective management organizations (CMOs), to operate copyright licensing schemes. Consultations with the CMOs are currently underway.

Principal Focus for 2016/17

In 2016/17, the Ministry will seek to develop and submit to Cabinet for Approval:

1. Livestock Policy

The goal of the Livestock Development Policy is to address the challenges facing the sector as it relates to the farm animal genetic resources; nutrition and feeding; zoonotic control; value chain development, and the livestock support services of extension and research and development.

2. Youth in Agriculture Policy

The YIAP is intended to provide the framework for guiding all the Agencies and Institutions contributing to the development of the agricultural sector using youth population as the vehicle. Importantly it should minimize duplication and splintering of resources and programmes especially among Government Agencies, and establish a framework for focused coordination. The policy will also provide the enabling environment for the realisation of the sector's 2030 goals and establish clear pathway for transition and sustainability. The objectives of the policy are to provide a framework for:

- The creation of a strategic plan for youth involvement in the sector
- Creation of specific guidelines for access to land and other resources
- Youth participation in the sector's policy decisions

- Youth in agriculture education
- Coordination of rural and agriculture youth related activities
- Funding for rural youth and agriculture related programme

3. National Services Policy

To guide the development of the services sector and explore expansion strategies, as well as to help shape the regulatory environment governing the modes of services supply.

4. Revised National Quality Policy

One of the important features/key activities in the development of a modern and appropriate quality infrastructure is the revision of the National Quality Policy (NQP) of 2001 to make it current and applicable to the current global trade and economic development paradigm. Global business development and trade agreements with the attendant conformity assessment regimes have evolved significantly since 2001 and as such the quality infrastructure must be significantly enhanced through the implementation of a more appropriate National Quality Policy.

5. National Industrial Strategy

This strategy is being led by the Industry Division of the MIIC and will seek to increase the exposure of manufacturers to relevant and innovative production technologies as a foundation for internationally competitive industry structures.

6. National Consumer Policy

The National Consumer Policy will contribute to the promotion and protection of consumer/provider interests in relation to the supply of goods and the provision of services and; an increase in vigilance on the part of consumers so empowering them to make better informed decisions. Work on the Policy has not yet commenced but it is anticipated that development of the Policy will begin in the 2016/2017 Financial Year.

Legislations to be passed during the legislative year:

- ***Fishing Industry Act***

To repeal and replace existing Act for the better management of the fishing Industry which includes the increase of fines in the existing Act of 1976. Currently, further drafting instructions has been issued to the Chief Parliamentary Counsel (CPC).

- ***Jamaica Agricultural Commodities Regulatory Authority Act*** (proposed name) To create a regulatory body that would replace the Coffee Industry Board, Cocoa Industry Board and the Coconut Industry Board and also succeed the Export Division of the Ministry of Industry, Commerce, Agriculture & Fisheries in relation to nutmeg, ginger, turmeric and pimento. Progress to date, draft Jamaica Agricultural Commodities Regulatory Authority Bill

Amendments to existing Acts/Legislation:

- Proposing Amendments to the ***Animals (Diseases and Importation) Act*** to facilitate importation, trade, storage etc. of animals and animal products with regard to safety and minimising the effect of disease.
- Proposing Amendments to the ***Agricultural Produce Act*** to strengthen and modernize this legislation for the purpose of effectively regulating movement of agricultural produce (traceability of agricultural produce from farm to fork).

4. Agencies and Board Summary Report

Industry and Commerce

Business and Trade Facilitation

DEPARTMENT OF CO-OPERATIVES AND FRIENDLY SOCIETIES (DCFS)

Mission and Goals

The Department of Co-operatives and Friendly Societies has responsibility for administering the Co-operative Societies Act, the Friendly Societies Act and the Industrial and Provident Societies Act and their respective Regulations. Effective January 1, 2014, the Department has also been designated 'Charities Authority' with the responsibility for the registration, regulation, administration and governance of Charitable Organizations desirous of benefiting from tax relief within Jamaica.

The Department's mandate under the Jurisdiction of these Acts and associated Regulations is focused primarily on ensuring the safety of the Societies' assets, the protection of Members' savings and investments and the protection of other stakeholders' interests.

Major Achievements for FY 2015/2016

- Registration: 32 Societies (8 C/S 22 F/S 2 IP)
- Audits: 132 Societies 247 Audit Years
- Investigations : 40 cases
- Full and Partial Inspection: 88 completed; 39 in progress
- Financial Assessment: 53 Societies
- Pre-Audit Checks: 65 Societies
- Account System Development: 50 Societies (0 C/S 50 F/S 0 IP)
- Assessment of Systems & Internal Control: 14 (1 C/S 13 F/S 0 IP)
- Group Organization: 46 Societies (13 C/S 33 F/S 0 IP)
- Group Supervision: 46 Societies (10 C/S 32 F/S 4 IP)
- Research, Development Planning, Resuscitation: 1 Societies (0 C/S 1 F/S 0 IP)
- Training Movement: 896 Societies (176 C/S 720 F/S 0 IP)
- Training Staff: 43 persons
- Special Projects: 3 projects

KEY: C/S - Co-operatives Societies F/S - Friendly Societies IP - Industrial and Provident Societies

Principal Focus for FY 2016/2017

- Charity Sector
 - Drafting of regulations to accompany the new Charities Act by 2016
 - Continuous registration and renewal of Charity Status
 - Convening ongoing Sensitization Sessions with stakeholders
- Facilitate consultation amongst stakeholders in finalizing the BOJ/Credit Union Regulations 2016/2017. With the modernization of the Co-operative Societies Act/Regulations the Financial Year 2016/2017, the transfer of the regulatory functions for the Credit Unions to BOJ can be facilitated.
- Continue stakeholder consultations to facilitate amendments to the Friendly Societies and Co-operative Societies Acts by third quarter 2016/2017.
- Amendments of the New Agricultural Loan Society and Approved Organizations Act during 2017/2018. Revisit present Regulatory Framework with a view to strengthening promulgation of the amended Act.

FOOD STORAGE AND PREVENTION OF INFESTATION DIVISION (FSPID)

Aims and Objectives

FSPID operates under the Food Storage and Prevention of Infestation (FSPI) Act (1958) and Regulations (1973). Its aim is to provide technical and regulatory services to ensure the safety and wholesomeness of food/feed entering commerce through sound scientific principles in a timely and professional manner. This mandate is attained by inspecting, sampling, conducting laboratory analyses and disinfestation activities along the value chain from “farm to fork” to ensure that food and feed offered to consumers, is free from harmful organisms, pesticide residues and other contaminants.

Establishment of the Agency

The Food Storage and Prevention of Infestation Division (FSPID) was established in 1958. The purpose of the FSPID was “to make provision of food and for the prevention of loss of food by infestation and for purposes connected therewith”. The division was established under the Ministry of Commerce to facilitate trade and monitor food in storage.

Major Activities during FY 2015/16

- 11,901 Inspections
- 648,807 MT inspected
- 108 Disinfestations
- 172 Statutory Notices served
- 1,703 Export Certificates issued
- 2,110 MT Reconditioned Foodstuff
- 1686 samples received
- 288 tests conducted
- 482 Reports dispatched
- 3517 Analysis conducted
- 212 Consultations
- 690 Inspections done by laboratories
- 36 Exhibitions
- 10,000 brochures distributed
- 823 bait stations
- 3995 analysis conducted
- 5 training programs

Main Achievements during FY 2015/16

- Inspected 648807.21MT of imported goods
- Conducted Integrated Pest Management training for food industry manufactures and School of Public Health
- Coordinated and executed a Fumigation Training with external customers
- Collaborated with external stakeholder to facilitate workshops and training sessions.
- Conduct sensitization sessions for customers as it related to the Food Storage Division, general food safety and pesticide usage.

Principal Focus for FY 2016/2017

Food surveillance through the inspection services of FSPID remain top priority as the division maintains a presence at our borders and continues with inspections of food in storage island-wide. Accreditation of the FSPID laboratories for tests will also remain principal focus as this means that results will stand up to scrutiny and will not likely be contested locally or internationally. Some exporters depend on Certificates of Analysis from our laboratories for food/feed being free of mycotoxins, extraneous matter, pesticide residue and other chemicals which facilitate the process of goods being cleared without delays and costly overseas testing.

COMPANIES OFFICE OF JAMAICA (COJ)

Aim and Objectives

- Maximize customer satisfaction
- Increase compliance rates
- Maintain financial efficiency/stability
- Increase efficiencies through technology
- Develop capacity and capability of employees
- Optimize operations and service efficiency

Establishment of the Agency

The Companies Office of Jamaica, formerly the Office of the Registrar of Companies was established as a Department of Government in accordance with Section 351 of the Companies Act in 1975. On April 1, 1999 the Office was conferred with Executive Agency status in accordance with the Executive Agencies Act.

Major Activities during FY 2015/2016

- The COJ Amnesty
- The Implementation of the Upgraded COJ Website
- The Electronic Business Registration (eBRF) Project

Main Achievements during FY 2015/2016

- **The COJ Amnesty:** The COJ Amnesty was an unqualified success. During the Amnesty 26, 706 documents were filed. The actual number was 216% above target. 5,295 companies for profit filed 18,381 Annual Returns while 779 not-for-profit companies filed 2, 856 Returns. 2,557 companies applied for removal while 1,515 Business Names applied for closure. The COJ budgeted to collect \$44.5M in fees during the Amnesty. Actual fees collected amounted to \$84.1M which was 189% above budget.
- **COJ's upgraded Website:** The upgraded Website allowed for a number of new services to be offered online. These new services included online requests for Letters of Confirmation and Good Standing, name search and name reservation for new companies, document tracking and document file watch. As is expected with the implementation of new software, customers experienced several issues with the new Website. The most frequent complaint was that they were prevented from viewing and printing documents unless they installed a particular software on their computers. The initial download was quite complicated and frustrating to customers. The COJ IT Support Unit assisted customers individually to resolve the issues but the COJ Development Team was unable to permanently rectify the problem since full attention was being given to the eBRF Project.

Principal Focus for FY 2016/2017

- The implementation of the electronic Business Registration Form

- ISO certification by March, 2017
- Exploring the various options available for the registration of offshore companies provided the COJ receives the mandate to provide the relevant registration services to the Financial Services Authority
- Continuing work on the upgrade of the Agency's Website
- Efficient operations

TRADE BOARD LIMITED (TBL)

Aims and Objectives

- To issue import and export licences for specific items that may impact negatively on the environmental, social and economic conditions of the country, in a manner consistent with Jamaica's international obligations.
- To monitor and regulate new and used motor vehicle dealers.
- To monitor imports and exports of specified commodities as required.
- To develop/monitor Strategic Business Plans/Operational Plans/Budgets to support the strategic/operational/financial requirements of the entity.
- To continuously improve the efficiency and effectiveness of the four (4) above-enumerated core deliverables.
- To support development of the country's trade policy framework/implementation by ensuring closer monitoring of the Rules of Origin governing various preferential trade agreements.
- To build and maintain a database on imports and exports through the development of a National Trade Information Network.
- To increase facilitation of trade and commerce by building public/stakeholder awareness of benefits available under the various trade agreements.
- To facilitate amendments to the Trade Act (Law 4) 1955 to reflect and define the role and functions of the entity.
- To drive the integration of the Trade Board Information System (TBIS) with other government trade-related information systems, pursuant to establishing Jamaica's Single Electronic Trade Window.
- To provide secretariat services to the Trade Facilitation Task Force of Jamaica.

Establishment of the Agency

The Trade Board Limited, which was established as a limited liability company in December 1982, is a regulatory agency of Government, operating under the portfolio mandate of the Ministry of Industry, Commerce, Agriculture and Fisheries (MICAF) and the legal authority of Section 12 of the Trade Act 1955.

Major Activities during FY 2015/2016

- Prepared of updated draft policy relating to the National Export Strategy (NES).
- Updated analyses of products, companies and countries towards ensuring existing database in support of certification of manufacturers/exporters, is in keeping with international standards.
- Prepared Cabinet Submission for implementation of the Trade Facilitation Programme.
- Developed draft project plan for improvement of trade facilitation in Jamaica.
- Prepared roadmap document outlining issues and recommendations for the improvement of trade facilitation measures in Jamaica.
- Developed Dealer Disclosure Certification Programme.

Main Achievements during FY 2015/2016

- Trade Facilitation Memorandum of Understanding (MOU) signed by the relevant Ministers and Permanent Secretaries of Ministries directly involved in trade
- Project Plan for trade facilitation finalized and approved articulating direction/ course of action towards attaining a modernized, internally competitive trade regulatory infrastructure in Jamaica.
- Participated in joint mission comprising the International Trade Centre (ITC), World Bank and the United Nations Conference for Trade and Development (UNCTAD); entailed consultations with stakeholders regarding the trade facilitation roadmap and assessment of Jamaica's needs for technical assistance.
- Participated in World Bank Mission involved in the establishment of Jamaica's trade portal; visioning workshop on single windows for trade; and determining the level of technical assistance (via workshops) required by border agencies.
- Draft concept paper completed with respect to the Trade Act
- Booklet on Trade Agreements completed to inform stakeholders on opportunities and benefits to be derived in exports.
- Completed the development of the Auto Brokers Certification system to facilitate the streamlining and monitoring of participants.
- Implementation of revised import/export licensing fees.
- Contributed \$249.92M to the Consolidated Fund. This represents an increase of 105.08% over the \$121.86 M contributed during the previous financial year 2014/2015.

