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Jamaica & Dep

HRI Food Service Sector

Annual

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Report Highlights:

Despite declines in real per capita consumption, the non-tourism segment of the Jamaican market continues to present opportunities for the consumption of high-value U.S. agricultural products. The strong recovery of Jamaica's tourism industry during 2003 and the positive outlook for 2004 and 2005 will present increased opportunity for U.S. food and beverages.

Includes PSD Changes: No
Includes Trade Matrix: No
Annual Report
Kingston [JM1]
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I. Market Summary

A. Non-Tourism Market

Following four consecutive years of contraction (1996-1999), the Jamaican economy grew marginally by 0.7 percent during 2000, and by a further 1.7 and 1.0 percent in 2001 and 2002. The economic performance during 2001 and 2002 were particularly restricted by the plummet in the tourism sector, which resulted from the terrorist attacks in the United States and the resultant declines in global travel. The Central Bank has projected continued modest economic growth between 2.0 to 4.0 percent per year over the next three years. For the first two quarters of 2003, the economy expanded by 3.4 and 3.1 percent, respectively. With record performance in the tourism industry and increased agricultural output, the annual growth in the economy during 2003 is expected to be within the proximity of 2.5 percent.

The structural shift in the Jamaican economy from the productive to the services sector which began in response to trade liberalization and structural adjustment during the 1980's have intensified through the ensuing decades and has pushed services, particularly tourism, telecommunication, and transportation and storage to the helm of Jamaica's economic activities. Over the past decade, the services sector has expanded by an average 3.5 percent per year and its contribution to GDP increased from 62 to 85 percent. Conversely, output from the goods-producing sector has, in general, declined over the period.

The magnitude and horizon of Jamaica's economic growth is not sufficient to generate any meaningful change in the general pattern of household consumption. Over the four-year period between 1999 and 2002, Jamaica's real mean per capita annual household consumption expenditure has declined at an average annual rate of 3.5 percent. With the exception of 2001, where household consumption expanded by 8.5 percent, all other years over the period (1999 to 2002) recorded declines in consumption expenditures of significant magnitudes. This pattern was observed across all five socio-economic groups (quintiles) of the population and in the two major geographic segments of the market – Kingston metropolitan area (KMA) and other towns. As was expected, however, the declines were not evenly distributed, showing relatively less severity in the KMA and in the upper socio-economic segment. Noticeably, during 2002, real mean per capita consumption expenditure declined by 6.2 percent, almost entirely eroding the 8.5 percent increase during the previous year. Jamaica's per capita consumption expenditure, at current prices, stood at US\$1,737 during 2002. With an estimated population of 2.6 million people, total consumption expenditure in Jamaica's non-tourism market is estimated at US\$4.5 billion.

While food and beverage accounts for the largest proportion of Jamaica's mean per capita consumption expenditure, its relative contribution has trended downward over the last five years, declining from a high of 54.7 percent during 1995 to 43.5 percent during 2001, and by a further 3.5 percentage points to 40.09 percent during 2002. Except for the wealthiest stratum (20 percent) of the population, which committed a marginal 1.6 percent more of total expenditure to the purchase of food and beverages, all other strata spent a substantially lower proportion of total expenditure on food and beverage during 2002. The 12.8 percent decline in food and beverage consumption from US\$2.03 billion to US\$1.8 billion during 2002 was more than twice the 6.2 percent decline in total consumption. Similarly, consumption of meals-away-from-home has declined from US\$548 million to US\$486 million over the same period. Given the present consumption pattern, total consumption and consumption on food and beverage in Jamaica's non-tourism market is expected to, at best, remain stable over 2003 and 2004. Despite the short-term decline in consumption of meals-away-from-home, Jamaica's restaurant market remains very attractive to U.S. food and beverages.

