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## **Caribbean Basin**

# **Caribbean Import Market for Poultry Products**

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### **Report Highlights:**

**This report highlights market opportunities for poultry products in the Caribbean Islands. Poultry is the leading food and beverage export item to the islands with an estimated market value of \$150 million. This report focuses specifically on the leading markets of Jamaica, Netherlands Antilles, St. Lucia, and the Bahamas.**

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Includes PSD changes: No  
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Unscheduled Report  
Miami [C11], C1

## Caribbean Market for Poultry

### Overview

Poultry, in particular chicken, are common ingredients in Caribbean cuisine. The relatively higher prices for beef and other meat products further contribute to the popularity and preference for chicken, particularly amongst the poor segments of the population.

Some Caribbean countries, most notably Jamaica and Trinidad, have domestic poultry industries that primarily supply the local market but also export small quantities to other regional markets. Jamaica exported nearly \$300 thousand of fresh and frozen poultry to the Cayman Islands in 1997, while Trinidad exported just a little over \$21 thousand of fresh and frozen product to Antigua, Grenada, and Barbados that same year.

However, the US dominates the large Caribbean import market for poultry, estimated to exceed \$110 million per year (see Table 1). In 1997, the US accounted for 95 percent (\$105 million) of the estimated import market. Much smaller amounts were imported from the EU and Canada. US poultry exports to the region have been increasing, with 1997 exports up 22 percent over 1996 levels and up 64 percent over 1994 levels (see Table 2).

Frozen chicken cuts/offal accounted for the majority (68% or \$71.2 million) of US exports of poultry to the Caribbean in 1997 (see Table 3). Other major poultry products exported that year included: frozen whole chickens (\$13.1 million), frozen turkey cuts/offal (\$7.7 million), fresh whole chickens (\$7.6 million), fresh chicken cuts/offal (\$2.5 million), frozen whole turkeys (\$1.3 million), fresh whole turkeys (\$0.7 million), and fresh turkey cuts/offal (\$0.3 million). Only \$113 thousand of fresh/frozen ducks, geese, and guinea fowls were exported to the Caribbean in 1997.

**Table 1: Exports of Poultry Products to Selected Caribbean Markets from the US, Canada, and the EU (1997, US\$ 000s FOB)**

Markets	US	Canada	EU	Total
Jamaica	18,048	507	-	18,555
Haiti	14,282	17	37	14,336
Netherlands Antilles	11,800	-	259	12,058
Dominican Republic	8,838	13	-	8,851
Antigua and Barbuda	8,432	-	25	8,457
St Lucia	6,517	258	1,086	7,862
Bahamas	6,919	12	37	6,968
Aruba	6,832	-	116	6,948
Bermuda	5,866	-	37	5,903
St Vincent & the Grenadines	2,810	107	1,384	4,301
Grenada	3,279	-	891	4,170
Dominica	3,232	13	166	3,410
Barbados	2,232	238	14	2,484
St Kitts and Nevis	1,459	-	265	1,724
British Virgin Islands	1,259	-	-	1,259
Cayman Islands	834	-	-	834
Anguilla	771	-	52	823
Trinidad and Tobago	637	7	-	645

**Table 1: Exports of Poultry Products to Selected Caribbean Markets from the US, Canada, and the EU (1997, US\$ 000s FOB)**

Turks and Caicos Islands	308	-	7	315
Guadeloupe	161	12	-	174
Montserrat	154	-	-	154
<b>Total Imports from Supplier</b>	<b>104,671</b>	<b>1,184</b>	<b>4,376</b>	<b>110,231</b>