Principal Focus for FY 2016/2017

- To review and make recommendations on amendments to the Electronic Transactions

Act 2007, towards the creation of a secure system for communication and conduct of business over the Internet through full implementation of the Government of Jamaica Public Key Infrastructure (PKI) Project.

- To ensure enhancement of internal efficiencies via, inter alia, pursuit of ISO (Total

Quality Management) certification attesting to continuous improvement through clear comprehensive documentation of all operational guidelines/processes/procedures.

- To maintain a key role in the national trade facilitation thrust, supporting the National

Export Strategy (NES II – 2015-2019), attainment of Single Electronic Window etc., consistent with TBL special projects portfolio developed in FY 2015/2016.

Customer and Business Relations

ANTI-DUMPING AND SUBSIDIES COMMISSION (ADSC)

Aims and Objectives

The role of the Commission is to provide access to a remedy for Jamaican producers against imports which are unfairly traded or which enter Jamaica in increased volumes and cause or threaten injury to domestic producers. The Commission's knowledge and expertise in international trade is applicable beyond investigations and have been recognised by the appointing and performance of the Executive Director as a Panellist adjudicating several disputes at the World Trade Organisation (WTO).

Establishment of the Agency

The core mandate is from the World Trade Organisation Agreements on Antidumping, Subsidies and Countervailing Duties and Safeguards; and directly from the Acts implementing the Agreements in Jamaica. The Commission was established under the Customs Duties (Dumping and Subsidies) Act of 1999 (CDDSA). The Safeguard Act was passed in 2001 and its implementation was added to the mandate. The redress available to industries is referred to as Trade Remedies. The Commission performs investigations, research and leads in educating stakeholders, the public and public sector colleagues on the regime.

Major Activities during FY 2015/2016

- Assisted Jamaican industries, advisors, importers and exporters to use the international trade remedy disciplines (antidumping, subsidies countervail and safeguards) by training meetings; industry consultations; education interventions in newspapers; social media.
- Hosted targeted industry training seminar.
- Provided policy and negotiating support to the Government and private sector;
- Performed trade-related research and analysis and provided advice.
- Facilitated development of legislation, international trade policy, and negotiations.
- Identified Resources; Project Research; Analysis and Negotiation for resource-sharing.

Main Achievements for FY 2015/2016

- The Staff developed and refined its Industry outreach/contact programme.³ The Staff made contact with more than 300 potential stakeholders in the last two years. Companies in certain sectors were identified. Face to face consultations were completed with companies and specialised training delivered to key executives. Inquiries are responded to with optimal information and instruction to maximise injured industries' understanding of trade remedies.

³The Commission is careful, as under best practices worldwide, to treat as Confidential the names of companies with which it confers regarding a potential Trade remedy case but responds to queries of the portfolio Minister.

- Vision 2030 Medium Term Framework (MTF) for FY2015-2018 was concluded in the year to include seminars and specialised training by ADSC. Training modules were prepared for delivery to identified businesses.
- Partnership Talks were pursued other entities in an effort to augment resources, with some success.
- Industry Help Desk was pursued (to be phased over three to five years). The Commission engaged stakeholders, the Ministry, Private Sector and other partners to make progress.
- Research and analysis. ADSC Staff research into subsidisation in the economy of Trinidad and Tobago formed the basis for assistance to policy makers and participants in the market and the Staff gave assistance in analysing trade issues that arose in respect of various products that included Fertiliser, Sugar, Rum, Lube Oil, Energy Subsidies.

Principal Focus for FY 2016/2017

- **Legislation.** The CDDSA requires amendments for Jamaica's compliance with obligations under the WTO Agreements. Most urgent is the need to address deficiencies in the current Act that affect implementation and enforcement of the Commission's duty determinations.
- **Industry Training and Support.** The Staff will continue to close gaps in knowledge for industries which have a case to be filed or help with related strategy; with meetings, consultations, and small group training.
- **Education and training audio-visual and other materials will be developed.** Content management of the Commission's website and Facebook (social media) to train, educate and increase efficient, effective service delivery.
- **Project Funding and sponsorships will be sought** to help perform Industry Training/Industry Help Desk and upgraded Information Technology.

CONSUMER AFFAIRS COMMISSION (CAC)

Aims and Objectives

Improve public awareness and service delivery

- Implement innovative consumer touch point solutions
- Expand the reach of consumer/business education programmes
- Broaden the quantum, range and utility of the research outputs
- Revamp and improve the complaint handling capability
- Maintain a sustained media presence

Improve the enabling environment

- Enforce provisions of consumer protection legislations
- Strengthen the legislative framework
- Strengthen the capacity to influence public policy

Strengthen operations and systems support

- Improve data handling capability
- Improve the management and reporting system
- Strengthen IT security

Enhance resource stewardship & accountability

- Garner additional funds through paid research activities and project financing
- Realign financial and material resources with economic realities
- Maintain reporting and accountability to stakeholders

Establishment of the Agency

The Consumer Protection Act (2005), as amended in 2012, established the CAC as a statutory body empowered to promote and protect consumer interests, in relation to the supply of goods and the provision of services in order to ensure protection of life, health and safety of consumers and others.

The Agency was formerly known as the Prices Commission which was established in 1971 based on amendments to the Trade Act of 1970.

Major Activities and Achievements during FY 2015/2016

- CAC Strategic Review and Transformation Plan – completed document submitted to Ministry by Board
- 126,903 consumers sensitized in 424 activities, i.e., 27% or 26,903 over target
- 1,161 of 1,438 cases resolved or 81% resolution rate (not including ‘bad gas’)

- \$27.14M compensation/refunds - 69% over target of \$16M
- 876 requests for advise - 16% more than previous year
- 12 each grocery and petrol surveys
- 20,192 new media/ SMS/ Email marketing exposures
- 926 traditional media exposures
- 26,201 first time visitors to the website (2,000 more than 2014/2015); 33,570 total visitors;
- Consumer Protection Tribunal (CPT) began hearing first case
- CEO appointed to represent consumers on the Bad Gas Committee (ongoing)
- Provided opinion and feed-back on legislation and policy documents including: Telecommunications Act, BOJ Code of Conduct, Draft Model CARICOM Consumer Protection Bill, Draft National Financial Inclusion Strategy, White Paper regarding Special Economic Zones, Legislations governing framework of ICT Sector.
- Contributed total of \$595,000 to consolidated fund from paid research earnings
- Achieved Gender Equality Certification from the Bureau of Gender Affairs

Principal Focus for FY 2016/2017

- **The Business Environment**
 - Develop a national consumer policy document;
 - Undertake a gap analysis of legislation which ought to include consumer protection mechanisms.
- **Collaboration and Partnerships**
 - Collaborate with Jamaica Customer Service Association to develop and implement a national customer service campaign (MTF Outcome #12);
 - Collaborate with the Ministry of Education, Youth and Information to publish Text Book Survey;
 - Conclude discussions to formalize collaboration with PSOJ, JMA and Chamber of Commerce to include sensitization session for business community;
 - Conclude discussions to collaborate with Consumer International (CI) on financial education study sponsored by the International Finance Corporation (IFC).
- **Education**
 - Publish a simplified version of the CPA;
 - Re-establish Consumer Alert publication and publish at least 2 other surveys;
 - Design a CAC mascot for branding in print and electronic media and implement consumer engagement campaign 'Cyan bother but you must'.
- **Enforcement /Compliance & Advocacy**
 - Continue advocating settlement for consumers who lodged 'Bad Gas' complaints;
 - Continue advocating for CAC to be appointed the independent body established to handle financial complaints.
- **Governance**

- Publish a Citizen's Charter;
- Target 3 entities for paid research and remit proceeds to Consolidated Fund;
- Continue preparing for ISO 9001 Certification.
- **Technology**
 - Upgrade Customer Management Software (CMS) (used to capture consumer complaints);
 - Establish 'online chat' feature on CAC Website and launch Website User Experience survey;
 - Finalise CAC's connection to the GOJ Open Data Portal.

FAIR TRADING COMMISSION (FTC)

Mission and Goals

The Fair Trading Commission (FTC) was established in 1993 to administer the Fair Competition Act (FCA). Its mission is to provide for the maintenance and encouragement of competition in the conduct of trade, business and in the supply of services in Jamaica with a view to ensuring that consumers benefit from lower prices, greater product choices and better quality of goods and services. The Goals are to:

- Protect Consumers: Prevent misleading advertising and other anticompetitive business practices that affect consumers directly.
- Maintain Competition: Prevent anticompetitive business practices in the marketplace.

Major Activities & Main Achievements during FY 2015/2016

Enforcement

- The FTC entered into a Consent Agreement with Radio Jamaica Limited and Gleaner Company Limited and obtained cost of \$3,267,000. The objective of the agreement is to prevent the amalgamated company from engaging in anticompetitive discriminatory practices with respect to independent advertising agencies.
- The Supreme Court delivered judgment in the case of Fair Trading Commission v Crichton Automotive Limited (CAL). In its judgment the Court found that CAL is liable for misleading representation under section 37 of the FCA. The Court imposed a penalty of \$2 million dollars against CAL for breach of the FCA; and awarded costs to the FTC.
- Advanced work on the amendments to the FCA, primarily through discussions with the Ministry and the Chief Parliamentary Counsel. The Fair Competition Act (Amendment) Bill 2016 is nearing completion.
- Preparation for appeal to the Privy Council. Following from a Court of Appeal Judgement handed down in December 2014; the FTC has been placed in a position where the FCA has become virtually unenforceable. The FTC applied to the Court of Appeal for, and received conditional leave to appear before the Privy Council.

Advocacy & Market Enquiries

- Comments and review of Government policy/legislation: Work covered 8 sectors including education, tobacco, motor vehicle, cable television, telecommunications, petroleum, construction, neutraceuticals, and 13 subject areas.
- Held discussions with the Ministry of Science Technology Energy & Mining, the Petroleum Trade Reform Committee, the Jamaica Gasolene Retailers Association and the Jamaica Association for Petroleum Marketers towards strengthening the legislative and operational framework of the petroleum sector which will likely lead to a more seamless functioning of the sector and reduce disruptions.

- Completed market studies on the groceries and motor vehicle insurance sectors; as well as 16 opinions covering the media, groceries, petroleum, education sectors; and 78 Requests for Information covering the construction, electricity, telecommunications, financial services, automobile, furniture sectors.

Public Education

- Hosted the 13th Annual Meeting of the Latin American Competition Forum (LACF) National Competition Day in Montego Bay. The event was significant to the positioning of the FTC among competition agencies in the western hemisphere, as a credible and notable institution. 61 persons from 27 countries and institutions participated and ties with the OECD, IADB and member countries were strengthened.
- Published the 2016 issue of **Compete**, the annual magazine of the FTC. Themed “*Competition in the Retail Sector – Is the consumer still King?*”, the magazine contains informative articles geared at enhancing consumers knowledge of how competition works for their benefit.

Developmental

- Furthered discussions to secure a Consultant under the World Bank Foundations for Competitiveness & Growth Project, to develop a merger regime framework. The Terms of Reference and an invitation to bid will be issued early in the 2016/2017 FY.

Regional

- Submitted comments and recommendations on several CARICOM initiatives: (a) Framework for Needs Assessment for competition, public procurement & trade facilitation; (b) the 2016/2017 Work Plan and Budget of the CARICOM Competition Commission (CCC); (c) CSME Manual of Administrative Procedures; Mergers & Acquisitions Policy for CARICOM; (d) Specific Needs Assessment for FTC; (e) Consultative meetings to agree on recommendations for mechanisms to govern competition in Member States which do not have a competition regime in operation.

Principal Focus for FY 2016/2017

Enforcement

- Reform of the Fair Competition Act (FCA). Complete the Fair Competition Act (Amendment) Bill and submit to Parliament.
- Include provisions in the FCA that will guide the creation of a Merger Control/Review regime
- Appeal to the Privy Council. Make appropriate preparations for having the matter heard.
- Model Year discrepancy: obtaining redress for consumers.

Advocacy & Market Enquiries

- Complete market studies and/or enquiries on at least 6 sectors or areas including: (a) electricity; (b) effects of Jamaica's Global Logistics Hub on competition; (c) construction, specifically cement; (d) micro-financing; (e) disruptive technology in the telecommunications market; and (f) port services.

Developmental

- Finalize Terms of Reference to secure Consultant to develop merger regime framework and collaborate with the Planning Institute of Jamaica and the World Bank to hire a Consultant and have deliverables completed.
- Assessing the impact of FTC interventions.

Other

- FTC Staff will train the staff of competition authorities and Government departments in several CARICOM countries.
- Continue the process towards obtaining ISO Certification.
- Hosting of the Annual Shirley Playfair Lecture and other outreach events.

