

GREEN OPPORTUNITIES WITH AN ORANGE TOUCH

Opportunities for Dutch investors, importers and exporters
in fruits, vegetables and ornamentals
in Central America


Arno van der Maden

Edwin Smit


The logo for 'idea elop' features the word 'idea' in orange and 'elop' in green. A stylized green plant with two leaves and a yellow sun-like circle is positioned between the two words. Below the text is a green brushstroke.

idea elop



A wooden signpost stands in a forest. The sign is rectangular with a white background and a dark border. It is mounted on a wooden post. The text on the sign reads: "The world's biggest auction is building new facilities on this location". The background shows trees and foliage.

The world's
biggest auction
is building new
facilities on this
location

A wooden signpost stands in a forest. The sign is white with black text. The text reads: "Please keep this sign", "We might need it soon", and "CCWS". The sign is mounted on a wooden post. The background shows trees and foliage.

Please keep
this sign

We might need
it soon

CCWS

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Program

1. Central America – facts figures
2. Central America – trade
3. Country competitiveness
4. Business Ideavelopment Chart
5. Country – product BIC
6. Scenarios

The logo for 'idea velop' features the word 'idea' in orange and 'velop' in green. A stylized green figure with a yellow circle for a head is positioned between the two words. Below the text is a green brushstroke. The background of the slide features a green landscape with rolling hills and a sun on the left.

idea velop

Central America – facts figures



Central America – facts figures

- What do you know about Central America?
- 521,500 square km
- Population of 40 million people
- GDP in agriculture from 7% (PN) to 22% (GT)
- Central American Free Trade Agreement with USA
- Free Trade Agreement with Europe

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Agricultural exports

	Export (x 1000 US\$)				
	2002	2003	2004	2005	2006
Total Central Am.	1835512	1995097	2224894	2374303	2769174
Total Costa Rica	1045787	1180828	1287680	1336499	1650496
Total Guatemala	349860	350944	378572	413176	395264
Total Panama	168186	172822	205350	267835	343903
Total Honduras	203064	220165	261708	261492	261163
Total Nicaragua	39326	44493	44677	56404	70370
Total El Salvador	29289	25845	46907	38897	47978
Crop	2002	2003	2004	2005	2006
Fruits	1292023	1449092	1598901	1662601	1988774
Costa Rica	716023	852450	910566	922466	1197479
Panama	151538	157642	191416	236197	313761
Guatemala	253741	250915	269665	286965	263556
Honduras	150201	167616	201994	194247	190434
Nicaragua	16242	18816	18497	20313	20871
El Salvador	4278	1653	6763	2413	2673
Proc. fruits and vegetables	179082	176514	207303	237158	282147

Agricultural export

	Export (x 1000 US\$)				
Crop	2002	2003	2004	2005	2006
Vegetables	178919	172218	211149	259429	264634
Costa Rica	62237	60313	77423	90513	85328
Guatemala	43127	42264	52869	61998	57659
Nicaragua	21555	23914	24811	34913	48044
Honduras	30924	26408	32957	36443	40279
Panama	13877	12166	9936	26401	22871
El Salvador	7199	7153	13153	9161	10453
Crop	2002	2003	2004	2005	2006
Ornamentals	185488	197273	207541	215115	233619
Costa Rica	146356	150580	162767	171571	184591
Guatemala	31270	33537	29016	31264	37162
Honduras	1980	6481	8430	5983	5945
El Salvador	2577	3825	4395	3675	3189
Panama	1943	1768	1735	1642	1642
Nicaragua	1362	1082	1198	980	1090

Agricultural exports

Export to the world:

- Total agricultural exports to the world: US\$ 2,8 billion
- Exports of fruits is 72% of total export value
- Exports of ornamentals is only 8,5% of total export

Export to the Netherlands:

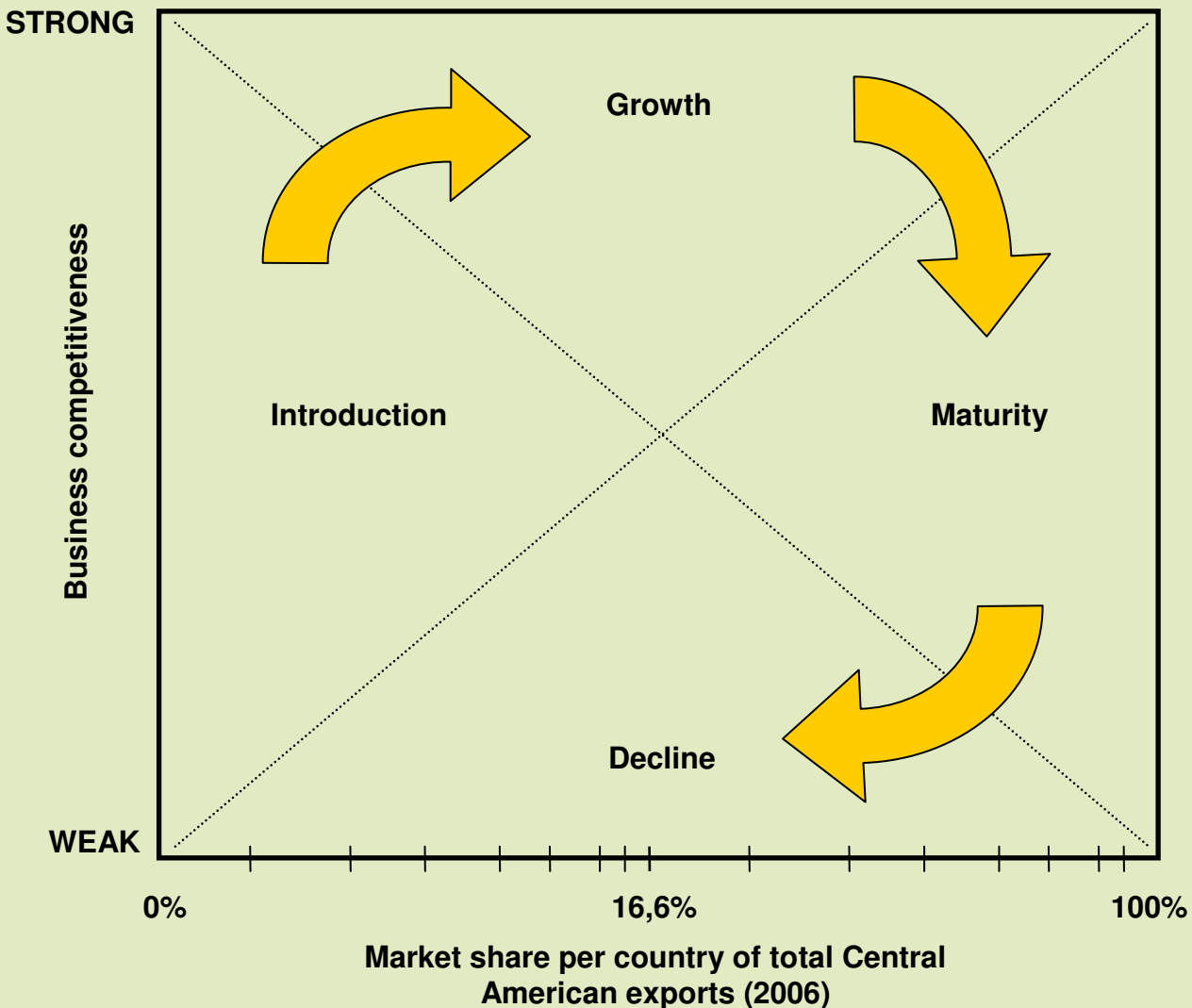
- Total agricultural exports to the Netherlands: US\$ 323 million (of which Costa Rica represents US\$ 227)
- Export of fruits represents 50% of total export value
- Export of ornamentals represents 24% of total export