Source: Official export statistics of the US, Canada, and the EU

**Table 2: US Exports of Poultry Meat and Edible Offal (fresh, chilled, frozen; HS 0207), US\$ 000s FOB Value**

	1994	1995	1996	1997
Jamaica	13,076	13,996	16,518	18,048
Haiti	279	5,399	9,710	14,282
Netherlands Antilles	13,227	14,303	10,485	11,800
Dominican Republic	551	1,193	867	8,838
Antigua and Barbuda	6,675	6,092	7,692	8,432
Bahamas	4,766	4,844	5,149	6,919
Aruba	5,404	6,519	5,434	6,832
St Lucia	3,980	4,889	6,840	6,517
Bermuda	5,394	6,029	6,110	5,866
Grenada	1,911	2,406	3,279	3,279
Dominica	807	2,272	3,010	3,232
St Vincent & the Grenadines	1,676	2,301	3,179	2,810
Barbados	1,115	916	1,501	2,232
St Kitts and Nevis	1,724	1,916	2,114	1,459
British Virgin Islands	855	1,008	1,209	1,259
Cayman Islands	470	810	675	834
Anguilla	618	698	803	771
Trinidad and Tobago	703	659	650	637
Turks and Caicos Islands	295	436	409	308
Guadeloupe	89	362	235	161
Montserrat	161	211	221	154
Martinique	64	-	11	-
<b>Total</b>	<b>63,838</b>	<b>77,261</b>	<b>86,099</b>	<b>104,671</b>

Source: NTDB

**Table 3: Major Poultry Products Exported by the US to the Caribbean, 1997, US\$ 000s FOB**

HS Code and Product Description	Export Value to Caribbean	Major Markets	Exports Value to Market
020711 Whole chicken, fresh or chilled	7,646	Haiti	4,233

HS Code and Product Description	Export Value to Caribbean	Major Markets	Exports Value to Market
		Dominican Rep.	1,852
		Bahamas	268
		St. Lucia	227
		Cayman Islands	188
020712 – Whole chicken, frozen	13,086	Dominican Rep.	4,698
		Jamaica	1,744
		Haiti	1,335
		St. Lucia	867
		Antigua	848
		Neth. Antilles	831
		Bermuda	735
		Bahamas	638
		Dominica	426
020713 – Chicken cuts and offal, fresh or chilled	2,468	Bermuda	1,235
		Cayman Islands	297
		Haiti	178
		Turks & Caicos Is.	140
		Jamaica	130
		Neth. Antilles	
020714 – Chicken cuts and offal, frozen	71,153	Jamaica	14,553
		Neth. Antilles	8,131
		Haiti	7,257
		Antigua	7,149
		Aruba	5,669
		Bahamas	4,869
		St. Lucia	4,484
		Bermuda	3,596
		Grenada	3,024
		Dominica	2,697
		St. Vincent	2,299
		Barbados	2,175
		Dominican Rep.	1,373
		BVI	1,234
		St. Kitts	1,049
020724 – Whole turkeys, fresh or chilled	721	Dominican Rep.	319
		St. Lucia	142
		Neth. Antilles	136
		Aruba	57
		Jamaica	26
020725 – Whole turkeys, frozen	1,259	Bahamas	357
		Dominican Rep.	191
		Trinidad	135
		Jamaica	122
		Bermuda	115
020726 – Turkey cuts and offal, fresh or	312	Dominican Rep.	135

HS Code and Product Description	Export Value to Caribbean	Major Markets	Exports Value to Market
<b>chilled</b>		<b>Haiti</b>	<b>63</b>
<b>020726 – Turkey cuts and offal, frozen</b>	<b>7,682</b>	<b>Neth. Antilles</b>	<b>2,373</b>
		<b>Haiti</b>	<b>1,107</b>
		<b>Jamaica</b>	<b>966</b>
		<b>Aruba</b>	<b>916</b>
		<b>St. Lucia</b>	<b>646</b>
		<b>Bahamas</b>	<b>618</b>
		<b>Antigua</b>	<b>224</b>
		<b>St. Vincent</b>	<b>192</b>
<b>HS 020732-36 – Fresh and frozen ducks, geese, and guinea fowls</b>	<b>113</b>	<b>Dominican Rep.</b>	<b>66</b>
		<b>Bahamas</b>	<b>16</b>

Source: Official export statistics of the US, Canada, and the EU

## Jamaica

**Current Suppliers.** According to official Jamaican import statistics, Jamaica imported \$26.4 million (CIF value) of poultry products in 1997. The US accounted for 97 percent of this amount, with most of the remainder supplied by Canada. Frozen chicken backs/necks was the largest import category in 1997 with \$12.3 million recorded. A breakdown of Jamaican poultry imports is provided in Tables 4 and 5.