JAMAICA INTELLECTUAL PROPERTY OFFICE (JIPO)

Aims and Objectives

- To establish and administer a modern and effective intellectual property rights system that will act as a catalyst for international competitiveness, facilitating economic growth and national development.
- To create a robust ecosystem for intellectual property in Jamaica to attract investments in high-grossing industries that will facilitate the growth of local industries, thereby enabling all Jamaicans to benefit from the three critical areas that are necessary for a strong IP environment: Protection, Sharing/income generation and Enforcement.

Establishment of the Agency

The Jamaica Intellectual Property Office (JIPO) was established on February 1, 2002 as a statutory authority under provisions of the Jamaica Intellectual Property Office Act.

Major Activities during FY 2015/2016

- Amendments to Protection of Geographical Indications Act being worked on with MICAF
- Amendments completed and sent to Ministry of Industry, Investment & Commerce (MIIC) on the Patents & Designs Bill – Bill being amended to comply with the World Trade Organization (WTO) Trade-related aspects of Intellectual Property Rights (TRIPs) obligations and accommodate the international patent registrations under the Patent Co-operation Treaty (PCT);
- Work in progress with the MIIC and the Office of the Parliamentary Counsel (OPC) on amending the Trade Marks Act 1999 and Trade Marks Rules 2001 to modernize the Act and Rules and provide for the international registration of trade marks under the Madrid Protocol;
- Work in progress with the Ministry of Industry, Commerce, Agriculture and Fisheries and the OPC on the drafting of a new Bill for the Protection of New Varieties of Plants;
- Maintaining a presence and voting power in international, regional and national to influence policy and legislation. Attended the World Intellectual Property Organization (WIPO) General Assembly, had dialogue with WIPO officials on projects designed to facilitate implementation of activities to assist Jamaica, and the Standing Committee on Trade Marks, Designs and Geographical Indications meeting and presented on Jamaica's proposal for an international instrument to protect country names.
- General & specialised public education within the public and private sectors, educational institutions, and entities, relating to agriculture, cultural and creative industries, innovation, science, technology, the emerging cannabis and nutraceutical industries. Intellectual Property Week 2015 (April, 2015); Development of IP Public Awareness Campaign using animated advertisements for TV and radio.
- Facilitated commencement (in September, 2015) of National Intellectual Property Audit, as part of project for development of National Intellectual Property Strategy (pending, 2016)
- Hosted WIPO Meeting of Heads of Intellectual Property Offices of the Caribbean and WIPO

Ministerial Level Meeting (for Ministers with responsibility for Intellectual Property in the Caribbean) in November, 2015

- Initiated discussions with public and private sector entities including banking and financial institutions to encourage and facilitate the use of the Secured Interests in Personal Property Act (SIPPA) for IP monetisation and collateralisation.

Main Achievements during FY 2015/16

- Passage of the Copyright (Amendment) Act 2015 in August, 2015 extending the term of protection of copyright owners and providing for with exceptions to the copyright regime for visually impaired persons, persons with print disabilities (a person who cannot effectively read print because of a visual, physical, perceptual, developmental, cognitive, or learning disability) and the hearing impaired to allow them to place material into accessible formats.
- Completion of the draft Patents and Designs Act;
- Completion of drafting instructions for the Protection of New Varieties of Plants;
- Earned revenue of J\$102.2M for the F/Y 2015/16, up 12% from F/Y 2014/15.

Principal Focus For 2016/17

- Business Development & Wealth Creation
- Passage and enactment of the Patents & Designs Law
- Passage of the Trade Marks (Amendment) Law
- Passage of the Protection of Geographical Indications (Amendment) Law
- Review and implementation of further amendments to the Copyright Act
- Implementation of regional patent training project
- Review and passage of the Protection of New Varieties of Plants Law
- Completion and implementation of National Intellectual Property Strategy
- Development of a formal methodology and institutional support for IP Valuation, IP monetisation and IP collateralisation
- Drafting of legislation for the protection of Traditional Knowledge and Traditional Cultural Expressions
- Modernizing the operations and automation of services of the Office.

OFFICE OF THE GOVERNMENT TRUSTEE (OGT) **(Formerly Office of the Trustee in Bankruptcy)**

Aim and Objectives

To contribute to the strengthening of investor confidence in Jamaica providing by a comprehensive and efficient insolvency service.

- Efficient administration of estates
- Proper management of and accounting and reporting for estate and departmental funds
- Maximum income generation and debt satisfaction
- Reliable Insolvency Status Verification
- Improved/maintained staff competence and infrastructure
- Increased public knowledge of insolvency and insolvency administration
- Development of internal policies and improvement of procedures

Establishment of the Agency

The Office of the Government Trustee (OGT) was established by the Insolvency Act 2014 ('the Act') which came into effect on January 1, 2015. The Act repeals the Bankruptcy Act (BA) pursuant to which individual bankruptcy was previously administered and makes substantive amendments to those sections of the Companies Act which provide for the winding up of insolvent companies. The Act therefore, makes provision for corporate and personal insolvency and has as its objective the rehabilitation of insolvents. In addition, specific provision has been made for the introduction of a proposal mechanism by which debtors can seek assistance prior to bankruptcy.

Major Activities during FY 2015/2016

- Processing of applications for assistance under the Insolvency Act
- Identification, recovery, management and disposal of assets
- Public Examination of bankrupts under the Bankruptcy Act
- Convening of Meetings of Creditors
- Management and investment of estate funds
- Financial Investigation, Accounting and Reporting
- Insolvency Status Verification
- Recruitment and training of staff
- Procurement of fixed assets and other resources
- Public education and customer service management

Main Achievements during FY 2015/2016

- Public Examinations: 74 bankrupts were examined
- Meetings of Creditors: 6 of 8 convened
- Fees earned from incidental legal services: \$7,025,607.60 earned in 3 matters
- Statutory commission earned: \$2,022,446.15
- Banking: \$20,598,198.91 total balance on estate and companies accounts at end of FY 2015/2016

- Investments: \$497,651,271.73 held on behalf of estates and companies at end of FY 2015/2016
- Dividend payments: 15 estates and companies; 54 creditors; \$34,343,928.58 paid
- Insolvency Status Verification: 3,665 requests received; \$446,000.00 earned as fees
- Procurement: motor vehicle, 4 executive chairs, 2 computers, a printer, fans and other office supplies
- Training: 13 of 15 training needs identified satisfied (Strategic and Corporate Planning, Supervisory Management, Government Accounting, Inventory Management and Certificate in Administrative Management)
- Recruitment: 3 vacancies filled (Collections Officer, Senior Secretary and Estates and Liquidation Administrator)
- Performance Management: 15 of 15 appraisals conducted and training needs assessment done
- Customer Service: 86% (58 of 67) customers reporting satisfaction with service

Principal Focus for FY 2016/2017

- Development of new handbooks and brochures reflecting new insolvency procedures
- Formulation and implementation of proposals for new and existing clients
- Regularization of departmental and estate accounts
- Preparation and submission of accounting statements and reports for estates
- *Procurement*: 6 executive chairs, 3 computers, 1 conference room tables, and multi-function machine
- *Training*: Strategic and Corporate Planning, Supervisory Management, Finance for Non-Financial Managers, Government Accounting and Certificate in Administrative Management
- *Recruitment*: Director of Insolvency Administration and Records and Information Officer
- *PMAS*: Finalization of Unit and Individual Work Plans and implementation of PMAS
- *Succession Planning*: All Units

OFFICE OF THE SUPERVISOR OF INSOLVENCY

Aims and Objectives

The Office seeks to facilitate the rehabilitation of debtors and the preservation of viable companies having due regard to the protection of the rights of creditors and other stakeholders.

Major Activities during 2015/16

- Processing of applications for Trustee Licences
- Issuance of Trustee Licences
- Consulting with the Ministry on the proposed organizational structure for the Office
- The process of identifying a location for the Office and the Office of the Government Trustee in collaboration with the Ministry

Main Achievements during FY 2015/16

- Issuance of Trustee Licences
- Approval of organizational structure for the Office by the Corporate Management Division in the Ministry of Finance
- Coordination of communication amongst stakeholders
- Identification of location for the Office and the Office of the Government Trustee in collaboration with the Ministry
- Processing of applications of insolvent persons
- Assignment of a total of seven (7) matters to Government Trustee

Principal Focus for FY 2016/17

- Relocation of the Office of the Supervisor of Insolvency
- Staffing of the Office of the Supervisor of Insolvency
- Promulgation of the Insolvency Rules of Court
- Public and stakeholder sensitization on the Insolvency Act
- Continued issuance of trustee licences
- Continued assessment of applications of insolvent persons
- Continued assignment of appropriate matters to Government Trustee

Quality Infrastructure

BUREAU OF STANDARDS JAMAICA (BSJ)

Aims and Objectives

The BSJ undertakes trade facilitation, business development and consumer protection activities in connection with standardization, metrology and conformity assessment. The main activities of the BSJ are facilitating the development of standards; conducting laboratory tests; calibrating instruments; certifying products and management systems; and delivering training courses and educating stakeholders on standardization, metrology, and conformity assessment issues.

As at 4 January 2016, the BSJ relinquished the role of regulator for locally manufactured and imported commodities for which there are compulsory standards as well as legal metrology activities (verification of the accuracy of weighing of measuring devices) to the National Compliance & Regulatory Authority (NCRA). The BSJ provides the NCRA with corporate services such as human resource management and development, financial management and IT support.

Establishment of the Agency

Statutory body established by the Standards Act

Major Activities during FY 2015/2016

- **World Bank-funded Strategic Public Sector Transformation Project** (April 2015 – March 2020) – involves:
 - separation (firewalling) of the BSJ’s regulatory functions through the establishment of a regulatory body;
 - rebranding/branding of the BSJ and NCRA;
 - revision and modernization of the regulatory framework;
 - upgrading of the ICT and laboratory infrastructure;
 - building of technical competence; and
 - replacement of the system of compulsory standards with a system for technical regulations.
- **CDB/GOJ Capacity Building for Market Access Project** (May 2015 – March 2017) - modernization of the laboratories in the Packaging Centre; redesign/redevelopment of the current BSJ website; and the creation of websites for the National Certification Body of Jamaica (NCBJ) and the NCRA.
- **CDB-funded Capacity Building of MSMEs in the Agro Processing Sector Project** (April – October 2015) – training of 25 workers in 13 processed food facilities to develop HACCP plans, to deliver training to other workers in food safety systems and to implement these food safety systems in their facilities.
- **NMI (National Metrology Institute) Metrology User Relations Project** (February 2014 – June 2017) – to increase the metrology content in the curricula of tertiary institutions.

- **World Bank-funded Expansion of the Energy Efficiency Testing and Labelling Facility Project** (July 2012 – August 2016) – to increase the capabilities of the Energy Efficiency Testing Laboratory to test domestic air conditioning units. Currently only refrigerators and freezers are tested.
- **BSJ/DBJ Accreditation of the Industrial Training Unit and Certificate Programmes Project** (September 2015 – August 2017) - seeking accreditation to ISO/IEC 17024 *Conformity assessment – General requirements for bodies operating certification of persons* and ASTM E2659-15 *Standard Practice for Certificate Programs* in order to certify persons in industry and offer internationally certified courses to industry.
- **BSJ/UWI Bamboo Research Project** (December 2015 – July 2017) - agricultural research to obtain scientific data on bamboo field growth in Jamaica to strengthen and encourage the growth of the bamboo industry.
- **BSJ/Business Partnership Programme** - building the technical skills and knowledge of personnel in three business support organizations (Jamaica Manufacturers' Association, MSME Alliance and Jamaica Business Development Corporation) to assist their members/clients to implement quality management systems within their businesses.
- **Accreditation of Laboratory Tests** - efforts to attain accreditation for 12 tests conducted by the Metallurgy, Chemistry and Microbiology Laboratories.
- **Contaminated Fuel (Bad Gas) Issue** - conduct laboratory tests on gasoline from petrol stations island wide in response to complaints from consumers that substandard gas was being received resulting in damage to their engines, and contribute to the discussions to improve the regulatory framework for this product.

Main Achievements during FY 2015/2016

- Publication of 57 standards (44 for products; 13 for services) for areas including: agriculture, tourism, textiles, logistics (shipping), emergency management and sporting equipment/infrastructure.
- Launched 6 sports and recreation standards to promote safety in sports in educational institutions, communities and in the professional sphere.
- Attainment of accreditation to ISO/IEC 17025 from the Jamaica National Agency for Accreditation (JANAAC) for 16 food tests conducted by the Packaging, Chemistry and Microbiology Laboratories.
- Attainment of certification to ISO 9001:2008 from the British Standards Institution (BSI).
- Successful implementation of the Capacity Building in Jamaican MSMEs in the Agro-Processing Sector Project.
- Successfully negotiated financial support of J\$6M from the Development Bank of Jamaica (DBJ) towards the implementation of the Accreditation of the Industrial Training Unit and Certificate Programmes Project.
- Support for the development of MSMEs included:
 - Provision of discounts valued at a little over J\$1.6M on selected services (laboratory testing, calibrations, label assessment, canned seam analysis, and registration of

establishments) to MSMEs under collaborative agreements with the Jamaica Agro-Processors Association, Jamaica Business Development Corporation and JAMPRO (Export Max II Programme).