Country competitiveness: 17 key aspects

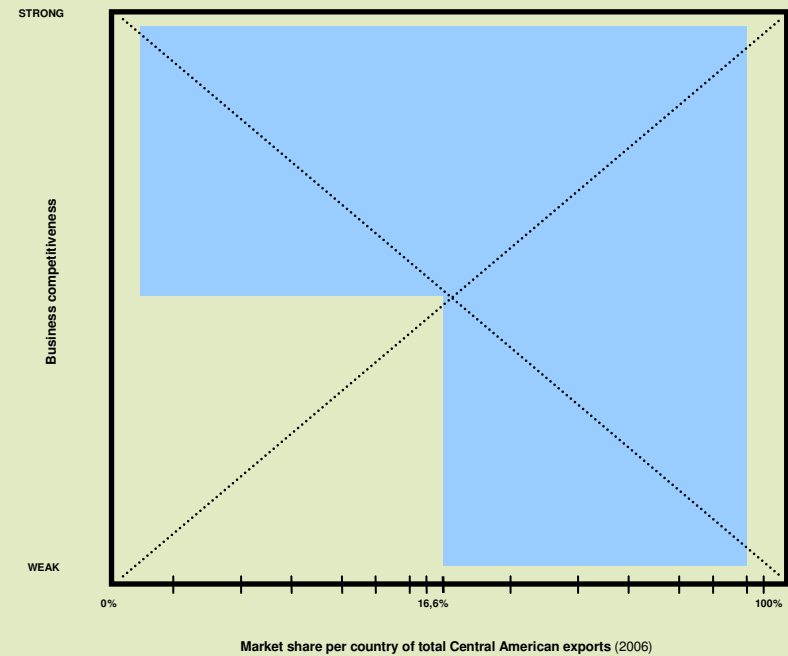
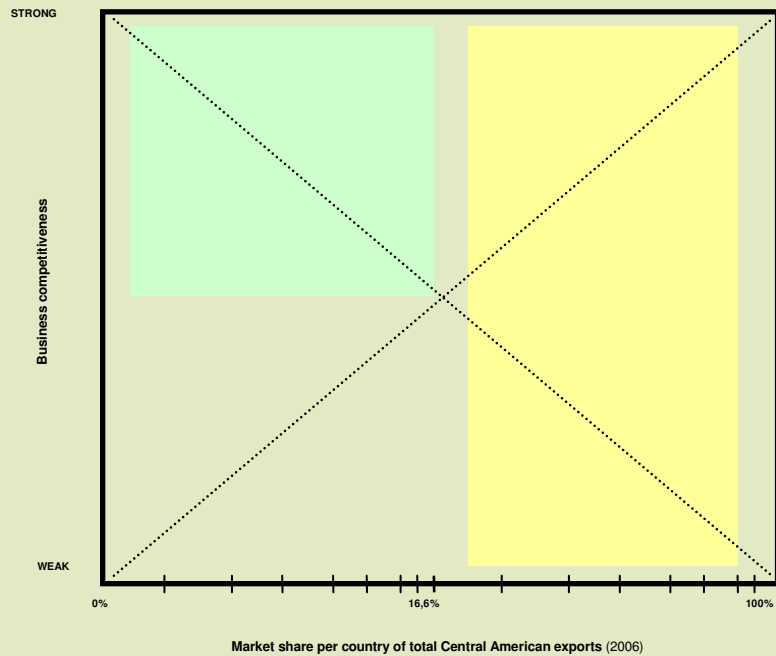
	CR	ES	GT	HN	NI	PN
1. Political aspects	3	3	2	3	1	3
2. Social aspects	3	2	2	2	2	3
3. Safety	2	1	1	1	3	3
4. Economic aspects	3	3	3	3	2	3
5. Fiscal aspects	3	2	3	3	3	3
6. Investment capital	2	3	2	2	2	3
7. Infrastructure (local)	2	3	3	2	2	3
8. Infrastructure (export)	3	2	3	3	1	2
9. Communication	2	4	3	2	3	3
10. Trade agreements	2	3	3	3	3	3
11. Climate and natural resources	3	3	4	3	3	3
12. Agricultural sector organization	3	3	3	2	3	2
13. Phytosanitary Service	2	3	3	3	3	2
14. Agricultural supplies	3	2	3	3	2	2
15. Labour (unskilled)	1	3	3	3	4	2
16. Labour (management)	4	2	3	3	2	2
17. Subsidies	1	3	2	2	3	2