**Table 4: Jamaican Imports of Poultry Products (1997, CIF Value US\$ 000s)**

	USA	Canada	Other	Total
Whole chickens, frozen	35	-	-	35
Whole turkeys, frozen	109	0	-	109
Whole duck/geese, frozen	100	-	-	100
Poultry cuts, excl. wings, fresh or chilled	14	-	-	14
Chicken/turkey wings, fresh or chilled	4	-	-	4
Fowl backs and necks, frozen	11,921	38	22	11,981
Fowl wings, frozen	83	-	-	83
Chicken cuts, excl. wings/backs/necks, frozen	9,954	14	-	9,968
Other chicken cuts and offal, frozen	1,261	141	-	1,402
Turkey backs and necks, frozen	1,835	696	-	2,531
Turkey wings, frozen	26	-	-	26
Turkey drumsticks, frozen	2	-	-	2
Other turkey cuts and offal, frozen	121	-	-	121
Cuts and offal of duck/geese, frozen	8	-	0	9
<b>Total</b>	<b>25,470</b>	<b>890</b>	<b>22</b>	<b>26,382</b>

Source: Statistical Institute of Jamaica

Note: Exchange rate used (US\$ 1.00 = J\$ 36.25)

**Table 5: Jamaican Imports of Poultry Products (1997, MTs)**

	USA	Canada	Other	Total
Whole chickens, frozen	20	-	-	20
Whole turkeys, frozen	57	0	-	57
Whole duck/geese, frozen	43	-	-	43
Poultry cuts, excl. wings, fresh or chilled	16	-	-	16
Chicken/turkey wings, fresh or chilled	3	-	-	3
Fowl backs and necks, frozen	24,477	71	47	24,595
Fowl wings, frozen	78	-	-	78
Chicken cuts, excl. wings/backs/neck, frozen	12,337	24	-	12,361
Other chicken cuts and offal, frozen	1,324	236	-	1,560
Turkey backs and necks, frozen	2,066	775	-	2,841
Turkey wings, frozen	24	-	-	24
Turkey drumsticks, frozen	1	-	-	1
Other turkey cuts and offal, frozen	65	-	-	65
Cuts and offal of duck/geese, frozen	4	-	0	4
<b>Total</b>	<b>40,515</b>	<b>1,105</b>	<b>47</b>	<b>41,667</b>

Source: Statistical Institute of Jamaica

In addition to the large amount of poultry imports, Jamaica also produced 59 thousand MTs of live poultry in 1997 (Source: UN/FAO), most of which was consumed locally. Local product suffers from a lack of pre-cooling facilities in the fields and a scarcity of refrigerated trucks for transport. Limited tonnage was exported to neighboring Caribbean islands.

**Distribution Channels.** Three basic channels of distribution are used to get imported products to the retail store: distributors/importers; informal commercial operators (ICIs); and direct buying by retailers. Hotels and restaurants purchase through distributors/importers, ICIs and local farmers. A few of the larger hotels and retail chains import food directly through their own purchasing agents. Sources and prices for various chicken products observed during in-store surveys are given in Table 6.