- Signing of MOU with DBJ to support the implementation of the Voucher Assistance Programme. The BSJ is providing training and related business support services to MSMEs to enable them to achieve improved and acceptable business standards.
- Renewal MOU with the Jamaica Manufacturers' Association in support of the BSJ/Business Partnership Programme.
- Increase in the number of companies certified by the NCBJ to ISO 9001 from 6 to 7 (comparison made with the previous financial year). As at 31 March, 2 companies at various stages of the certification process.
- Signing of MOUs with The Mico University and UTech, Jamaica for the incorporation of metrology in their science curriculum.
- As Chair of the International Network for Bamboo and Rattan Council (November 2014-17), the national INBAR Focal Point was influential in ISO's creation of a technical committee on bamboo and rattan.
- Signing of MOU with UWI in support of the Bamboo Research Project.
- Facilitate the development of the bamboo products industry, including the following:
 - export of 70,000 lbs of USDA certified organic bamboo charcoal to the USA,
 - export 14,800 lbs of bamboo to St. Maarten,
 - local manufacture of a bamboo charcoal kiln, and
 - commencement of the Peckham Bamboo Project in Northern Clarendon (officially launched in May 2015), which is being financed by OAS funding of US\$130,000 (J\$15M).
- Implementation of a public education programme targeting block manufacturers and end-users of blocks island-wide. Information was shared on the requirements of the standard for hollow concrete blocks, the enforcement actions for non-conformance, and the list of registered block manufacturers.

Principal Focus for FY 2016/2017

- Continued execution of the projects and other activities listed in section 4.
- Provision of Assistance to businesses to identify and implement appropriate standards solutions.
- Facilitate the adoption of 50 standards for areas such as: agriculture, food processing, logistics hub, building and construction, and management systems.
- Promote the implementation of key standards in the areas of agriculture (organic), and road safety.
- Seek accreditation from JANAAC for 15 tests conducted by the Chemistry, Microbiology and Cement Laboratories.
- Collaborate with stakeholders to develop and implement a system for the pre-packaging of retail sugar.
- Collaborate with stakeholders on the development of an institutional framework for the organic industry.

- Participate in a Ganja Track and Trace Pilot Project to illustrate that track and trace technology is feasible to support the regulatory framework for the ganja industry and to identify and establish the intellectual property rights for traditional ganja growers.
- Training of personnel in food exporting companies in the implementation and maintenance of food safety systems (to be coordinated by the National Food Safety Modernization Secretariat & Task Force).
- Seek to expand the accreditation scope of the NCBJ to offer organic and food safety system certification services.

NATIONAL COMPLIANCE REGULATORY AUTHORITY (NCRA)

In July 2015, Cabinet approved the separation of the Regulatory Division of the Bureau of Standards Jamaica (BSJ) to establish the National Compliance Regulatory Authority (NCRA). This separation is part of the Strategic Public Sector Transformation Project to remove an inherent conflict of interest whereby the BSJ spearheads the development of compulsory standards which it also enforces.

The change will result in conformance with the WTO/TBT Agreement. It will also comply with Caribbean Regional Organisation for Standards and Quality as well as satisfy numerous requests by local processors. Operationalization of the NCRA commenced on 4 January 2016 with the engagement of the newly appointed Chief Executive Officer (CEO) and the establishment of an Advisory Board.

There will be an 18-month transitional period moving towards full legal independence. During this period the requisite legislative framework will be developed and submitted for consideration. In addition, during the period, the Ministry of Industry, Commerce, Agriculture and Fisheries is expected to monitor and evaluate the efficacy of the current firewalled arrangement to determine the oversight and administrative mechanisms required for the operation of a separate and independent regulatory authority under its own statute.

The NCRA is responsible for registering food processing establishments, legal metrology, inspecting goods at the ports of entry and in the domestic market for compliance.

Mission

To effectively and efficiently protect consumers from harmful and deceptive goods and fair trade practices while encouraging innovation and entrepreneurship through: public education, enforcement and a robust engagement of stakeholders with a highly motivated and competent staff.

Objectives

- To ensure that processed food establishments are assessed for compliance with the applicable regulations
- To protect consumers, punish violators and deter violations through enforcement activities
- To ensure that prescribed foods are sampled and approved prior to sale
- To assess the compliance level of regulated products with the applicable regulations and standards at the ports of entry, utilising a risk based approach

- To assess the compliance level of regulated products with the applicable regulations and standards in retail and wholesale outlets in the domestic market
- To ensure equity in trade through undertaking legal metrology activities
- To build awareness about applicable regulatory requirements to regulated entities
- To improve organizational efficiency and effectiveness for the consistent delivery of service quality through specialised training
- For NCRA to achieve accreditation to ISO/IEC17020 Standard - Conformity Assessment-Requirements for the operation of various types of bodies performing inspections

Main Activities FY 2015/2016

COMPLIANCE ACTIVITIES	YEAR TO DATE
PORTS OF ENTRY	
Total # of Visits	5,307
# of Consignments Inspected	2,614
# of Consignments Detained	61
# of Samples Taken	94
# of Units Collected	137
SITE INSPECTIONS	
Total # of Visits	1,771
# of Consignments Inspected	1,627
# of Consignments Detained	75
# of Samples Taken	621
# of Units Collected	1,778
DOMESTIC MARKET	
Total # of Visits	2,948
# of Products Inspected	100,762
# of Withdrawals	2,000
# of Units Withdrawn	54,970
# of Samples	38
# of Units Collected	93
LEGAL METROLOGY	
Total # of Visits	1,395
# of Scales Tested	2,856
# Petrol Nozzles Tested	4,231
Tanker wagons Calibrated	62
High Volume Meters Calibrated/Tested	114
Storage Tanks Calibrated	3
BLOCK MONITORING	
Total # of Visits to block making establishments	620
FOOD ACTIVITIES	
Total # of Visits	2,435
# of Factories Being Monitored	743
# of Factories Registered	478
# Closed/Temporarily out of operation	112
# of Samples Taken	744
# of Units Collected	4,877

Strategic Goal	Performance Indicators (Regulatory Division/NCRA)	Annual Target April 2015 – March 2016	Achievement (as at March 2016)
Enable health safety and fair trade	% of food establishments that meet registration requirements (Goal 1)	≥75%	76%
	% of block manufacturing plants that meet registration requirements (Goal 1)	≥60%	18%
	% of registration certificates for processed food establishments issued within 5 days (Goal 1)	≥90%	97%
	% of approval certificates issued within 3 days for processed food (Goal 1)	≥90%	81%
	% level of compliance of imported products with applicable requirements (Goal 1)	≥95%	97%
	% level of compliance of products in the domestic market with applicable requirements (Goal 1)	≥92%	98%
	% level of compliance of weighing and measuring devices verified (Goal 1)	≥95%	97%
	% of verification and calibration certificates for weighing and measuring devices issued within 10 business days (Goal 1)	≥90%	75%

Bad Gas

Sampling of petrol and ethanol at marketing companies' storage facilities was done by NCRA Inspectors in an effort to ascertain the cause for the high level of complaints from motorists as it related to fuel injector system problems.

Over 100 tests samples were pulled by the NCRA and tests were conducted by the BSJ Chemistry Lab, but results did not produce any conclusive evidence as to the source of the contaminated/substandard petrol that entered the local petroleum trade resulting in the problems experienced by motorists.

Test results were submitted to the Petroleum Trade Reform Committee (PTRC) to assist with their assessment of issues in the trade and was incorporated in a report they submitted to the Ministry of Science, Energy and Technology.

Principal Focus for FY 2016/2017

- Build and strengthen partnerships with our industry stakeholders through continuous engagement and focused analysis of their needs requirement.
- Establish the NCRA as a fully independent agency of MICAF. Currently, there are three (3) consultancies working with the NCRA: Legal Review (not yet engaged), Change Management and Branding. They are scheduled for completion by the 3rd quarter of the

financial year and steps are being taken to implement the recommended measures as they are identified and agreed.

The Objectives and targets for selected strategies to be pursued during the period 2016-20 are outline below:

Objective	Performance Indicators	Annual Target April 2016 – March 2017
To ensure fair trade and consumer protection	% of food establishments that meet registration requirements (Goal 1)	≥75%
	% of registration certificates for processed food establishments issued within 4 days (Goal 1)	≥95%
	% of approval certificates issued within 3 days for processed food (Goal 1)	≥90%
	% of targeted Inspections conducted at ports of entries and importers' premises	100%
	Detention notices issued for non-compliant products at port of entries and importers' warehouses	100%
	# of blocks sampled (Goal 1)	≥384
	# quarries/distributors sampled for quality of aggregates	≥36
	# of weighing and measuring devices tested and verified	≥6,400
	# of pre-packaged goods tested and verified	≥4,200
	# of LPG cylinders tested and verified	≥1,180
	# of samples of petroleum base stock from distribution points (Petrojam (Kgn & Mo Bay); Jamaica Petroleum Terminals Ltd.; Rubis/Rockfort	≥48
	# of samples of ethanol from distribution points (Petrojam (Kgn & Mo Bay); Jamaica Petroleum Terminals Ltd.; Rubis/Rockfort	≥48
	% of verification and calibration certificates for weighing and measuring devices issued within 10 business days (Goal 1)	≥90%

JAMAICA NATIONAL AGENCY FOR ACCREDITATION (JANAAC)

Aims and Objectives

JANAAC's mandate extends to the provision of accreditation services to CABs namely: public and private sector laboratories, Inspection bodies, and Certification bodies; technical training for assessors and laboratory personnel; as well as provision of appropriate technical information on accreditation to its stakeholders. The Agency has three mission critical objectives, namely:

- Assist in trade facilitation by ensuring that its accredited CABs are recognized globally by trading partners. This is enabled through JANAAC's Signatory status to the Mutual Recognition Arrangements (MRA's) with the International Laboratory Accreditation Cooperation (ILAC), and the Multilateral Agreement (MLA) with Inter-American Accreditation Cooperation (IAAC).
- Enhance competitiveness by encouraging Jamaican entities to produce goods of consistently high quality that are compliant with international standards; international trade agreements, such as the World Trade Organisation's Technical Barrier to Trade Agreement (WTO/TBT); as well as international best practice and local regulations. Through the use of accredited CABs, Jamaican exporters will be able to test their products once in Jamaica and these test certificates will be accepted everywhere, thus preventing Jamaican manufacturers/exporters incurring additional costs for retesting in their target markets.
- Support consumer wellbeing through improved stakeholder confidence in the quality and integrity of goods and services supplied.

Establishment of the Agency

Jamaica National Agency for Accreditation was incorporated in March 2007, JANAAC officially began operations on April 1, 2008 in conformance with Cabinet Note 322/MITEC 20/06, through which Cabinet gave its approval for the establishment of JANAAC at its meeting of September 11, 2006. There is no enabling legislation, however as a Public Body, JANAAC is subject to the Public Bodies Management and Accountability (PBMA) Act (2010), The PBMA Amendment Act (2011) and the Financial Administration and Audit Act.

Major Activities during FY 2015/2016

- Extension of JANAAC's Medical Scope Accreditation Project
- Inspection Body Accreditation New Product Development Project
- Proficiency Testing Provider
- Improve project efficiencies
- Increase client pool
- Acquisition of a building for JANAAC's Corporate Offices

Major Achievements during FY 2015/2016

- In September 2015 JANAAC's signatory scope to the ILAC MRA was extended to include Medical Laboratory Accreditation to the ISO 15189 standard. This is another record feat for JANAAC and a strategic one for Jamaica as it will significantly boost international confidence in our ability to deliver world class medical tourism services.
- JANAAC holds the distinction of being the only internationally recognized accreditation body in the English-speaking Caribbean.
- The Agency awarded accreditation certificates to eight (8) Labs up to the 2013/14 FY this is compared with the award of seven (7) certificates in the 2015/16 FY
- JANAAC awarded two regional accreditation certificates to CABs in Guyana. The Guyana Rice Development Board Central Laboratory for ISO/IEC17025 and the Eureka Medical Lab for ISO15189.
- JANAAC now has a presence in five CARICOM states.
- In June 2015, JANAAC received approval from the ILAC for the registration of the Mutual Recognition Arrangement (MRA) Mark in Jamaica. This removes the need for verification of status through the visual recognition of the international acceptance of our accredited CABs.
- JANAAC is now poised to deliver its newest service offering – inspection body accreditation, having now qualified inspection body assessors and concurrently has started sensitizing its potential customer base. Inspection Body accreditation is a critical service which will enable our inspection bodies to fully support economic growth.
- Two JANAAC team members were trained in July 2015 as peer evaluators to the Inter-American Accreditation Cooperation (IAAC). These peer evaluators assist in evaluating other accreditation bodies in the Americas.
- In June 2015 the Agency launched its Accreditation Ambassadors Programme using Jamaicans with a wealth of social capital, national and international influence to promote the benefits of accreditation.
- In August 2015 JANAAC's enhanced website was re-launched
- In September 2015 the Agency introduced its newspaper feature "Accreditation: The Business Advantage" which solicits testimonials from public and private sector entities impacted by the services of accreditation. Articles have been published on the first Wednesday of every month in the Business Gleaner.
- Significant improvements have been effected to the company's management and accountability systems including the introduction of the Balanced Scorecard Management System, and new management reporting and monitoring systems.
- Throughout the period 2012-2015, JANAAC has recorded significant increases in revenue and profitability, thus surpassing its annual financial targets over the period. In this regard, the Agency has achieved impressive average operating ratios of 63.47%, and has successfully managed to keep its operating costs within budget.
- Provision of targeted training programs - one regional Assessor training program amongst others delivered.