Score: (1) bad, (2) regular, (3) good and (4) excellent

Business Ideavelopment Chart

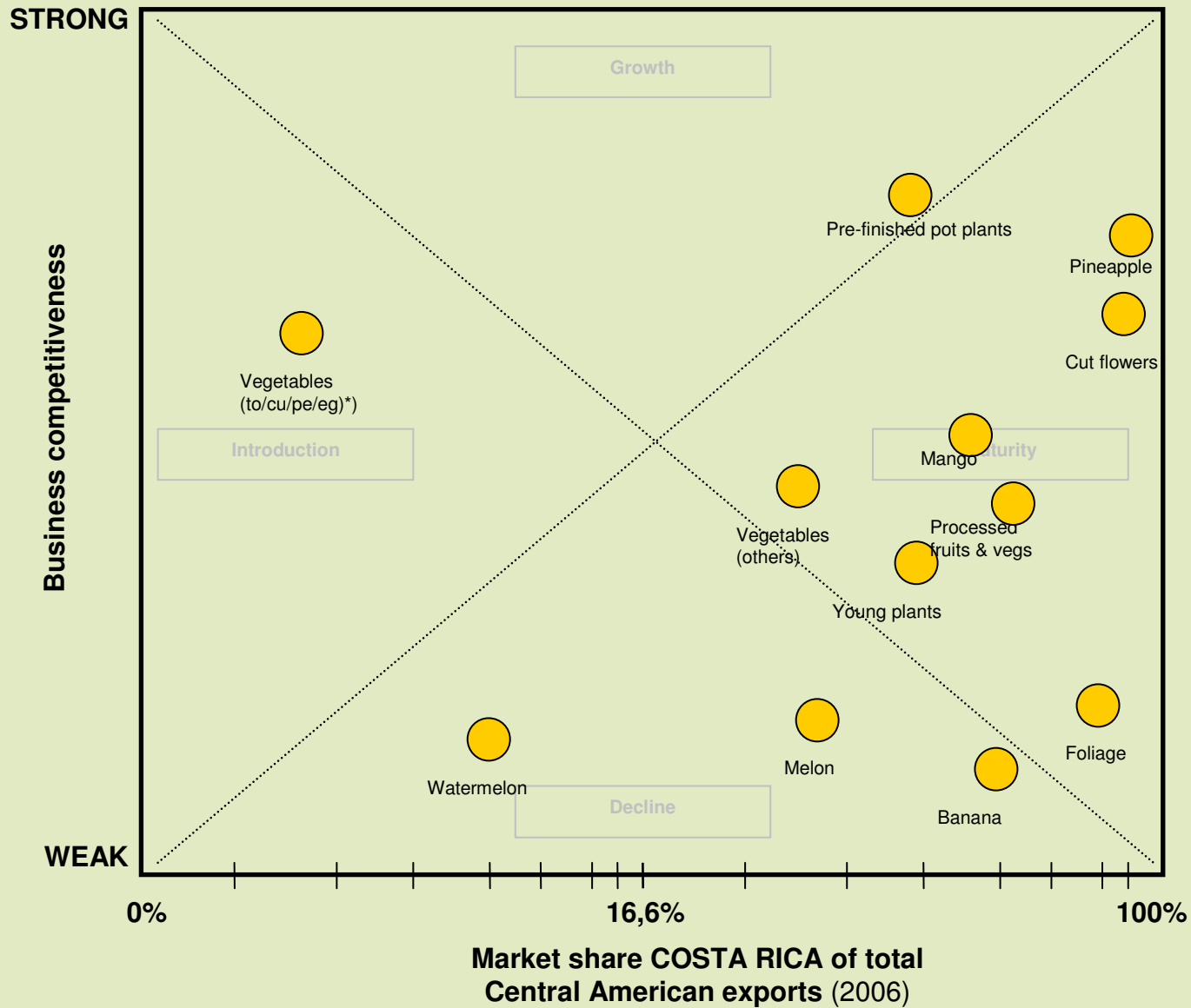


Business opportunities – target groups



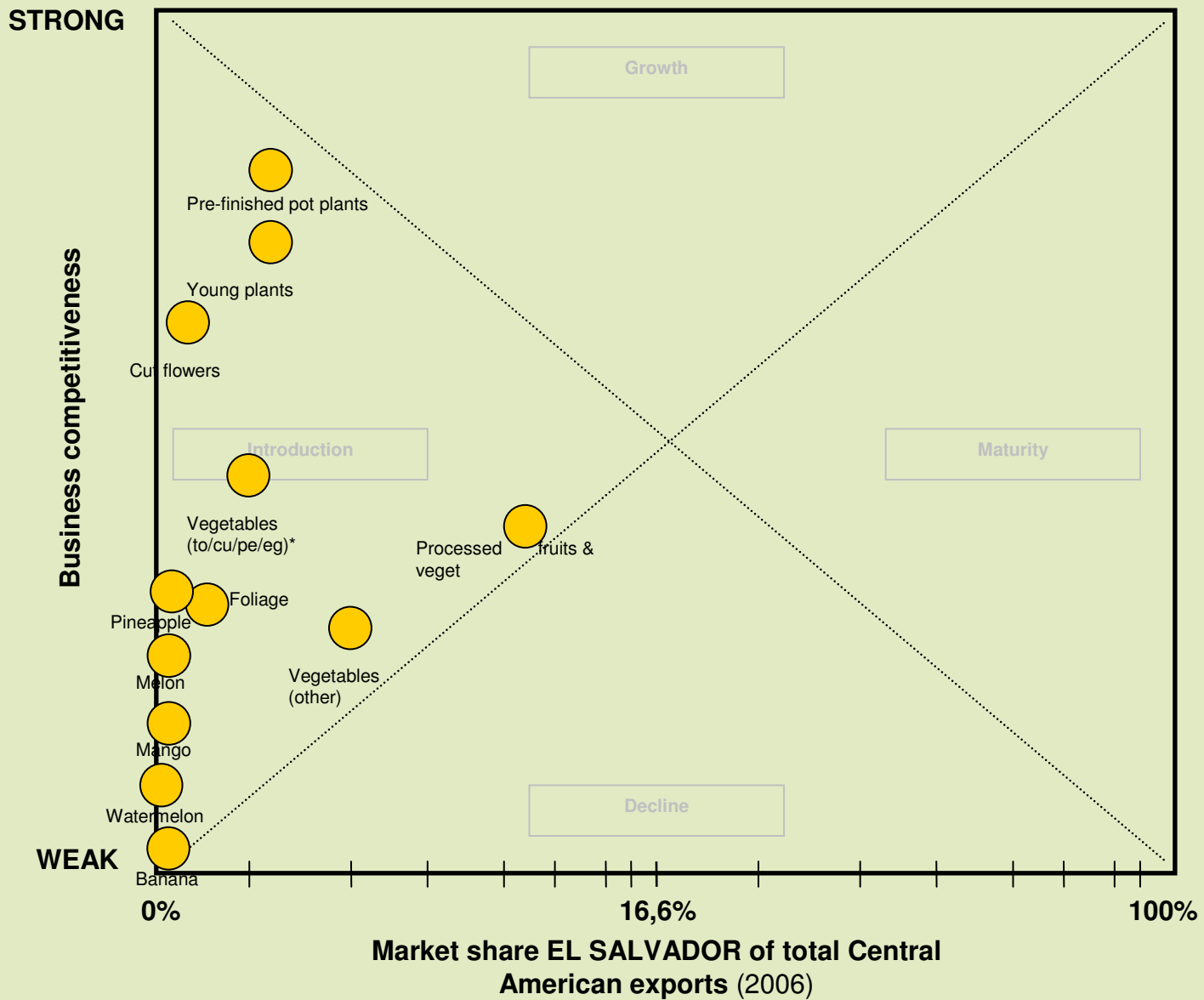
Investors: green
Importers: yellow
Exporters: blue