**Table 6: Selected Poultry Products Seen in Various Kingston Supermarkets**

Product	Brand Name	Weight	Price (J\$)	Price (US\$)
Slice	King Fish (Local)	LB	90.72	\$2.50
Legs & Thighs	No Brand (Local)	LB	48.99	\$1.35
Wings	Best Dress (Local)	LB	26.58	\$0.73
Whole	“ “	LB	56.28	\$1.55
Slices	No Brand	LB	58.36	\$1.60
Whole	CB Chicken (US)	LB	119.99	\$3.30
Parts	Best Dress (Local)	LB	64.64	\$1.78
Parts	First Choice Foods	LB	49.50	\$1.37

Source: On-site survey of Kingston supermarkets, December 1998

Note: Exchange rate used (US\$ 1.00 = J\$ 36.25)

**Consumer Preferences.** Domestic production of live birds satisfies demand on the island and this is the preferred purchase amongst Jamaican consumers. Many small vendors also cut the birds up on the shop premises and sell them fresh to the customers. As the local birds are not long-lasting, the frozen cuts are preferred by the supermarkets, hotels and restaurants because of their six to eight-month shelf life and high quality standards. Legs, thighs and breasts were the frozen cuts of

choice, but other items such as ground turkey are supposedly gaining in popularity.

**Import Requirements.** An import permit is required for all poultry products and must also be accompanied by a phytosanitary certificate of clearance. USDA phytosanitary clearance is accepted by Jamaican Customs for poultry products.

**Tariffs and Duties.** As a member of the Caribbean Community, the Jamaican government applies CARICOM's Common External Tariff (CET) to all goods and services imported into the country from non-CARICOM sources. The following charges apply to Jamaican imports of poultry products:

1. Standard tariff rate (see Table 7) – levied against CIF value.
2. Stamp tax (see Table 7) – applicable on certain products, which is levied against the sum of the CIF value and standard tariff amount.
3. General Consumption Tax (applicable on certain products) – levied against the sum of the CIF value and the first two duties. There is no general consumption tax for poultry products.
4. Jamaican Customs “user fee” -- J\$100 (less than US\$3) levied on each imported shipment.

**Table 7: Jamaican Tariff Schedule for Poultry (rates as percentages of c.i.f. value)**

Product	Import Duty	Additional Stamp Duty
Whole chicken and turkey, fresh or chilled	-	-
Whole ducks, geese and guinea fowls, fresh or chilled	40	-
Whole chicken, frozen	40	32.8571
Whole turkey, frozen	40	32.8571
Whole ducks, geese and guinea fowls, frozen	40	-
Geese or duck livers, fresh or chilled	40	-
Chicken or turkey wings, fresh or chilled	40	-
Poultry cuts and edible offal (except livers), fresh/chilled	-	-
Chicken backs or necks, frozen	-	-
Chicken wings, frozen	-	80
Chicken paste, frozen	40	-
Chicken legs, thighs, leg quarters, drumsticks, frozen	40	32.8571
Chicken cuts and offal other than livers, frozen	40	-
Turkey backs and necks, frozen	-	-
Turkey wings, frozen	-	80
Turkey drumsticks, frozen	40	32.8571
Turkey cuts and edible offal (except livers), frozen	40	-
Ducks, geese or guinea fowls cuts and edible offal (except livers), frozen	40	-
Poultry livers, frozen	40	-

Source: *Jamaican Customs Integrated Tariff, 1996*

#### Netherlands Antilles

**Current Suppliers.** Imports of poultry products by the Netherlands Antilles totaled \$9.5 million according to official government statistics (see Table 8). The main supplier of poultry products to the Netherlands Antilles is the US with over

66 percent of import market share in terms of value and 75 percent in terms of volume. The US provides primarily frozen chicken cuts to hotels and restaurants. Cheaper cuts are also imported from Brazil and Trinidad for sale mainly to local customers.

More reliable US export statistics show US exports to the Netherlands Antilles of \$11.8 million in 1997, comprised primarily of frozen chicken cuts/offal (\$8.1 million), frozen turkey cuts/offal (\$2.4 million), and frozen whole chickens (\$0.8 million).