Principal Focus for FY 2016/2017

- During the 2016/17 financial year, JANAAC will further diversify its offerings and expand its market to include more regional clients. Likewise, the Agency will aggressively pursue local CABs, as part of its strategic priorities to grow revenues organically. Also to support its revenue growth strategy, in the financial year 2016/17, the Agency will introduce Inspection Body Accreditation services.
- JANAAC will continue to build the capacity of the organization to deliver expert, competent and customer-centric service by implementation an integrated client relationship management system. In addition, The Agency will develop and maintain an efficient and effective accreditation process by streamlining key processes within the accreditation cycle, as well as implement a robust performance management system.
- JANAAC has taken a strategic decision to position itself within the local and regional business environment to leverage available opportunities to strengthen its brand and grow revenues. As part of its growth and development thrust, the Agency embarked on a medium term strategic plan in the 2015-16 fiscal year which will enable the introduction of a suite of novel accreditation service offerings, and concomitant improvements to the organization's service delivery channels, including the office facilities in which the JANAAC's team operates.
- JANAAC's key strategic initiatives, projects and targets for the medium term will also enable the Agency to achieve and maintain financial sustainability; increase visibility among its key stakeholders and potential clients; as well as build public awareness about the importance of accreditation to enhancing consumer confidence and trade facilitation; and enhance the Agency's operational efficiency and effectiveness.

Industry and Business Development

CANNABIS LICENSING AUTHORITY (CLA)

Aims and Objectives

The main focus of the CLA is to foster the growth, development and orderly regulation of a legal marijuana (ganja) and hemp industry in Jamaica, including the use of the plant and/or derivatives thereof for medical, therapeutic and scientific purposes. This must be done consistent with Jamaica's international treaty obligations regarding the cultivation, production, use and export of narcotic substances.

The role of the Authority is also clearly defined in Clause 9A of the Dangerous Drugs Act (DDA).

Establishment of Agency

The CLA was established under the Dangerous Drugs (Amendment) Act, 2015, which was:

- Confirmed by Cabinet Decision # 3/15 dated January 19, 2015
- Passed in Parliament on February 25, 2015
- Signed by the Governor General Patrick Allen on March 20, 2015
- Officially came into operation on April 15, 2015.
- Interim Regulations to support the Act and allow for licensing were officially gazetted on May 5, 2016.

Major Activities and Achievements during FY 2015/2016

Development of Regulations

- The CLA received donor support to fund the development of recommendations for the draft regulations. The consultancy was executed between July and September 2016.
- In late January, the draft interim regulatory structure was approved by the Ad-Hoc Sub-Committee of Cabinet on Ganja and received approval for the structure proposed.
- In the ensuing month regulations were drafted with input from Board members building on the recommendations that were made by the consultants.
- Full regulations were approved and gazetted in May 2016, and application forms shared with interested applicants.

Communications and Public Education

- In February 2016, the Authority signed a contract to establish the Authority's brand entity. This also allowed for development of a website and application forms for the licensing regime.
- A communications consultant was contract at the end of March 2016 to further drive the information being disseminated to key persons in the industry.

Operational Establishment of the Authority

- The Board of the Authority was named in May 2015 and the first meeting convened in June 2015. JAMPRO was asked to offer Secretariat support, and all of the work undertaken during the year was undertaken by JAMPRO and the Board of the Authority.
- An organizational structure was developed and submitted to the MIIC in October 2015. In February 2016, a formal request was made for Job Descriptions to be developed for submission and in a meeting with the MOF it was agreed that priority would be given to the Authority's application for posts. A total of seven (7) posts were approved and the recruitment process for these posts is expected to be completed in July 2016.
- A number of meetings were held during the year with external partners required to ensure the smooth establishment of the industry. These include:
 - Financial Investigations Division
 - National Environment and Planning Agency
 - Jamaica Constabulary Force
 - National Land Agency
 - Companies Office of Jamaica

Principal Focus for FY 2016/2017

The key focus activities for the Authority will be:

- **Applications Processing and Issuing of Licensing:**

As at the start of June the Authority is officially in a position to start accepting applications. The secretariat is currently fine-tuning the element of the applications processing, including the finalisation of discussions with the Financial Investigations Division, the Jamaica Constabulary Force, and other related entities.

- **Further Establishing of the Authority:**

The Authority will finalise the process of recruiting the seven approved posts by July 2016 and is expected to request the approval of other critical posts. With these persons in place the Secretariat function will shift from JAMPRO and the Authority can be formally established. In addition the Authority is expected to complete a strategic business plan and 5-year financial projections, which was started earlier in the year.

- **Other Regulations:**

The Interim Regulations that were promulgated only covers the licensing regime for ganja. Other regulations will have to be developed for hemp, import/export processes and further refinement of the interim regulations.

- **Address Outstanding Industry Issues:**

- **Banking Support:** The industry stands to face significant challenges in banking the licensed entities. The rules surrounding Know Your Customer requirements and the risk of funds from the illicit trade comingling with the licit trade is expected to impact corresponding banking issues, particularly with the United States where the handling of ganja remains wholly illegal.

- **Support for Small Farmers:** An ecosystem of support will be needed to ensure that the small traditional farmers are sufficiently incentivised to shift from illegal trade to the legal. Key Government entities such as DBJ, NLA and RADA will need to be mobilised to ensure that the framework for their success is in place. Already the Authority has requested endorsement of the Ministry of Finance for the deferment of fees for farmers under an acre.
- **Tax Structure:** Specific recommendations were made by the BOTEK Consultant on the type of taxes that could be considered. It has been discussed and largely agreed within the Authority that a tax stamp on cultivated products (which are bagged) would be implemented and a SCT on the processed product. The Authority has requested the position of the MOF for this to move forward.

- **Building Strategic Partnerships:**

The Authority will be seeking to better understand the regulatory aspect of the industry and have been invited by the Washington Office for Latin America (WOLA) to undertake mission to Colorado and Washington D.C to meet with key stakeholders in the Cannabis Industry. This mission is to take place July 2016.

HAZARDOUS SUBSTANCES REGULATORY AUTHORITY (HSRA)

Aims and Objectives

The **Nuclear Safety and Radiation Protection Act** was passed by the Senate on July 17, 2015. The Act creates the legal framework for the regulation of activities, practices, apparatuses and facilities involving ionising radiation and nuclear technology. Objectives of the Bill were: to protect radioactive sources from misuse that may result in harm to people or the environment; to promote radiation protection principles and an effective nuclear safety culture; to provide compensation for damage, loss and injuries caused by ionising radiation; to allow for the beneficial and peaceful uses of nuclear technology; and to facilitate Jamaica's compliance with international obligations arising under the conventions.

The Act names a **Hazardous Substances Regulatory Authority (HSRA)** as the responsible Agency for executing the objects of the Act. The Authority will not only cover ionizing radiation but also biological and chemical hazards. The scale and scope of this regulatory Authority will not lend itself to be part of the BSJ or the NCRA since the legislation establishes it as a body corporate. The HSRA is now an Agency under the Minister of Industry, Commerce, Agriculture & Fisheries (MICAFA).

Major Activities and Achievements during FY 2015/2016

The following are activities which have been conducted to date for the establishment of the HSRA:

- i. Training of one officer in radiation safety and security and inspection protocols; as well as the development and management of the authority and its regulatory program

- ii. Review and submission of official reports to Jamaica Customs regarding containers being held at the ports due to the detection of radiation levels above background level.
- iii. Preparation, review and approval of various forms, certificates, plans and other documents for the HEU to LEU conversion Project at the International Centre for Environmental and Nuclear Sciences (ICENS).
- iv. Participation of a BSJ officer in review meetings with legal officers from relevant Ministries to prepare drafting instructions and technical content for the Regulations.
- v. The BSJ received J\$1,000,000 from the MICAF to prepare temporary office space to house the HSRA in the **first year**. This area is being prepared for occupancy by the end of July 2016. Administrative Services (Accounts, Maintenance, HR, and Security) is to be outsourced to the BSJ in that period also.

Principal Focus for FY 2016/2017

A proposed Budget of **J\$79,848,320** for the current Financial Year was submitted for approval. This is expected to cover a skeleton staff for the radiation protection aspect of the HSRA in year one as the entity is being developed. The HSRA would be **restricted** in its function, based on this bare bones structure, to perform only the following functions:

- i. Preparation of a national inventory of radioactive sources.
- ii. Training of key regulatory personnel involved in the interaction of radioactive
- iii. Establishment of a monitoring mechanism for radioactive sources within the borders of Jamaica (inclusive of equipment being imported for health facilities)
- iv. Representation at national, regional and international levels on matters related to radiation protection, and the safety and security of radiation sources.
- v. Improving the implementation of the IAEA's Code of Conduct for the safety and security of radioactive sources.
- vi. Managing Jamaica's accounts in IAEA's electronic platforms.

The capacity of the HSRA to regulate Biological and Chemical Hazardous materials will not be accounted for in the first year as the legal framework is to be developed to support those functions.

Based on the foregoing, the MICAF needs to put the necessary infrastructural support in place to have the Authority up and running in the shortest possible time including the appointment of a Director General and a Registrar, and recruitment of relevant staff for the daily operations of the HSRA.

JAMAICA BUSINESS DEVELOPMENT CORPORATION (JBDC)

Mission and Goals

JBDC is a limited liability company which was established in 2001. The Organization's mission is to pursue developmental policies that foster sustainable modernization and growth in the productive sector, effective modernization of the business environment, cost-effective delivery of technical and marketing services through highly committed, competent and motivated employees. The main objectives of the JBDC are as follows:

- To facilitate the development of a dynamic micro, small and medium enterprise sector (MSME)
- To ensure growth through assistance in the modernizing of companies and developing innovative products & sectors
- To develop solution oriented services for the productive sector by providing workshops, business start-up kits and modernization kits.
- To increase the awareness and desire of the public for authentic Jamaican products
- To improve the overall efficiency of the JBDC through the development of human resources

Major Activities during FY 2015/2016

- Creating an enabling business environment
- Enhancing business development support
- Fostering a culture of entrepreneurship
- Increasing finance to the sector
- Tackling Cross-Cutting Issues
- Improving operational governance, effectiveness, efficiency and viability

Major Achievements during FY 2015/2016

- **Client Interventions** – JBDC served over 4637 clients in areas of business development and technical services including business counselling, facilities assessment, business plan writing graphic services, product development and incubator services during the FY ending March 2016; approximately 39% of which were first time clients.
- **Market Access and Penetration** - Things Jamaican continues to facilitate market penetration and expansion within the sector. Achievements included:
 - 107 Marketing Consultations (Screenings) were completed for FY 15-16, 21% of the clients gained market entry.
 - Facilitated suppliers revenue of approximately \$19.60M⁴
 - Things Jamaican participated in 10 external promotional/trade events which resulted in distribution lead and marketing opportunities for suppliers'.

⁴ The closure of the Things Jamaican location in Montego Bay and the temporary closure of the Norman Manley Airport location impacted the suppliers' revenue earned for the year.

- **Training and Development** – 41 training sessions were completed for the year in areas of business development and entrepreneurship, product development, proposal writing and research techniques.
- **Business Formalization** – JBDC facilitated registration of approximately 708 businesses with the Companies of Jamaica during the period.
- **Mobile Business Clinic** – Eleven Mobile Business Clinics have been held since November 2014 benefitting over 2183 persons. The objective of the Mobile Business Clinic Initiative is to decentralize the provision of business development services to small businesses located in non-urban communities via a mobile office offering a suite of services and assistance that is integral to MSME growth.
- **Research and Development** - In order to increase the level of data and information resources available to inform policy and development of the MSME sector, the JBDC has been engaged in a number of Research initiatives. Activities completed during the reporting period include:
 - Finalizing the MSME Needs Assessment Survey Report a national survey of the state of the MSME sector. The full report will be published during the first quarter of FY 2016-2017
 - Execution of the **National Employee Engagement Survey**. A total of 538 employees representing organizations from all sectors island-wide have participated in the survey as at February. The full report will be published FY 2016-2017.
- **Facilitating finance to the Sector** - The Grant Proposal Writing Workshop is JBDC's response to organizations need to access funding to implement critical developmental projects geared towards national development. Over \$76 Million in Grant Funding have been received by participants participating in JBDC's Proposal Writing Workshops since November 2013. Approximately 147 individuals representing public and private sector entities were trained during the FY.
- **Small Business Expo 2015** - The eighth annual Small Business Expo was held in May 2015 under the theme "*Business Linkages-Connecting Jamaica to World.*" Approximately 360 patrons attended and participated in the event.
- **Global Entrepreneurial Week 2015** - In celebration of Global Entrepreneurial Week the JBDC hosted a series of activities during the week of November 16-21, 2015 under the theme 'Going for Growth.' Over 813 MSMEs and stakeholders from the sector participated in the activities.
- **Other Projects and Developments**
 - **JBDC/IDB Training Project** - The IDB and JBDC signed a US\$150,000 agreement as part-funding for a US\$236,974 project – "*Testing the Viability of an Innovative Business Training Method for Entrepreneurs in Jamaica*". The outcome of this project is to test an innovative entrepreneurial training program for micro-small-and medium entrepreneurs using experimental methods the results will contribute to generating empirical evidence on alternative, effective entrepreneur training programs so that public and private entities in the region, including MIF, have proven alternatives to non-effective traditional training programs.