BIC – Costa Rica



Sector	YPL	PFP	CFL	FOL	VEG	BAN	PIN	MNG	WM	MEL	PRO
Opportunity											
Exporters of services											
1. Certification		X		X		X	X	X		X	
2. Residue labs						X	X	X		X	
3. Crop laboratories											
4. Crop consultancy	X	X	X	X	X						
5. Capacity building											
6. Market information		X	X			X	X				
Exporters of products											
7. Cultivation equipment	X	X	X		X						
8. Post harvest equipment		X	X	X	X		X	X	X	X	X
9. Greenhouses		X	X		X						
10. Crop protection		X	X	X	X	X	X	X	X	X	
11. Propagation material			X		X			X	X	X	
12. Peat moss / substrates	X	X	X								
13. Trays / pots	X	X									
14. Packing materials			X	X	X		X			X	X
15. Crop management software	X	X	X			X	X		X	X	
Importers & Investors											
16. Importers	X	X	X			X	X	X	X	X	X
17. Investors	X	X	X				X				X

BIC – El Salvador

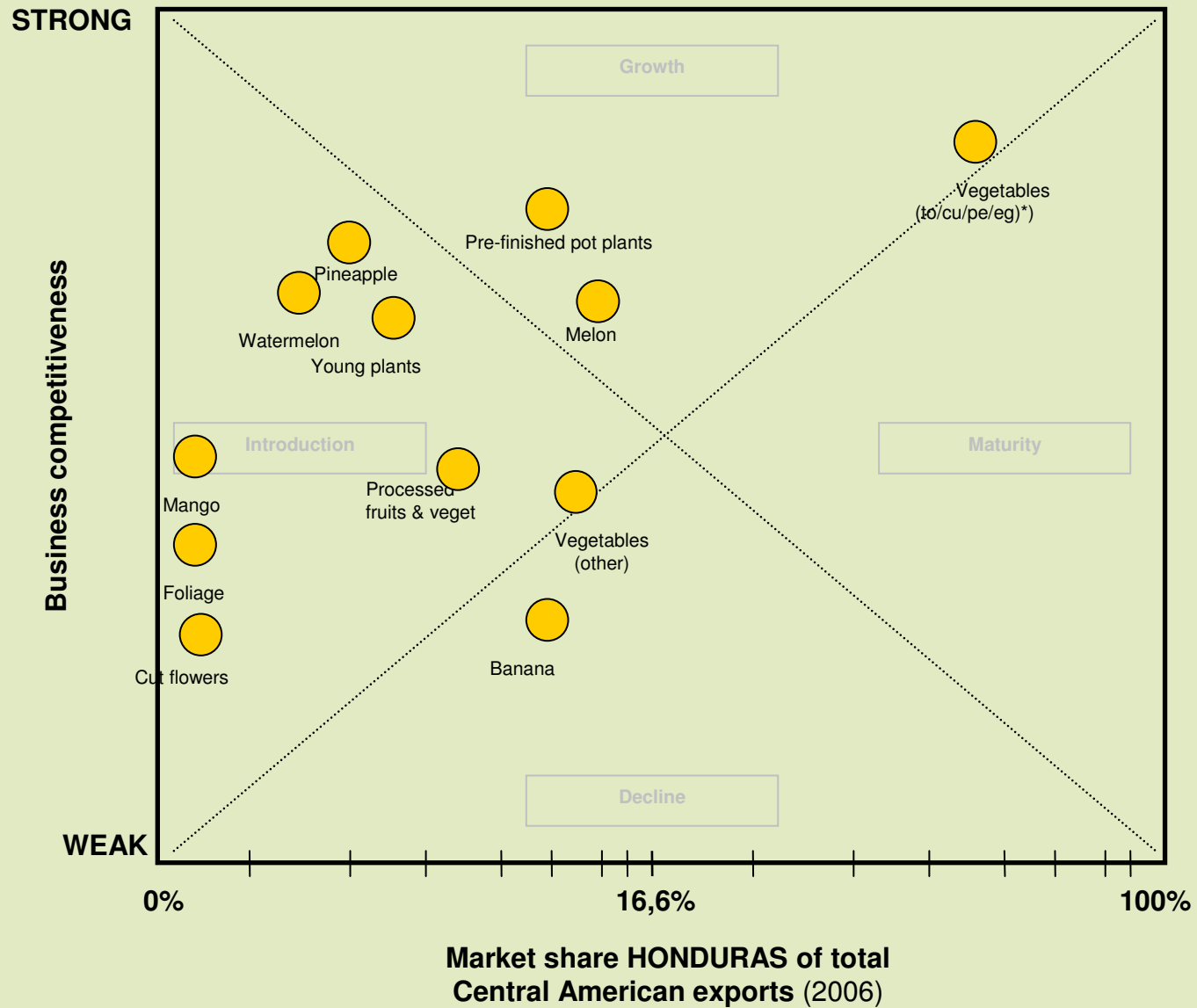


BIC - Guatemala

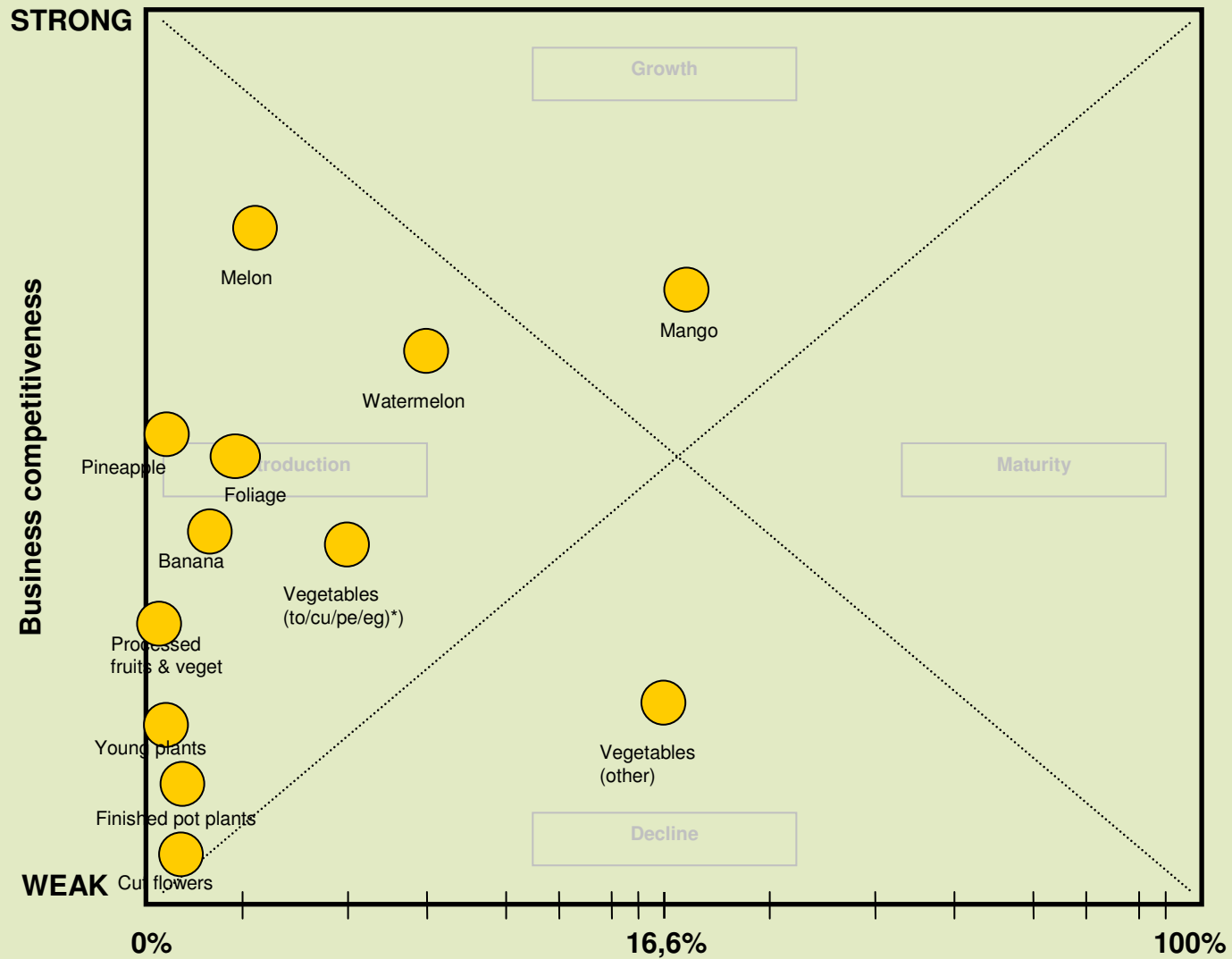


Market share GUATEMALA of total Central American exports (2006)