**Table 5: Netherlands Antilles Imports of Poultry, 1997**

Source	Value (US\$ 000s)	Share	Volume (MTs)	Share
US	6,312	66%	3,952	75%
Brazil	1,473	16%	475	9%
Other	613	6%	363	7%
Canada	423	4%	179	3%
Netherlands	346	4%	186	4%
China	156	2%	62	1%
Argentina	89	1%	51	1%
Japan	79	1%	24	0%
<b>TOTAL</b>	<b>9,492</b>		<b>5,292</b>	

Source: Central Bureau of Statistics, Netherlands Antilles

**Distribution Channels.** The usual way of entering the Netherlands Antilles market is by appointing an importer as commercial agent. One agent can normally cover an entire island. Many of the large supermarkets and some of the smaller wholesalers now import some of their food supplies directly from Florida wholesalers. Though these supermarkets account for an estimated 50 percent of retail food sales, there are many small stores or “mini-markets” located throughout the islands for convenience purchases.

Price is the determinant factor behind the increase in share of the supermarket sector, as the small stores cannot compete with the low prices and product diversity that is being offered by the supermarkets. Smaller businesses may survive by carrying a selected number of products for more niche markets, but the trend toward supermarket growth is expected to continue.

**Consumer Preferences.** Frozen, pre-cut poultry, especially legs and breasts of chicken from the US, are most popular with the hotels and restaurants. Local consumers prefer to purchase fresh chicken at the supermarket. Brazilian chicken is popular as it arrives fresh daily.

Bouquet, Golden Phoenix, Southern Beauty and Royal Roast were the four major US brands found on the market during a survey of selected supermarkets in Curacao conducted in December 1998. See Table 6.

**Table 6: Selected Poultry Products Seen in Various Curacao Supermarkets**

Product	Brand Name	Weight	Price naf (Antillian Guilders)	Price naf (US\$)
Whole legs US	Royal Roast	5 lbs	6.50	3.63
Whole legs US	Southern Beauty	5 lbs	6.90	3.85
Broiled chicken US	Golden Phoenix	3 in a bag	9.95	5.56

Product	Brand Name	Weight	Price naf (Antillian Guilders)	Price naf (US\$)
Chicken strips US	No brand name	500 g	7.25	4.05
Whole legs US	No brand name	500 g	2.40	1.34
Soup chicken US	No brand name	500 g	3.65	2.04
Leg quarters US	Rogers Royal (frying)	80 oz/5 lb	6.81	3.80
Drumsticks US	Rogers Royal (frying)	80 oz/5 lbs	6.49	3.63
Wings US	Rogers Royal (frying)	80 oz/5 lbs	6.52	3.64
Whole Legs US	Rogers Royal (frying)	80 oz/5 lbs	6.52	3.64
Back portion US	Bravo cut-up parts	5 lbs	4.27	2.39
Split breasts with ribs US	Bravo cut-up parts	5 lbs	4.89	2.73
Split breasts US	Southern Beauty	5 lbs	11.17	6.24
Wings US	Southern Beauty	5 lbs	8.94-9.89	4.99-5.53
Thighs US	Southern Beauty	5 lbs	6.40-7.19	3.58-4.02
Drumsticks US	Bouquet	5 lbs	4.86	2.72
Drumsticks US	Eagle's non-premium frying chicken	5 lbs	5.86	3.27
Drumsticks US	Southern Beauty	5 lbs	6.70	3.74
Whole chicken BRAZIL	Golden Phoenix	3 x 800g	4.75	2.65
Thighs BRAZIL	Golden Phoenix	1 kg	3.85	2.15
Whole legs BRAZIL	Golden Phoenix	1 kg	3.84	2.15
Drumsticks LOCAL	No brand name	-	10.50	5.87
Wings NL/BEL	LV Lammers	-	2.49/pack	1.39/pack

Source: On-site market survey (US\$ 1.00 = 1.79 Antillian Guilders)

**Import Requirements.** Import registration is required for certain essential products including chicken, chicken eggs and animal feeds (often made of poultry by-products). For animal feeds a special license is required when importing from South America. Poultry products may not contain ingredients that are harmful to health (e.g. antibiotics and hormones). A new Food Act is being prepared. For more information please contact the Geneeskundige- en Gezondheidsdienst (Public Health Authority), Piscaderaweg 49, Tel: 011-5999-625800.