- **DBJ IGNITE Project** which is a grant funding window that is available to start-up MSMEs (2 years and younger) that enables them access to a maximum of J\$4 Million in grant funding. JBDC is currently providing handholding to 26 MSME seeking to access the grant.
- **North Coast Craft Revitalization Project** – NCCRP is funded by the Tourism Enhancement Fund with the aim of improving the capacity of craft products Trelawney, St. Ann, St. James. Approximately 100 producers have benefited from training, technical and product development support and marketing.
- **The Jamaica Stock Exchange (JSE) Business Development Project** - The JSE selected the JBDC as a Consultant to deliver capacity building services to a minimum of 15 companies listed on the Jamaica Junior Stock Exchange Market under a project that is being funded by IADB.

Principal Focus for FY 2016/2017

- Continued execution of client interventions through business development, technical and marketing support.
- Launch of the Things Jamaican Jamaica Harvest Line of agro-foods products
- Continued negotiation with hoteliers re: the Things Jamaican Pop-up Store Concept and the subsequent execution
- Continued distribution and decentralization of business development information and support through the Mobile Business Clinic Initiative, Small Business Expo and Global Entrepreneurial Week Events
- Execution of the JBDC/IDB/DBJ - Testing the Viability of an Innovative Business Training Method for Entrepreneurs in Jamaica Project.
- Continued facilitation of financing support through the execution of the Proposal Writing Intervention and the recently restructured Financial Support Services Unit
- Execution of a Mobile Money Survey to gain MSME perspective on the Mobile Money Services and the execution of a Corporate Service Needs Survey.
- Launch of the JBDC MSME Research Initiative

MICRO INVESTMENT DEVELOPMENT AGENCY (MIDA)

Mission and objectives

Mission:

The Micro Investment Development Agency (MIDA) exists to promote sustainable growth in the micro enterprise sector through the provision of financial services, networking with partners to promote and facilitate the delivery of non-financial services to those wishing to start or expand their businesses so as to create employment and wealth through a highly efficient and well-motivated staff.

Objectives:

The overall objective of MIDA is to promote, encourage and facilitate the development of micro, small and medium-sized enterprises in Jamaica as a principal means of achieving improvement in the economic well-being of individuals who desire to get into self-sustaining economic activity.

Establishment of the Agency

Micro Enterprise Development Agency (MEDA) was incorporated under the laws of Jamaica on July 4, 1991 as a limited liability company (limited by shares). It subsequently changed its name to Micro Investment Development Agency (MIDA) on November 18, 1991. MIDA had an initial share capital of 1000 @ \$1 each.

MIDA is not financed through the consolidated fund but rather from profits from its operation. Apart from the initial share capital of \$1,000 MIDA obtained funding through the issue of a \$100 million, 10 years bond to the private sector, which was successfully repaid. The agency also received grants of \$238 million and loans totaling \$185 million.

In addition, the under-mentioned funds were/are managed by MIDA and which provided the source of funds for its loan program to its Approved Lending Agencies (ALAs) and from which it earns a fee.

Project Managed by MIDA

Projects	Amount Received (\$M)
The Social Economic and Support Programme - Poverty Alleviation Programme S.E.S.P.) Renamed (Constituency Development Fund)	100.00
The Jamaica Bauxite Institute Micro Enterprise Programme (JBI)	5.00
The GOJ/E-U Micro Enterprise Programme(MIIC) (GOJ/EU)	40.00
The Poverty Alleviation Programme (MOF) Skills 2K	0.65
Government of Jamaica/Government of Netherlands (GOJGON)	240.00
Total	385.65

Major Activities for FY 2015/2016:

MIDA, through its network of Authorized Lending Agencies, continues to:

- Provide wholesale loan funds to the Micro Finance Organizations in the MSME Sector.
- “Provision of funding, as a wholesale institution, to enable MSME entrepreneurs to obtain financing on a timely basis and on satisfactory terms”.
- Collect outstanding receivables/delinquent loans through its DRUM unit.

Major Achievements for FY 2015/2016:

	Inception to (March 2016)	(April 2015-March 2016)
Total Disbursed by MIDA	\$3.32B	\$155.45M
Total repaid	\$2.77B	\$136.08M
Job Created:	63,578	2,442
Enterprise Funded:	35,582	1,668

Principal Focus for FY 2016/2017:

The agency will continue to wholesale available funds to the MSME sector through the MFOs albeit a miniscule amount of what is demanded by them. However the fees currently earned from this source cannot sustain the organization and therefore there is an initiative afoot for the merger of MIDA, JBDC & SSF so as to obtain better synergy and efficiency. Work on this effort is in its infancy stage and we await a fulsome mandate in the near future.

SELF START FUND (SSF)

Aims and Objectives

- To be the government's premier lending institution having a competitive advantage over our counterparts in the financing of the MSME sector.
- To close the gap in the number of MSME clients being able to access affordable funding.

Establishment of the Agency

- The Self-Start Fund (SSF) was incorporated in October 1983 with the support of the United States Agency for International Development (USAID). The SSF is a company limited by guarantee without share capital and was established as a non-government organization (NGO).
- The SSF was initially financed from Caribbean Basin Initiative (CBI) reflow funds. A condition for use of the reflow resources was the establishment of an entity to be operated as a non-government and commercially viable enterprise that was controlled by a Board of Directors.

Major Activities during FY 2015/2016

- SSF has been focused on collection to reclaim some of the outstanding funds from delinquent clients over the years.
- SSF has a few delinquent clients with assets that can be realize to repay the loan, we have been advertising these assets mainly property.

Main Achievements during FY 2015/2016

- SSF lack of funds has limited our progress and achieving our goals.
- SSF has not been lending hence additional interest income cannot be realized and our visibility in the MSME market has become increasingly less.

Principal Focus for FY 2016/2017

- Our focus continues to be the recovery of outstanding sum to the company with the help of the courts and the disposal of assets used to secure the loans.
- We are trying to remain visible in the MSME sector and as such we have tried to attend workshops, or seminars which are free to the company which will help us to remain visible
- We have been using various methods and strategy to coerce our clients into paying on their loans no matter how small the amount.

Agriculture and Fisheries

BANANA BOARD

Aims and Objectives of the Banana Board

The Banana Board is a statutory body established October 1, 1953 under the *Banana Board Act*, which is aligned with the *Banana Insurance Act* of 1946. The Board's affairs are governed by a Board of Directors, which is comprised of eight (8) members, who are appointed by the Minister of Agriculture and Fisheries (MOAF). The Banana Board has been implementing *The Banana Board Grant Contract for Technical Services 2*, a project of the Jamaica Banana Accompanying Measures (JBAMs) Programme, which is being supported by the Government of Jamaica (GOJ) and the European Union (EU).

The overall objective of the JBAMs programme is to combat poverty and improve revenues in the banana dependent areas by improving the productivity and resilience of small farmers, and strengthening the link between small farmers and markets.

The specific objectives of the programme are to increase production and productivity of banana and plantains, in order to meet demand and mitigate the threat to the food security.

Mandate of the Banana Board

The overall mandate is to implement the National Adaptation Strategy (NAS) as documented in the *Overall Country Strategy for the Banana Industry 2010 (revised 2012)*. This strategy is based on the National Banana Policy for Jamaica 2009, which was formulated after widespread consultations with stakeholders in the industry and reflected a commitment to the sustainable development of the industry. The objectives of the NAS support the vision, goals and principles of the *National Policy*. *The strategy objectives are: to increase competitiveness, promote diversification and provide a social safety net to assist persons and their dependents to adjust to the decline in the industry.*

The immediate mandate or aim is to implement the European Union-funded Jamaica Banana Accompanying Measures Programme (JBAMs) as the Government of Jamaica's *strategic priority*.

Major Activities

Banana Board's Main Functions

The regulatory functions of the Board include:

- Promoting the interest and efficiency of the banana industry and leading in the development of the industry by implementing the *National Banana Policy 2009* and *Overall Country Strategy for the Banana Industry 2012*.
- Establishing, monitoring and audit of certification standards for the industry (banana farm production systems, products and banana related agri-businesses);

- Assisting farmers to meet the standards;
- Granting export licences on the basis of standards;
- Research and development for the Banana Industry;
- Developing bananas and plantains wholly and partially immune to disease;
- Providing certified planting materials to banana farmers;
- Controlling and eliminating any disease affecting bananas;
- Providing specialized extension services to the Banana Industry;
- Identifying infrastructure needs in the Industry;
- Administering the Banana Insurance Fund;
- Managing the Banana Industry Catastrophe Fund;
- Development and cost recovery measures for the Banana Board;
- In collaboration with the Ministry, crafting and executing short-term banana campaign;
- In collaboration with the MOAF, conduct market/demand study of the Banana Industry

Banana Board's Programmes and Activities

The Government of Jamaica is revitalizing the Jamaica Banana Industry, which had been impacted by various challenges over the years. Challenges included the seven major storms in five years, which resulted in the cessation of major exports to the United Kingdom in 2008. Suspension of exports affected banana farm families in the traditional banana parishes of Portland, St. Mary, St. James and St. Thomas. Since then the industry has focused on growing the very lucrative and domestic market estimated at J\$20B and penetrating overseas markets in North America and the Caribbean. Only an estimated 79% of the 70,000 tonne demand or current domestic consumption of banana was being met by local production. Approximately 21% was being supplied by imported banana by-products and there is further unmet demand for Jamaican bananas and plantains in the overseas markets.

The Banana Board and with support from the European Union-funded Jamaica Banana Accompanying Measures Programme (JBAMs) has been implementing the Government of Jamaica's strategic priority to increase production and productivity of banana and plantains, in order to meet demand and mitigate the threat to the food security. Strategies had increased production and productivity and included:

- The application of science, technology and best practices in crop production, harvesting storage, transportation and by-product manufacturing.
- Multiplication and distribution new high yielding banana and plantain varieties.
- Implementing climate smart and resuscitation programmes for windstorms and drought.
- Implementing Banana Export Expansion Programme (BEEP).

Achievements

Major Achievements include the following:

Increased Banana Production and Productivity

In spite of hurricane Sandy in 2012 and two consecutive years of drought in 2014 and 2015, banana production and productivity had increased successively over the past three years, due to

the implementation of appropriate technical and economically viable strategies. Banana production was 54,576.2 tonnes in 2015, 53,034.4 tonnes in 2014 and 33,294.8 tonnes in 2013. *The annual banana production in 2015 was 17% greater than the respective annual total of 46,600 tonnes for the 2011 base year and 3% above 2014, in spite of severe drought in two consecutive years.*

Productivity in 2015 was 14.5 tonnes per hectare for banana. This was 5.2 T/Ha or 56% above 2011 banana productivity level of 9.3 T/H or 55% increase in productivity.

Distribution of Seedlings

The FHIA varieties being multiplied and distributed have a lower cost of production and higher yields than the common commercial varieties. They are resistant to black Sigatoka disease and produce 30 to 50% greater yields. They are softer, so they cook very quickly, peel easily without much stain, which makes them ideal for processing as chips and other by-products.

The Board has a target to distribute 200,000 seedlings or suckers of new and common varieties over four years. So far over 35,000 seedlings have been distributed. We expect to complete that target over the remaining two years of the project, with the transfer of Cuban bio-technology and the establishment of a small tissue culture bio-factory.

Technical Servicing and Training:

The Board was exceeding all of its obligations to provide sampling and testing services, precise recommendations for fertilizers and disease control treatments, as well as training farmers and entrepreneurs, farm visitations, field days, farm-field schools, other group dynamics and technical support to farmers.

Disease Control

Moko Disease was monitored, diagnosed by laboratory tests and treated drastically by killing infected and at risk plants. This service had eliminated the disease from all parishes except St James where it is infrequently diagnosed and confined only to a very small area. The disease was found on only two farms in 2015, with only 2.3% of plants affected on those farms. The national prevalence was less than 0.00005%, well below the target of 5%.

Black Sigatoka Disease. No disease resistance to any of the fungicides was detected and there were acceptable levels of disease control when the crop was sprayed according to recommendations. This was resulting in relatively low numbers of fungicide applications ranging from 18 to 26 per year, compared to 55 applications in Costa Rica and other Central American (CA) countries. Similarly, the cost of control in Jamaica was 30% that of CA.

Panama Disease Tropical Race 4 (PDR4) had not yet been detected in Jamaica, and the quarantine strategy to achieve early detection with training, public awareness, surveys, improved testing capabilities and the availability the FHIA 25 variety (which is resistant to PDR4) was on target.

