

II STUDY OBJECTIVES AND SCOPE

The purpose of this study is to evaluate the ability of existing Canada-Caribbean air cargo services to promote mutual trade and economic development. The major component issues to be addressed include:

- . To what extent are existing Canada-Caribbean air services able to carry additional northbound and southbound volumes?
- . How do the existing air cargo links between the Caribbean and Canada compare to air services linking the south with the United States and Western Europe?
- . What products are currently being traded between the nations of the Caribbean and Canada, the United States and Western Europe.
- . What products and nations offer the best potential for developing northbound and southbound Canada-Caribbean trade?
- . How do freight rates between Canada, the United States and Western Europe on one hand and the Caribbean on the other compare? Do they place prospective Canada-Caribbean traders at a competitive disadvantage?
- . Is the infrastructure at Caribbean airports able to accommodate additional airborne trade with Canada?
- . How do airlines and prospective importers / exporters perceive existing Canada-Caribbean airborne trade and what do they believe are the major requirements for air freight service improvements? What do they view as the major opportunities for additional airborne trade?

The scope of the study is restricted to the air mode. Air linkages from the Caribbean to Canada, the United States, Western Europe and Eastern Europe are explored in depth. Intra-Caribbean air links and services from the Caribbean to Central and South America have not been considered. Import/export data bases assembled include products moving both by air and by surface, although the assessment of market opportunities addresses airborne trade exclusively. Trade from all regions of Canada is considered, although a special analysis of prospects from the Atlantic region has been performed.

Caribbean nations assessed in this study are Cuba, the Dominican Republic, the Bahamas, Barbados, the Leeward and Windward Islands, Jamaica and Trinidad-Tobago. Bermuda, Belize, Central America, Haiti and the French and Dutch Antilles are beyond the scope of the terms of reference.