For the first in three years, Jamaica's food and beverage consumption pattern showed an appreciable change during 2002. The most noticeable change was observed in the proportion of food and beverage consumption expenditure that was spent on meals-away-from-home. The proportion of food and beverage expenditure spent on meals-away-from-home peaked at 31 percent during 1999; declined to 27 percent during 2000; remained constant over 2001; and declined by an unexpected 6 percentage points to 21 percent during 2002. The decline in expenditure on meals-away-from-home during 2002 was interpreted as the effect of a general expected consumption reaction to the uncertainties in the Jamaica labor market which has restricted household income. Changes in real mean per capita consumption expenditure (a proxy of household income) will directly affect consumption of meals-away-from-home as indicated by the strong positive correlation (0.83) between these variables. Although fast food restaurants, the largest segment of the restaurant market, have, in general, experienced decrease in the number of patrons per day over 2002 and 2003 cash register sales have increased by virtue of cost controls and menu diversification. Increased government taxes, increasing inflation, and the current public sector wage freeze - which is likely to be largely imitated in the private sector-- will further restrict household income, and consequently consumption of meals-away-from-home during 2004 and 2005. The other observable consumption changes during 2002 included increases in the consumption of meat, poultry and fish; cereals and cereal products; vegetables; and fruit juices. There were marginal consumption declines across a wide array of other products categories.

B. Tourism Market

Jamaica's tourism industry recovered fully during 2003 from the plummet, which occurred during 2001 in response to the terrorist attacks in the United States and the resultant decline in global travel. During 2003, Jamaica recorded historic cruise ship passenger arrivals of 1.1 million, while stopover visitors totaled 1.4 million. The 2003 performance represents a 6.6 percent increase in stopover visitors and an alarming 30 percent increase in cruise ship passenger arrivals, generating a 16.5 percent increase in total tourist arrivals during 2002. When compared to 2000 (Pre-September 11th), stopover and cruise ship passenger arrivals increased by 2.1 and 24.8 percent during 2003, producing an increase in total arrivals to 11.3 percent. The 2.0 million and 2.2 million in total tourist arrivals during 1999 and 2000 were also far surpassed by the 2.5 million arrivals during 2003. The recovery and growth in the industry are heavily skewed toward the cruise ship sector. Excluding 2001 and 2002 as outliers due to negative international influences, cruise ship passenger arrivals to Jamaica have increased by an average 13 percent per year over the last five years relative to a 3 percent increase in stopover arrivals over the same period.

Jamaica's tourism industry is well positioned to experience further growth and diversification over the medium-term. The increasing interest of Spanish investors in Jamaica's tourism sector will significantly expand the available stock of hotel accommodation; diversify the available domestic tourism products; and naturally broaden the source markets. The upscale Riu hotel, which entered the Jamaican market with the construction of a 396-room hotel, is expected to open its new 450-room hotel during 2004, and should commence construction of a third hotel in the near future. The acquisition of property on Jamaica's north central coast by Grupo Pinero to construct three 600-room hotels is closely followed by the acquisition of a similarly size property by A&H investments in the same general area for the construction of hotels to be operated by a Spanish hotel chain. The Barcelo Hotels and Resorts and Grupo Iberostar are both scheduled to enter the Jamaican market with the construction of one 850-room hotel each. With investments of these magnitudes and relatively short time horizon, the proportion of Spanish hotels in the total stock of hotel accommodation is expected to increase significantly from the projected 4.23 percent during 2004 to over 16 percent by 2007. The arrivals of Spanish tourist to Jamaica are expected to grow at an even more

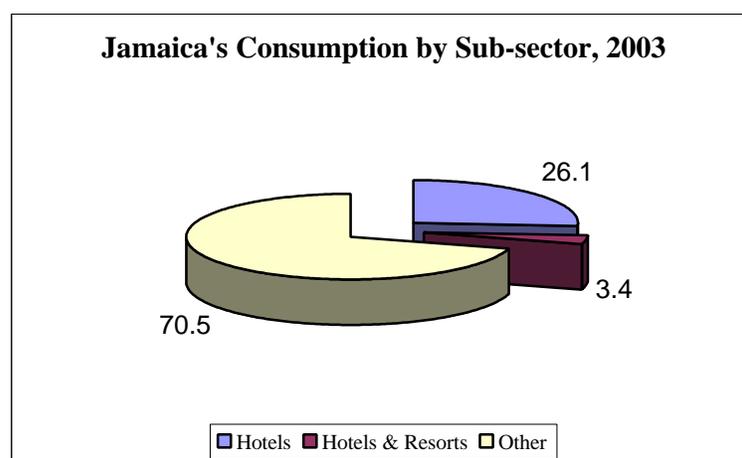
impressive rate over the corresponding period. Despite the decline in global travel during 2001 and 2002, Spain has contributed an increasing number of tourists to Jamaica each year since 2000. In fact, the arrival of Spanish tourist to Jamaica has almost doubled each year since 2000, with actual growth of 92 percent per year.