Live animals, meat and meat products are officially inspected and only after approval admitted to the market. The meat and meat products must originate from abattoirs which have been approved by the Netherlands or the Netherlands Antilles. Imports of certain live animals, depending upon the country of origin, are forbidden. Contact the Veterinary Service, Abattoirweg 15, Tel: 011-5999-614000, for further information prior to exporting.

An importer is required to provide two invoices and, when registration is required, a third invoice must be given to the Department of Economic Affairs. An invoice should state the value of the good (f.o.b. or c.i.f.) and other normal commercial information such as marks, numbers, consignee's names, etc.

Four copies of the bill of lading are required, showing the name of the shipper, name and address of consignee, port of destination, description of goods, listing of freight and other charges, number of bills of lading in the full set, and date and signature of the carrier's official acknowledgment of receipt on board of the goods for shipment.

**Tariffs and Duties.** The Netherlands Antilles levies two different import duties: (1) a standard duty rate against the c.i.f. value of a product, and (2) an "economic levy" which applies to products competing against locally produced goods. At present, the Netherlands Antilles does not levy any tariffs against imports of chicken. Other poultry and chicken by-products, however,

do get charged an 18 percent import duty. There is no economic levy applied to any poultry product.

## St. Lucia

**Current Suppliers.** St. Lucia is one of the larger poultry importers in the size island nations that comprise the Organization of Eastern Caribbean States (Antigua, Dominica, Grenada, St. Kitts, St. Lucia, and St. Vincent). Total US poultry exports to OECS members were \$25.7 million (f.o.b.) in 1997, making it a larger combined market than even Jamaica for US exporters. US exports to St. Lucia totaled \$6.5 million (f.o.b.) in 1997. St. Lucia was included in this study as it was considered representative of the other OECS markets.

According to official import statistics from the Government of St. Lucia, poultry imports totaled US\$10.2 million in 1997 (see Table 7), down from \$12.1 million recorded a year earlier. The US had an 80 percent import market share (by value), followed by the UK (14 percent), and Canada (6 percent). Frozen chicken parts/offal account for the vast majority of imports (\$8.8 million or 86 percent of import value in 1997). Nearly \$1.1 million of frozen turkey parts were also imported.

**Table 7: St. Lucia Poultry Imports, 1997 by country of origin (HS Codes 02071-02075)**

	US\$ 000s c.i.f.	Share	MTs	Share
US	8,138	80%	6,386	81%
UK	1,468	14%	987	13%
Canada	575	6%	505	6%
Barbados	18	0%	4	0%
Antigua	6	0%	4	0%
Ukraine	3	0%	2	0%
France	<1	0%	<1	0%
<b>TOTAL</b>	<b>10,210</b>		<b>7,887</b>	

Source: St. Lucia Government Statistics Department

**Table 8: St. Lucia Poultry Imports, 1997 by product type**

	Value (US\$ 000s)		Volume (kgs)	
	1996	1997	1996	1997
Whole poultry, fresh or chilled	1	2	110	463
Whole chickens, frozen	397	124	215,464	59,440
Whole turkeys, frozen	167	148	75,588	58,864
Whole ducks, frozen	47	40	14,878	11,069
Poultry cuts and offal, fresh or chilled	1	3	105	627
Chicken backs and necks, frozen	1,390	1,456	1,941,840	2,090,966
Chicken wings, frozen	1,918	1,928	1,257,290	1,270,059
Other chicken cuts/offal, frozen	6,295	5,387	3,483,236	3,481,094
Turkey backs, necks and wings, frozen	805	844	680,109	711,725
Other turkey cuts/offal, frozen	1,006	255	166,898	196,361
Duck/geese cuts and offal, frozen	23	27	2,216	3,051
Poultry livers, frozen	4	8	2,533	3,250
<b>Total</b>	<b>12,055</b>	<b>10,220</b>	<b>7,840,267</b>	<b>7,886,969</b>