Exports

There had been remarkable increases in export production within the first years of the JBAMs programme; although the expected rate of increase was slowed in 2015 due to the drought. Nonetheless, export revenue in 2015 was J\$34M for 318 tonnes of banana exported. **For 2015, exports had exceeded that for 2014 by 51.4%.** Exports in 2013, 2014 and 2015 were 78 tonnes, 211 tonnes and 318 tonnes respectively. However, the Industry had not been able to take advantage of all opportunities to meet the demand from overseas markets for Jamaican bananas. There is a demand for at least 20 containers (325 metric tonnes) of export bananas weekly.

Banana Export Expansion Programme (BBEP):

In order to increase production, the then Ministry of Agriculture & Fisheries launched the Banana Export Expansion Programme (BEEP). The programme aims to stimulate banana production quantity and quality, to meet export demand. Several outreach sessions about the programme were held with farmers in different regions of the island. The programme conservatively projects that investors will earn 29% return on investment in the first year and 42% in the second year. Forty-nine (49) farmers had applied to participate (with 147 hectares) and 24 were qualified immediately, based on the criteria for selection that were detailed in the programme.

The 24 farmers will produce bananas from 90 hectares of the 115 hectares (which was the target to provide three containers for export on a weekly basis). Constraints were being experienced by 14 farmers with 25 hectares in St. James who were eligible but were impacted by delayed infrastructure support for the Seven Rivers/Hazelymph Agro Park. As result the programme duration was extend from 18 months to 24 months. Nonetheless, approximately 36 hectares were already producing premium fruits and preparations were being made to export to Trinidad in the near future.

In conclusion, the Banana Board is the premier organization to lead the Industry and *to facilitate the enabling policies of the Ministry of Agriculture; to coordinate and implement technical development programmes in the Banana Industry; to advise the Minister of Agriculture on the status, issues and solutions for the Industry; to provide of disaster risk management solutions, applied research, production standards regulation and certification audit services, marketing and organizational support for a vibrant industry of commercially viable, competitive, diversified and integrated (backward and forward) banana and plantain farmers, who are producing at international standards to adequately supply diversified markets; and ultimately to be effectively responsive to the needs of the farming and agri-business clientele.*

Principal Focus in 2016/17

New activities in the medium-term 2016 to 2019 are underlined and are aimed at achieving the GOJ's mandate for transformation, modernization and sustainability of the Banana Industry, as well as to increase the earning capacity of the Board.

In the medium term (2016 to 2019), the Banana Board will intensify strategies to reinforce sustainability of the current technical services by providing new, but needed products, (such as

tissue cultured seedlings) and technical services to the clientele of farmers and agri-businesses. The strategies will generate additional income to the Board.

The Banana Board / JBAMs Programme strategies in 2016/2017 include the following:

1. The production and distribution of the new disease resistant high yielding varieties to farmers as seed start from which they must increase their cultivations for fruit supply for cooking, chips and development of by-products markets. This also involves the operation of the tissue culture bio-factory to produce much more seedlings in the future as the Industry expands.
2. To provide technical support to increase production volumes and quality of the conventional varieties for the premium local and export ripe fruit trade for reinvigoration of the export trade to diversified markets in the Cayman Islands, Canada, Trinidad and the United Kingdom. This involves achieving international best practice and certification standards.
3. Regulatory technical standards of disease control, product quality and operational procedures with support to farmers and agro-business enterprises, including the transfer of technologies for drought and storm mitigation on farms and the administration of the Banana Industry Catastrophe Fund for weather risk management.

The Board's strategies are aligned with major medium term Strategies of the MOAF, which are:

- To strengthen the framework for greater competitiveness of diversified banana and plantain products and increase output of the crops and sector strategy.
- To implement the national development plans for the banana and plantain sub-sectors.
- To strengthen the banana and plantain research and development programmes.
- To promote national food and nutrition security and safety through best practice and Global GAP certification
- To increase access to resources and provide effective services to youth and women in agriculture
- To increase resilience of the agricultural sector to environmental and other natural hazards

COMMODITY BOARDS

COCOA INDUSTRY BOARD

The Cocoa Industry Board was established under the Cocoa Industry Board Act of 1957. Governance provided by seven (7) members appointed by the Ministry of Agriculture and Fisheries. Three (3) members are growers' representatives, chosen from five names submitted by the JAS Cocoa Growers Federation Limited.

Mission/Mandate

- To promote the interests and efficiency of the cocoa industry in Jamaica;
- To assist in its development and to promote the welfare of persons engaged in the industry;
- To secure the most favourable arrangements for the purchase, handling, marketing, sale, importation and exportation of cocoa;

- Upon being required to do so by the Minister, to make recommendations to the Minister as to any matter directly or indirectly affecting, relating to, or connected with, the cocoa industry or persons engaged in the industry;
- To perform such other duties in relation to or connected with the cocoa industry or persons engaged in that industry as the Minister may require to be performed by the Board.

Aim

To develop and maintain a sustainable cocoa sector which will eventually improve the lives of all industry stakeholders

Major Activities

- Production and Productivity Programme
- Rationalisation Programme

Principal Focus for 2016/17

- 500 tonnes of cocoa production for each reaping period
- 100% of Commercial assets divested

COFFEE INDUSTRY BOARD

Mission

The Coffee Industry Board is committed to encouraging the development of an environmentally-sustainable and globally-competitive Industry, promoting the welfare of persons engaged in the Industry and protecting the quality and integrity of Jamaican Coffee.

Aim

To ensure that at least 50% of the green bean produced is utilized in value-added products made in Jamaica, combining strategic marketing and the latest technology, to enable us to transfer the cache of JBM and JHMS coffee to products with greater shelf life, intense brand appeal and loyalty. The CIB must work with the Coffee Dealers to set up the enabling environment for this to happen.

Major Activities

- Sustainable Coffee Industry Programme

Principal Focus for 2016/17

- 160,000 boxes of JBM
- 38,000 boxes of JHMS with average of less than 10% defects

COCONUT INDUSTRY BOARD

The Coconut Industry Board was established under the Coconut Industry Control Act, Cap. 62, enacted in 1945. It is directed by a board of directors which consist of nine (9) members, four (4)

of whom, including the Chairman, are appointed by the Minister of Agriculture. The remaining five (5) are elected by registered coconut growers and must themselves be registered coconut growers or the attorneys for such registered coconut growers.

Aim and Objectives

To promote the interest of the Jamaican Coconut Industry and its stakeholders, by encouraging and facilitating the efficient production of coconuts, providing on-going research support, developing marketing opportunities, locally and globally and administering for the purchase, sale, exportation and importation of coconut products and substitutes in order to develop a profitable and sustainable industry.

Major Activities

- Production and Productivity Programme
- Planting Programme
- Marketing of Seed Nuts for farmers
- Regulatory Functions – issuing permits and releases
- Research and Development

Major Achievements

- 8,353 seedlings distributed
- 8000 seedlings with F.O.B value US\$18,525.00
- 523 import permits

JAMAICA 4-H CLUBS

Aims and objectives of the Jamaica 4-H Clubs

The Jamaica 4-H Clubs is mandated to provide training for youths between the ages of five (5) to twenty (25) years of age in areas of agriculture, home economics, leadership skills, social skills, environmental awareness, technology and healthy lifestyle. To stimulate young people in choosing careers in the Agriculture with the provision of Career Development Workshops. To reduce youth unemployment by providing training and venture inputs for the establishment of new Agriculture Enterprises.

The Jamaica 4-H Clubs was established (under statute)

The Jamaica 4-H Clubs was established in 1940 under the Jamaica Agriculture Society. The Jamaica 4-H Clubs became a Statutory Body under The Jamaica 4-H Clubs Act of 1966.

The Jamaica 4-H Clubs major activities during 2015/16

- Nutraceutical Farmers were trained and will be provided with venture inputs
- Livestock Revolving
- Youth Entrepreneurship Programme

- Training and Registration
- National School Garden Programme

The Jamaica 4-H Clubs main achievements during 2015/16

- 105,177 members registered and 336,046 training exposures in agriculture, technology and other related disciplines
- 31 youths trained in Tractor Operation at HEART level 2 standard
- 376 young farmers were trained in entrepreneurship and given venture inputs.
- 467 school gardens were established
- 304 livestock farmers were trained and given inputs under the Jamaica 4-H Clubs Livestock Revolving Programme
- 53 Nutraceutical Farmers were trained

Principal focus for 2016/17:

Nutraceutical Entrepreneurship and Training Programme

Under this programme 100 young agriculturalists will be trained and deployed in the nutraceutical Industry. Trainees will be equipped with 50 acres of land and other input to be cultivated for nutraceutical extractions.

Rural Youth Economic Empowerment Programme (RYEEP)

To facilitate the establishment of 1000 new youth operated enterprises in Rural Communities. Trainees will be provided with training in agriculture, technology and other related areas.

School Garden Programme

This programme will establish model gardens in public schools which will be used as training models for both youth and adult farmers. These training models will expose farmers to new and adaptable technologies in an effort to increase production and achieve agricultural practices. Also, the gardens will reduce the cost of school feeding programme through the encouraging schools to cultivate and use input from school gardens

Livestock Development Programme

Under this programme 100 livestock farmers will be established. They will be trained in the production of six categories of livestock enterprises. This will create 100 agri-enterprises which will reduce the importation of meat and meat products by providing inputs for the establishment of new livestock farmers.

Membership Improvement and Developmental Training

To mobilize, register and train members in order to encourage youth in choosing agricultural careers. Each member will be provided with at least 2 training opportunities in Agriculture.

JAMAICA DAIRY DEVELOPMENT BOARD

Legal status

The Jamaica Dairy Development Board (JDDB) was established as a statutory authority pursuant to an Act of Parliament (Act 4 of 2009) in March 2009. The overarching imperative of The JDDB is to promote and foster the development, and regulation of the dairy sub-sector, with particular emphasis on advancing local milk production, and the achievement of efficiency in the production, processing, marketing and trade in dairy products.

The JDDB as part of its corporate responsibility, and in keeping with the broader policy and developmental agenda of the Government of Jamaica e.g. Vision 2030, must provide the specific policy and legislative framework for the sub-sector, whilst facilitating relevant support services to stakeholders.

Aims and Objectives of the JDDB

The general objective of the JDDB is to ensure the creation of a policy environment which will promote the orderly development of Jamaica's dairy industry in a sustainable and globally competitive manner for the benefit of the producers and consumers of milk in Jamaica.

In pursuance of its objectives the Board effects the following:

- Formulate and monitor appropriate policies for, and monitor the growth of the dairy sector;
- Supervise, and where necessary, arbitrate milk contractual agreements between sector participants;
- Regulate the trade in dairy
- Disseminate information and reliable statistics on all aspects of the dairy sector;
- Advise the Minister on matters of general policy relating to the dairy sector;
- Mobilize resources for and on behalf of the dairy;
- Perform other functions as assigned by the Minister.

To realize the foregoing, the JDDB will undertake a range of technical and information gathering functions aimed at enhancing its effectiveness in planning and policy formulation; standard setting and enforcement; arbitration, as well as its critical role in business development and industry promotion.

Planned Targets

- Herd Expansion through heifer acquisition and redistribution;
- Employment of drought alleviation/climate change mitigation strategies;
- Enhanced technological adaptation through equipment lease programme;
- Provide access to concessionary loans for working capital support and development on-farm;
- Expand the delivery of potable water to animals;
- Increasing the capacity of farmers to have access to fodder of high nutritive value;

- Establishment of Agricultural Education Institutions as Centres of best practices for dairying;
- Data collection;
- Facilitate private/public partnership sectoral investments ;
- Technical Exchange with local, regional and international partners;
- Training/Capacity Building of Dairy Farmers' Organization;
- Revision to Policy, Institutional and Regulatory framework for the dairy (livestock) sector;
- Cattle Larceny reduction programme.

Achievements

- Acquisition and, on-loan redistribution of 300 dairy heifers to dairy farmers and Agricultural Education Institutions;
- Re-establish/resuscitate 90 ha. of fodder as a hedge against conditions of drought;
- Acquisition (\$14.2 million) and lease of equipment to facilitate greater efficiency of fodder utilization;
- 10, applications received for Concessionary Loans valued at \$65 million;
- Provision of water storage and distribution structures, and accessories, to farmers valued at \$5.5 million;
- Acquisition and redistribution to farmers, on a grant basis, seeds of highly productive grass cultivars with high nutritional value, an overall expenditure of \$4.0 million;
- \$20.5 million expended on efforts to transform Agricultural Educational Institutions into Centres of best practices for dairying;
- Report on cattle census received;
- Ongoing cooperation with IICA in the development of Silvo-pastoral systems as a climate change mitigation strategy;
- Cooperation with IICA to improve the governance structure of the Rhymesfield and St. Elizabeth Dairy Cooperatives and, the St. Thomas Small Farmers' Scheme;
- Consultant's final report on Revision to Policy, Institutional and Regulatory framework submitted;

Principal Focus for 2016/2017

- Continued revitalization of the dairy sub-sector through:
- Policy interventions to ensure a 'level playing field' for all players in the sector;
- Enhancement to production, productivity, marketing and enabling environment

RURAL AGRICULTURAL DEVELOPMENT AUTHORITY (RADA)

The Rural Agricultural Development Authority (RADA) is a statutory body under the Ministry of Agriculture & Fisheries. RADA was established under the Rural Agricultural Development Authority Act of 1990, replacing the Land Authorities Act and began its operation on August 1, 1990. It is Jamaica's chief agricultural extension and rural development agency.