BIC - Honduras

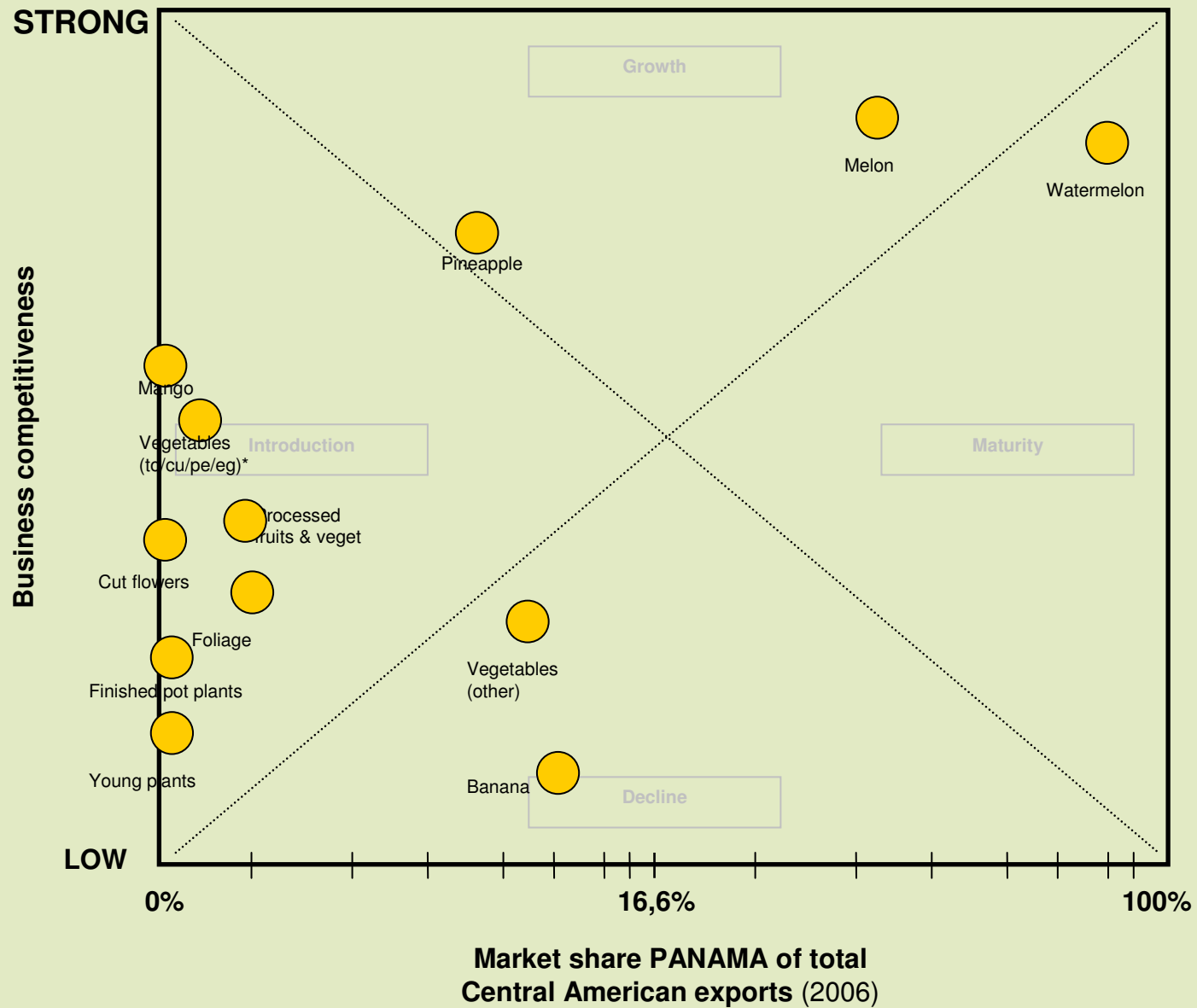


BIC - Nicaragua

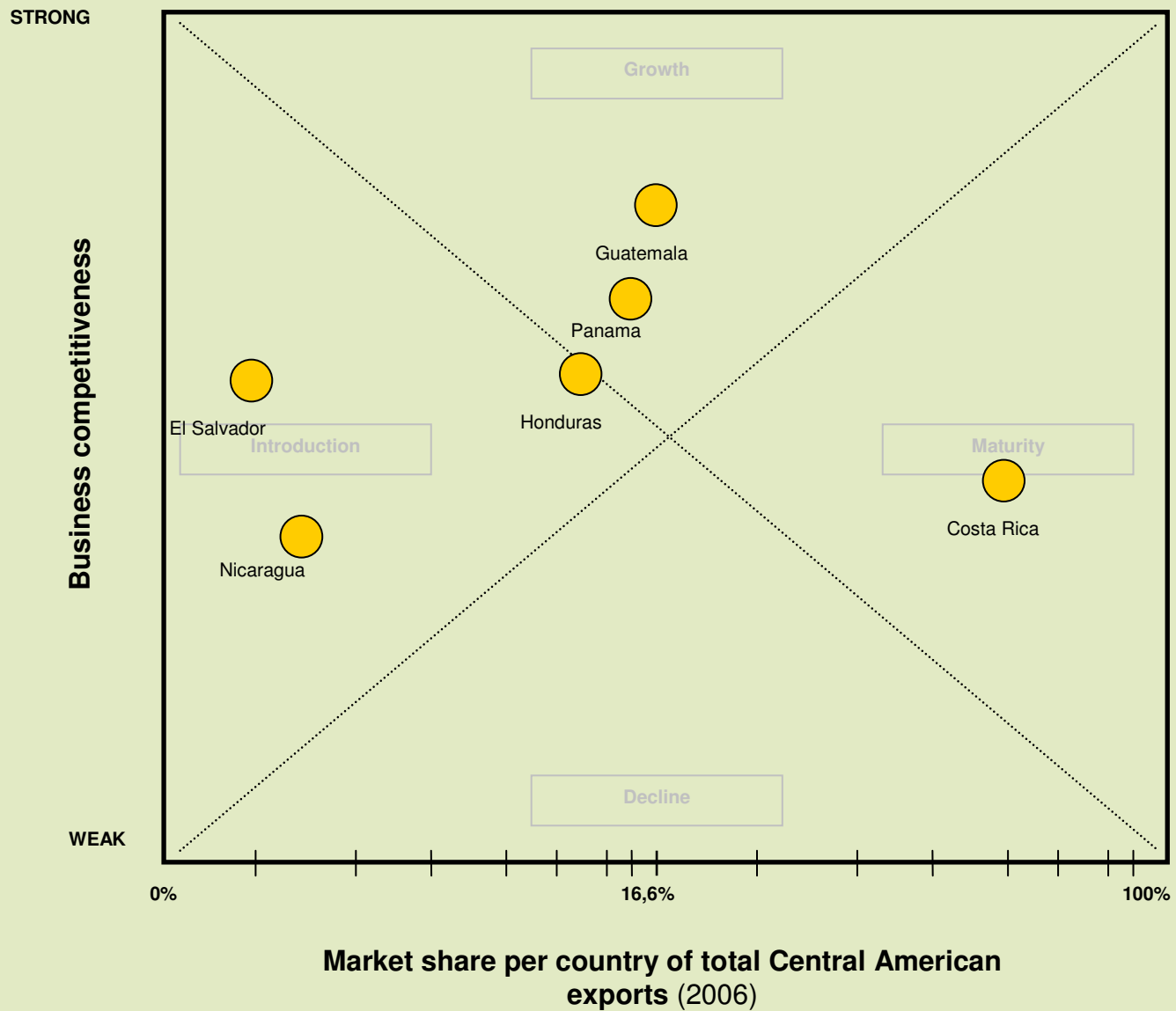


Market share NICARAGUA of total Central American exports (2006)

BIC - Panama



BIC – Central America



Scenario - vegetables

Seed production in Nicaragua:

- Logistics by air freight in small quantities
- Non-perishable
- Labour intensive
- High value product

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Scenario - ornamentals

Production of Phalaenopsis in Honduras:

- Increasing production in Europe and USA
- Good logistic facilities (harbour)
- Experienced growers
- Working together with Dutch partner to set up production

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Scenario - fruits

Production of Fair Trade melon in Costa Rica:

- Consumer trends – social aspects
- Pineapples, bananas, mangoes
- Conventional production less competitive
- Niche market looking at strengths
- Fits with the Costa Rican image

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Scenario – Central America

Joint Central American efforts:

- Business meetings in April 2008 GT and CR
- Joint participation Hortifair 2008
- Central American Agricultural Fair March 2009

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Strategic partners

- Knowledge on production and marketing
- Finance
- Access to high tech supplies
- Strategic partner ('omnipotent')

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Muchas gracias / Dank u wel !