This development, coupled with the Jamaica Tourist Board's initiative to intensify its marketing efforts in other markets, particularly in European and Asia, should improve performance of the sector, change the demographic composition of Jamaica's tourist arrivals, and diversify the tourism product. The United States accounted for approximately 71.8 percent of total tourist arrivals to Jamaica during 2003, down 4.6 percentage points. European tourist, particularly Germans, British, Italians and Spanish, represented 16 percent of total stopover arrivals during 2003, up two percentage points from the 2002 figures.

With average length of stay of 10.2 nights, average nightly stopover expenditure of US\$98.10 per capita, and average daily cruise ship passenger expenditure of US\$80.6 per person, total food and beverage expenditure in Jamaica's tourism market is estimated at US\$85 million per year. The inclination of U.S. visitors to purchase food items, with which they are accustomed, has skewed approximately US\$62 million of Jamaica's total tourist expenditure towards the purchase of U.S. food products.

The tourism market will remain the fastest growing segments of the HRI sector and will continue to present excellent opportunities for the consumption of U.S. food and beverages. Foods consumed in public institutions (hospitals, infirmaries, schools and prisons) are mostly supplied through government contracts with domestic producers groups, including the Jamaica Dairy Farmers Federation, the Beef Farmers Association, Rural Agricultural Development Authority and the Jamaica Agricultural Society. The Institutions segment of the HRI market is not attractive for U.S. high valued agricultural products. However, bulk, unbranded commodity-type products, and nutritionally enhanced lower valued products can find opportunities in this segment.

Total food and beverage consumed in the HRI sector, excluding institutions, was estimated at US\$571 million during 2002.



C. Factors Affecting Consumption

Macro economic factors that affect consumption patterns are as follows:

Macro Economic Recovery - Should the growth in the economy accelerates or be maintained over a longer horizon, the associated increase in per capita income could generate increasing demand for consumer goods, including food and beverages. Ongoing structural shift in the economy from the productive sector to the service sector will increase Jamaica's dependence on imported products.

Smaller Households - More than 43 percent of households in Jamaica has one or two persons. Almost half (44%) of the two wealthiest quintiles of the population are single member households and 46.5 percent of households in the wealthiest 40 percent of the population are single male households. This continues to help fueling the demand for meals-away-from-home.

Increasing remittances - Total remittances to Jamaica increased steadily over the last 5 years, reaching US\$960 million during 2001. Remittances from Jamaicans overseas contribute significantly to household income / consumption in Jamaica and will continue to support demand for imported products.

Income Disparity - Wealth disparity in Jamaica has fostered the presence of distinct social groups within the society, dictating different norms in communication, social appreciation and consumption pattern among strata. The mean per capita annual consumption expenditure of the wealthiest 10 percent of the population is 12.5 times that of the poorest 10 percent. Further, 38 percent of the total consumption expenditure of the wealthiest one-fifth of the population -- where consumption declines are less apparent -- is spent on food and beverages, translating into a market of approximately US\$730 million.

Declining Goods Production - Consistent declines in the goods producing sector vis-à-vis the services sector have influenced increased dependence on imports. Jamaica's visible trade deficit widens to US\$1.3 billion (22 percent of GDP) during 2002. During the year, exports declined by US\$142.7 million to US\$1 billion while imports increased by US\$38.4 million to US\$2.3 billion. Consumer goods continue to account for an increasing proportion of total imports, moving from 25 percent during 1996 to over 30 percent of total imports during 2002. Food imports, which accounts for the largest proportion of consumer goods imports, increased by US\$20.1 million during 2002, mainly due to increases in imports of meats and cereals.