The mission of RADA is to promote agricultural production as the main engine of growth in rural communities; provide or ensure the provision of technical, marketing, financial and infrastructure facilities and provide the social services required for the improvement of the quality of life of farm families.

Mandate

- To enhance the development of farming through an effective, efficient and sustainable Extension Service.
- To supplement information to rural development agencies, thereby assisting to advance improvements in rural infrastructure.
- To provide the supplemental social services required for the improvement of the quality of life of farm families.
- To provide technical advice to farmers of any size. To provide a reliable agricultural marketing information service.
- To assist in the implementation of specified rural development projects.

Aim

- Improvement in production and productivity of crops and live stocks
- Encouragement of new entrants to the sector with greater focus on Women and Youth
- Organization Re-Alignment:
 - Greater focus on the technical nature of the Authority
 - Capacity building for staff
 - Develop alternative sources

Major Activities

- Farm Mechanization
- Farmer Training/ Extension Delivery
- Drought Mitigation Project
- Farm road rehabilitation project
- Rehabilitation and Replanting of Coffee in Blue Mountain Ridge Affected by Fire
- Agricultural Business Information System (ABIS)/Tracker System
- Fruit Tree Crop Production
- Area Development Programme
 - Irish Potato Programme
 - Backyard Chicken Project
 - Honey and Beekeeping Project
- Home Economics and Social Service
- Marketing Extension
- Plant Health Crop Care – Food Safety Modernization
- Soil Conservation and Land Management

Achievements

Major achievements in select activities under RADA:

Rehabilitation and Replanting of Coffee in Blue Mountain Ridge Affected by Fire

The Blue Mountain Ridge stretching across the parishes of St. Thomas, Portland and St. Andrew is the principal growing area for Jamaica's premium coffee; "Blue Mountain coffee". This area is mainly cultivated by small farmers on less than five (5) acre holdings. In the communities along the Blue Mountain Ridge, coffee is the major crop of socio-economic significance.

In May 2015 and July 2015, bush fire in the Blue Mountain Ridge area destroyed and caused extensive fire damage to seventy (70) acres coffee and two hundred and thirty (361) acres respectively, in St. Andrew and St. Thomas; 124 acres destroyed and 103 acres damaged by fire; in Portland, three (3) acres were destroyed.

This loss (**an estimated \$103,600,000**) to predominantly small holders in rural areas threatened the rural economies of these areas affected by the fire and destabilized the livelihoods of rural folks. This happened at a critical time when the farms are in harvest.

Aim

The programme seeks to prevent rural poverty; maintain the sustainable rural economy of these areas and prevent loss of international market share for coffee

Planned Targets

The programme was to provide support to farmers of the Blue Mountain Ridge who cultivate coffee and have been completely burnt out as follows:

- Thirty Thousand Dollars (\$30,000) per acre for land rehabilitation;
- Four (4) bags of 50kg of appropriately formulated fertilizer to aid replanting and resuscitation
- Seedling at 900 seedlings per acre

This will enable farmers to resuscitate summer/fall; replant fall 2015 and Spring 2016.

Farmers whose holding have partial damage to receive two (2) bags of 50kg of appropriately formulated fertilizer to aid resuscitation. These beneficiaries shall be registered farmers meeting the cost selection criteria.

Farm Road Rehabilitation Programme

The Ministry recognized that access to good farm roads play an important role in agricultural development in Jamaica. It is crucial for sustainable agricultural production to ensure that farmers are able to move produce in a more efficient manner from farm to market.

Aim

- To sustain good agricultural roads so that farmers will be able to transport farm produce in a more comfortable manner

- Reducing or eliminating elderly farmers from transporting farm produce on their heads for prolong distance and up treacherous terrain
- To increase production and productivity with access to good farm roads

Major Activities

- Rehabilitate Farm Roads across ALL 13 parishes

Major Achievements

- 38 farm roads rehabilitated at a cost of \$374,300,204.64

Principal Focus for 2016/17

- Rehabilitate six (6) farm roads at a cost of \$45,000,000.00

SUGAR INDUSTRY AUTHORITY (INCLUDING SUGAR INDUSTRY RESEARCH INSTITUTE)

BACKGROUND

The Jamaican Sugar Cane Industry – The local sugar industry is a vertically integrated manufacturing business, which contributes one (1) percent to our country's Gross Domestic Product (GDP) and earned/saved US\$85.0M in Financial Year 2014/15, of which some 80 percent was retained in the country. The sugar cane industry employs an estimated 165,000 persons directly and indirectly in over 28 political constituencies across rural Jamaica.

The GOJ's Sugar Adaptation Strategy, being implemented since 2007 aims to increase total output from 1.5 million tonnes cane to 3.5 million tonnes by 2020. The successful divestment of all GOJ-owned sugar estates to private investors has spurred massive investment in new plant and systems including the co-generation of electricity.

The Structure of the Sugar Cane Industry - Currently, there are:

- 6 large estates with a factory: **60% of cane (1.1 M tonnes)** ;
- 6,900 independent cane farmers: 40% of cane (0.7 M tonnes) ;
- 5 distilleries making rum.

The Key Sugar Stakeholders are:

- Sugar Industry Authority (SIA): **Regulatory body**;
- Jamaica Cane Products Sales Ltd & Pan-Caribbean Sugar Company; Golden Grove Sugar Company Limited: **Sales & marketing**;
- Sugar Industry Research Institute (SIRI): **Research & Development**.
- National Workers Union (NWU); Bustamante Industrial Trade Union (BITU); University and Allied Workers Union : **Trades Unions**

- Sugar Producers Federation (SPF) : **Representative of employers within the sugar cane industry;**
- All-Island Jamaica Cane Farmers Association – **Representative of all registered cane farmers;**
- Sugar Manufacturing Corporation of Jamaica Limited – **Representative of all sugar estates with a factory.**

SITUATION

The critical challenges and issues facing the industry include the following:

- Falling prices in Jamaica’s key export markets – Convergence of EU sugar prices with world market prices driven by EU market liberalization;
- Thirty (30) percent fall in prices paid to local producers in 2015/16 compared to 2014/15;
- Negative impact of three (3) years of drought conditions on cane production and inability of the National Irrigation Commission to supply adequate irrigation water in Clarendon and St. Catherine;
- Low productivity and efficiency resulting in high unit cost of production;
- Poor condition of cane roads and inadequate funding for repairs;
- Inadequate credit arrangements to fund timely acquisition of fertilizer, herbicides, irrigation water and other inputs, and replanting especially by independent cane farmers;
- Pricing policy adjustments needed to incentivize sustainable production of sugar cane.
- Inability of Appleton Estate which produces 20% of overall sugar output to commence operations due to a court injunction;
- Closure of Long Pond sugar factory in 2015/16 crop, necessitating transfer of large quantities (117,000 tonnes) of cane from Trelawny to Worthy Park and Appleton Estates;

THE WAY FORWARD - A PROPOSED RESPONSE PLAN

The overarching response strategy should be to migrate all sales of locally produced sugar from bulk for export, to branded packaged sugar for local and export sales as quickly as possible. Since JCPS, in its role as chief marketer of domestic sugar, has failed to implement this strategy over the years it may be more effective if each sugar factory is allowed to market their products directly as marketing agents of the SIA. Some specific response actions could include the following:

- i) Transfer marketing arrangements for sugar and molasses to factories wishing to take up the responsibility, with adequate safeguards for cane farmers. JCPS will then become sole importer of sugar on behalf of the SIA;
- ii) Provide for the recentralization all sugar (raw and refined) imports by the SIA or its agents;
- iii) Provide for all sugar (raw and refined) retailed in Jamaica to be packaged and branded (traceable);
- iv) Establish a Sugar Cane Industry Capital Development Fund to finance capital investments by sugar factories and growers in development of food-grade plants, co-generation, cane roads, research capacity and efficient cane production technologies and techniques;

- v) Impose a Cess on molasses sold to distillers (both local production and imports) for three (3) years with all revenues going into a Sugar Cane Industry Capital Development Fund;
- vi) Impose a Cess and strict controls on the importation of refined sugar for all end-uses for at least three (3) years with all revenues flowing into the Sugar Industry Capital Development Fund;
- vii) Implement the Cabinet-approved restructuring arrangements for SIA/SIRI without delay. This action will deliver more effective industry regulation and research and development at a lower cost to the industry;
- viii) The expenses to operate the core sampling process should be absorbed by each factory directly, thus removing same from the SIA budget;
- ix) Increase the capacity for bagasse cogeneration of electricity for sale to the grid from an estimated 10 Megawatts;
- x) Pricing policy: Convene a Judicial Commission to establish growers share in sugar, molasses, and commercial bagasse revenues.
- xi) Other necessary actions.

APPENDIX

Industry and Commerce Portfolio

DEPARTMENTS

- Commerce
- Industry
- Legal
- MSME
- Trade

AGENCIES

- Anti-Dumping & Subsidies Commission (ADSC)
- Bureau of Standards Jamaica (BSJ)
- Cannabis Licensing Authority (CLA)
- Companies Office of Jamaica (COJ)
- Consumer Affairs Commission (CAC)
- Dept. of Cooperatives and Friendly Societies (DCFS)
- Fair Trading Commission (FTC)
- Food Storage and Prevention of Infestation Division (FSPID)
- Hazardous Substances Regulatory Authority (HSRA)
- Jamaica Business Development Corporation (JBDC)
- Jamaica Intellectual Property Office (JIPO)
- Jamaica National Agency for Accreditation (JANAAC)
- Micro Investment Development Agency (MIDA)
- National Compliance Regulatory Authority (NCRA)
- Office of the Government Trustee (OGT)
- Office Supervisor of Insolvency (OSI)
- Self Start Fund (SSF)
- Trade Board Limited (TBL)
- The Hazardous Substances Regulatory Authority (HSRA)

Agriculture and Fisheries Portfolio

COMMODITY BOARDS

- Agricultural Credit Board
- Banana Board
- Coffee Industry Board
- Cocoa Industry Board
- Coconut Industry Board
- Jamaica Dairy Development Board

AGENCIES/DEPARTMENTS

- Agro-Investment Corporation (Agro Parks)
- Banana Insurance Fund
- Fisheries Management & Development Fund
- Jamaica Agricultural Society
- Jamaica 4-H Clubs
- Jamaica Exotic Flavours & Essences Company Limited
- Jamaica Veterinary Board
- Protection of Plant Genetic Resources for Food and Agriculture Management Authority
- Rural Agricultural Development Authority (RADA)
- Sugar Industry Authority
- Sugar Company of Jamaica Holding Ltd.
- Sugar Company of Jamaica (SCJ) Legacy
- Sugar Transformation Unit (STU)
- Tobacco Industry Control Authority

PROJECTS

- Agricultural Competitiveness Programme (ACP)
- Diversification of the Caribbean Livestock through the Production of Small Ruminants
- Enhancing Resilience of the Agricultural Sector and Coastal Areas to Protect Livelihood and Improve Food Security
- Jamaica Banana Accompany Measure (JBAM)

Ministry Paper /2016

**Ministry of Industry, Commerce, Agriculture & Fisheries
Performance Report 2015 - 2016**

1.0 Purpose

The matter for tabling is the Performance report for the period April 2015 to March 2016 on the major programmes, initiatives, and project undertaken by the Ministry of Industry, Commerce, Agriculture and Fisheries for the development of the Agriculture, Manufacture, and Service Sectors in Jamaica. The complete report is attached to this Ministry Paper.

2.0 Background

MICAF is a new Ministry, representing a merger of the Industry and Commerce components of the old Ministry of Industry, Investment and Commerce (MIIC) and the previous Ministry of Agriculture and Fisheries (MOAF). For the reporting period, MIIC and MOAF operated as separate entities; hence despite the merger, the report will largely reflect this.

In going forward, the aim is to fully integrate the different components to a single, functional ministry. The synergies between industry and agriculture are obvious and the Ministry intends to leverage these as the government intensifies its thrust for economic growth and job creation. Agro-industry is vital in realizing this objective; and the Ministry intends to promote and facilitate increased integration into supply and value chains. These will be reflected in the 2016-2017 Performance Report.

The 2015-2016 Performance Report will present the Ministries' planned deliverables as reflected in the Ministers' Budget Speeches, 2015/2016 Operational Plans and Strategic Business Plans 2015 – 2017 for the Agriculture & Fisheries and Industry & Commerce Portfolios. It should be noted that planned deliverables were aligned with the goals established in the Vision 2030 Jamaica-National Development Plan. This plan provides both the policy framework, priority setting and implementation guide which drives the programmes and projects in the Ministry as it carries out its mandate.



Karl Samuda, MP
Minister of Industry, Commerce, Agriculture & Fisheries
June 6, 2016