Fiscal Deficit and Public Debt - Jamaica continues to be plagued by a huge fiscal deficit, which is underpinned by mounting debt servicing. The stock of debt (domestic and international) has almost doubled over a four-year period, moving from US\$6.5 billion (101 percent of GDP) at the end of 1998 to US\$11.4 billion (149 percent of GDP) at the end of 2002. Approximately 62.5 percent of the national budget has to be committed to debt servicing. During fiscal year 2002/03 Jamaica's fiscal deficit climbed to 7.7 percent of GDP. To achieve its target of reducing the fiscal deficit and attain a balanced budget by 2005/06, the Government of Jamaica has implemented one of the highest tax packages in the country's history. Almost 60 percent of the new tax package is expected to come from General Consumption Tax, which coupled with increased inflation and creeping devaluation of the Jamaica currency, is expected to negatively affect consumption in the short-term.

Advantages and Challenges for U.S. Products in the Jamaican Market

Advantages	Challenges
<p>The United States accounts for the overwhelming majority of Jamaica's annual tourist arrivals, creating demand for U.S. high-value products (fruits and vegetables, wines, beef, etc.).</p> <p>U.S. fast food franchises have already dominated Jamaica's restaurant segment and continue to enter the market.</p> <p>The proximity of Jamaica to the U.S., the prevalence of U.S. cable television, and travel has created a distinct preference for U.S. foods and other consumer goods in Jamaica.</p> <p>Seasonality of domestic production and inconsistent quantity and quality of local products creates opportunity for imported products in the HRI sector during certain periods.</p> <p>The growth of the tourism industry and the services sector in general fuels greater demand for imported products.</p> <p>Increasing direct importation by large hotel chains and fast food franchises.</p>	<p>High tariff barriers, strict sanitary/ phytosanitary requirements, burdensome labeling and other standards, and strong government support for domestic agriculture have caused most fast food franchises to revert to some local products, e.g., beef, fruits and vegetables, chicken and fish.</p> <p>Higher prices for U.S. products (e.g., wines, beers and frozen French fries) have caused U.S. products to lose market share to cheaper products from Canada, Chile, Italy, New Zealand and domestic production.</p> <p>Inefficient customs procedure and inadequate refrigeration facilities at the port of entry have reduced the quality of imported perishable products and increased final prices to consumers.</p> <p>Green Globe Certification influences hotels in favor of certain local food and beverages.</p> <p>Advances in CARICOM negotiations will allow cheaper products (breakfast cereals, bakery products, fish and rice) from other CARICOM countries to dominate the Jamaican market.</p>

II. Road Map For Market Entry

a. Entry Strategy

The best way to enter the hotel and traditional/fine dining restaurants segments of the Jamaican HRI food service sector is through an institutional-type local representative. Most independent hotels either do not import or import smaller quantities of specialty products that would not be economical for a local distributor to focus on. Direct sales to local hotel chains can be successful, since in some cases the local purchasing department acts on behalf of branches in other parts of the Caribbean. Most fast food restaurants are involved in direct import and, as such, the best way to enter the fast food segment is direct sales.

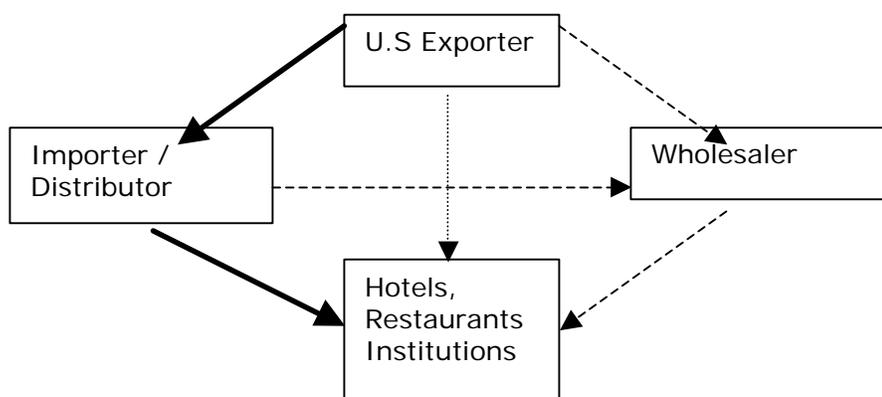
Most traditional restaurants procure a wide variety of imported products from local intermediaries at frequent intervals due to the small quantities demanded. In addition to careful pricing strategies and follow-up product support on the part of the U.S. exporter, the

success of imported products in the HRI sector is highly dependent on the intermediary's knowledge of and focus on institutional distribution.

b. Market Structure

The market structure of Jamaica's HRI food service sector has changed slightly over the past three years, but is still very simple and straightforward.

Structure of the HRI Sector



The three major changes in the structure of the HRI sector -- the increasing direct importation by larger hotels, increased proportion of all-inclusive hotels in the total hotel stock, and the increased emphasis on environmental/eco-tourism -- has resulted from three major factors:

1. Market liberalization and increasing price competition from all-inclusive hotels.
2. The continuous aggressive expansion, promotion and positioning of the all/super-inclusive concept by Jamaica's two largest hotel chains - Sandals and Couples Resorts- and the increasing demand for these products/services by North American visitors.
3. The introduction of Green Globe Certification as a marketing tool in the tourism industry.

Since the late 1990's, all-inclusive hotels have outgrown other hotels by 4.25 percent compared to 2.3 percent. The growth in the number of all-inclusive hotels has exerted pressure on the entire hotel sector to reduce overall cost, and particularly the cost of food and beverages to consumers. To achieve cost competitiveness, approximately 30 percent of the larger hotels, a few with elaborate storage facilities, have started direct importation of consolidated containers of less perishable food products and specialty items that are not available from local intermediaries. Large chain hotels, some with a Caribbean network, import products directly through a central purchasing department. Most hotels still rely on local importers, due to the lack of adequate storage facilities, low quantities demanded of individual products and lack of specialized skills to effectively handle import procedures and logistics.

In the Jamaican tourism industry, the highly desired Green Globe Certification, an eco-tourism thrust, has been changing all aspects of hotel's operations, from architectural design, equipment and furnishings, food and beverage procurement to sporting activities. The certification is based fundamentally on a holistic approach to environmental preservation and tourism. Under the Green Globe Certification, hotels are encouraged to, *inter alia*,

maximize the use of local products, particularly food and beverages. This has sparked an increased propensity by certified hotels to procure products of domestic origin. Five of Jamaica's larger hotels are Green Globe certified and several others are modifying operations to fulfill the certification criteria. The Green Globe concept is widely embraced as an effective tool in targeting the European market.

Local products are typically procured from large highly integrated food processing companies in the case of meat, fisheries products, and frozen and canned products. Fresh fruits and vegetables are procured through agricultural marketing agencies, e.g., the Jamaica Agricultural Society and Rural Agricultural Development Authority. Fast food restaurants acquire local products from food processors and local intermediaries.

c. Sub Sector Profile

Hotels and Resorts

During 2002, hotels accounted for 69 percent of Jamaica's total tourist accommodation, resort villas 15.5 percent, guesthouses 10.86 percent, and apartments 4.35 percent. The total stock of hotel rooms stood at 16,986 during 2002, with all-inclusive and non all-inclusive accounting for 59.84 and 40.16 percent, respectively. The expected completion of a 450-room RIU hotel and a 360-room Sandals hotel during 2004 should accelerate the 1.4 percent growth in hotel rooms during 2003 to over 4.4 percent during 2004. Growth in hotel room is expected to remain within the range of 4 to 5 percent per year over the next three years, reaching a total stock of approximately 20,2386 by 2006/7. Local hotel chains, which are well represented in the stock of hotel accommodation, have been expanding into other Caribbean markets, such as the Bahamas, Cuba, and the Eastern Caribbean. Most existing properties in Jamaica have embarked on ongoing renovation and expansion instead of constructing entirely new properties.

With most hotels currently running occupancy levels of 90 percent, the momentum experienced in the industry during 2003 is expected to continue through 2004. The tourism sector, backed by concerted private and public sector support, is expected to remain a primary growth area in the Jamaican economy, presenting enormous opportunities for the consumption of high-value imported products. In addition to private investment in the tourism sector, public sector efforts to develop Jamaica's south coast into a main tourism area will greatly accelerate growth in the sector. International business and leisure travel drives overall growth in the tourism sector and food and beverage consumption. With U.S. visitors accounting for the overwhelming majority of tourist arrivals to Jamaica, total consumption of food and beverage in the hotel/resort sub-sector will continue to be skewed in favor of U.S. products.

Company Profile

Name of hotel/ Resort	Location	Number of Hotels	Total Rooms	Purchasing Agents
Jamaica Grande	Ocho Rios	1	720	Direct/Importer
Halfmoon Hotel	Montego Bay	1	419	Direct/Importer
FDR	Runaway Bay/ Trelawny	2	172	Importer
Holiday Inn	Montego Bay	1	500	Importer
Super Clubs: Grand Lido	Negril/Trelawny	2	582	Direct/Importer N/A
Hedonism	Negril / Runaway Bay	2	514	N/A
Breezes	Montego Bay/ Runaway Bay	2	400	N/A
Wyndham	Montego Bay	1	487	Importer
Sandals & Beaches Resorts	Ocho Rios / Montego Bay	N/A	2,315	Direct/Importer
Couples Resort	Negril/ Ocho Rios	3	577	Importer
RIU	Negril	1	396	Importer

Restaurants

Name of Restaurant	Type	Location	Number of outlets	Purchasing Agents
Wendys	Fast Food	Kingston	2	Importer
Kentucky Fried Chicken	Fast Food	Country wide	22	Direct/Importer
Pizza Hut	Fast Food	Kingston	4	Direct/Importer
McDonalds	Fast Food	Kingston/ Montego Bay/ St. Catherine	8	Direct/Importer
Island Grill	Fast Food	Country Wide	10	Importer
Norma's	Traditional Family Type	Kingston	2	Importer
Rib Cage	Steak House	Kingston	1	Direct/Importer
Bull's Eye	Steak House	Kingston / Montego Bay	2	Direct/Importer

Fast food restaurants are the single largest segment of the restaurants sub-sector in Jamaica and provide excellent marketing opportunities for U.S. high-value food products. Fast food restaurants account for an estimated 48 percent of total expenditure on meals-away-from-home, amounting to US\$233 million during 2002. Despite the recent declines in consumption of meals-away-from-home, for some U.S. franchises demand customarily exceeds supply during peak hours, limiting the availability of certain augmented services such as home delivery. In Jamaica, fast food restaurants, with relatively less expensive products, provide a convenient and cost effective alternative to certain types of traditional restaurants. The concept also provides an opportunity for low to middle income consumers who desire meals-away-from-home. As Jamaican consumers continue to embrace North American culture, fast food franchises are expected to remain strong in the Jamaican food service market.

Over the last five years more than 30 restaurants have being added to the stock of fast food restaurants in Jamaica and a further 20 restaurants are projected to be added within the next two to three years. During 2001, another U.S. franchise, Churches Chicken, entered the Jamaica market while Taco Bell exited the market. Only a small, uneconomical portion of Jamaican consumers had developed a preference for Taco Bell's products. TGIF (Thank God It's Friday) is slated to enter the Jamaican market during 2004, initially with one restaurant in Kingston. Several Jamaican restaurateurs have also expressed strong interest in joint venture arrangements to introduce Papa John's pizza into the Jamaica food service market.

U.S. fast food franchises are well represented in Jamaica, including Wendy's, Burger King, Popeye's, Kenny Rogers, Kentucky Fried Chicken, Pizza Hut, Domino's Pizza, Churches Chicken, Subway and McDonald's. Two of the most successful local fast food chains, Island Grill and Mother's Restaurant, have experienced reasonable success and expansion. Island Grill, which boasts mostly local Jamaican cuisine, has doubling its total outlets from 5 to 10 restaurants and is now competing directly with the major U.S. franchises. Since opening in 1981, Mother's Restaurant, a hybrid of local and U.S.-type fast food products, has expanded by an average of one new store per year, totaling 22 restaurants across the country. Other local restaurants have recently entered the market and are capturing market share by virtue of their delivery services. In a highly competitive Jamaican fast food restaurant market, most U.S. franchises have modified their menu to meet Jamaican consumers' taste preferences.

It is the general belief by fast food operators, that, while certain segments of the market in the corporate and resort areas are maturing, there are still underserved market segments, particularly in the eastern and western provinces and certain corporate areas that are usually ignored because of social instability.

While mid-level restaurants have lost market share to fast food franchises, fine dining restaurants, which are very few in numbers, are thriving on the country's income disparity, demographic profile (youthfulness) of the employed labor force, and social stratification of the society.

Fast food franchises use between 10-50 percent U.S. food products. The major local products that are used by fast food franchises are beef, chicken, fruit juices, vegetables, eggs and pork products. The major imported products are potatoes, French fries, oils, sauces and salad dressings, bakery products, chicken fillet and cheeses. High duties and questionable sanitary/phytosanitary regulations have created a preference for local meats, dairy products, fruits and vegetables and eggs in the restaurants sub-sector. Fine dining restaurants depend largely on imported high-value / specialty food products.

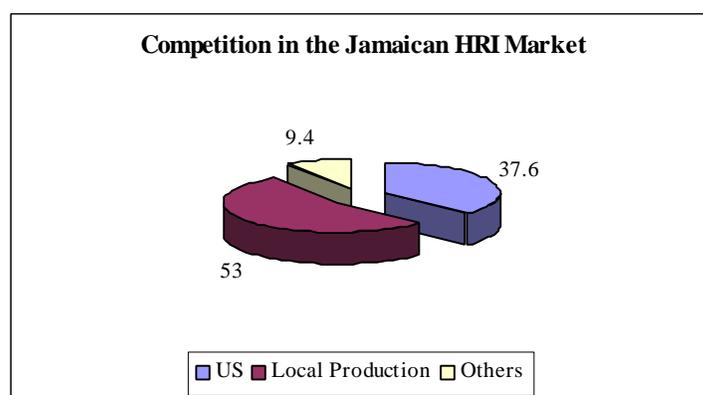
Institution

The Institutions segment of the Jamaican HRI food service sector does not present substantial opportunities for U.S. high-value exports. Institutions demands are typically fulfilled from domestic production.

III. Competition

In general, the primary competition to U.S. products in the HRI food service sector is from local production. Most hotels and fast food franchises source beef, chicken, pork, fruits and vegetables from the domestic market. However, local products typically loose market share to imports due to inconsistent quantity and quality. High-priced U.S. wines have captured only a small share of the estimated US\$21 million market for wines and other alcoholic beverages in the hotels sub-sector. The major competitors to U.S. wines are Chile, Italy, France and Spain. In addition to local production, high-end U.S. beef, lamb and specialty dairy products face competition from Australia and New Zealand. Guyana is the major competitor for U.S. seafood. French fries and whole potatoes from the U.S. have been losing substantial market share to price-competitive products from Canada and the Netherlands. Most sauces, salad dressings, some fruits, vegetables, bakery products and nuts are imported from the U.S. As U.S. products become more expensive, their overall share of the Jamaican HRI food service market could decrease in the medium term. Perceived value (price-quality relationship) is the main variable in the purchase decisions, particularly for all-inclusive hotels.

Imported food and beverages in the hotels sub-sector varies between 40 and 60 percent of total food and beverage consumption, with the U.S. presently accounting for approximately 82 percent of total imported products. The relative size of the restaurants sub-sector and its high consumption of local products have drastically reduced the position of U.S. products in the overall HRI food service sector.



IV Best Product Prospects

A. Products present in the market with good sales potential

In the Jamaican hotel and restaurant sub-sectors, there is high demand for wine, lamb, seafood (fish, lobster, shrimp), special cut beef and veal, pork products, pasta, nuts, cheeses, French fries, potatoes, bakery products, sauces, vegetables and fruits (especially apples, grapes, peaches, pears). Hotels are targeting particular groups that will create seasonal demand for certain products, such as kosher.

Products not present in significant quantity but which have good sales potential.

All sub-sectors of the Jamaican HRI sector have unmet demand for pork products. However, the presence of Pseudo rabies in the U.S. precludes the export of U.S. pork products to Jamaica unless they are hermetically sealed. Specialty cheeses are not available in sufficient quantities to hotels. The demand for seafood and kosher products is greater than supply.

5. Post Contact and Further Information

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Other Sector Report

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