*Source: St. Lucia Government Statistics Department*

Domestic competition in poultry is relatively weak in St. Lucia, but retail enterprises are required to buy 20 percent of their poultry locally before buying from abroad. Domestic chicken production was estimated at 624 MTs in 1997 (*Source: FAO*).

**Distribution Channels.** The largest importer-distributors in St. Lucia include Bryden and Partners, Peter and Company, Renwick and Company, and J.Q. Charles, all of whom are also manufacturers' agents. These companies, with the exception of Renwick and Company, all carry fresh and frozen products as well as dry goods and supply the hotel and restaurant trade as well as retail food outlets.

Because of the relatively large size of St. Lucia's tourist industry, there are also a number of companies that specialize in fresh produce and frozen meats, fish and poultry. These include St. Lucia Cold Storage, Trans-Caribbean Agencies, Evans International, and Chef's Choice Meats. Most hotels buy locally, though large resorts such as the Club Med buy directly from the United States.

In total there are about two dozen wholesalers, many of whom purchase product from the larger distributors as well as buying directly, and in turn supply many of the smaller shops on the island. A number of the independent supermarkets also act as wholesalers for customers who buy in large quantities. J. Q. Charles, one of St. Lucia's main wholesalers, also owns the only supermarket chain on the island, with ten outlets island-wide and another one being built in Vieux Fort in the south of the island. The stores are small by US standards, with only about five aisles each, though the new supermarket will be larger. Julian's is the only other supermarket of any size on St. Lucia, with eight aisles. Julian's imports directly and also acts as a wholesaler.

There are approximately forty other smaller supermarkets or mini-markets on Saint Lucia, some of which import product from wholesalers in Florida in addition to buying from local distributors. These include Lera's, Caribcan, Dilly's, A. F. Valmont and Glace. Many of the independent supermarkets act as wholesalers.

**Table 9: Poultry Products Seen in Selected St. Lucian Supermarkets**

Product	Brand Name	Weight	Price (EC\$)	Price (US\$)
Whole Legs	Newton Farms (US)	1 lb	2.55	0.93
Chicken Parts	Newton Farms (US)	32 oz	9.66	3.58
Chicken Parts	Claxton (US)	2 lbs	4.48	1.66
Wings	Newton Farms (US)	2 lbs	6.98	2.59
Split Breast	Newton Farms (US)	2 lbs	10.98	4.07
Thighs, Legs	Newton Farms (US)	2 lbs	6.98	2.59
Chicken Backs	Newton Farms (US)	1 lb	1.24	0.46
Mixed Parts	Newton Farms (US)	1 lb	2.68	0.99
Wings	Newton Farms (US)	1 lb	2.99	1.11
Wings	Bouquet (US)	2 lbs	8.64	3.20
Wings	Southern Beauty (US)	5 lbs	15.50	5.74

*Source: On-site survey, December 1998*

*Note: Exchange rate (US\$ 1.00= EC\$ 2.70)*

**Consumer Preferences.** In general, importers sell whole frozen chickens to hotels and restaurants, but frozen legs, backs and wings are preferred by retail outlets. There is a high demand for turkey around Christmas time. More than half of imported poultry products are sold to hotels and restaurants. Imports of live chicks from Barbados is increasing at

present as St. Lucian broilers try to increase their stock to satisfy local demand as well as meet some of the tourist demand. Bouquet frozen cuts from the US are very popular as are Somerday International's products, especially wings, from the UK.

Most poultry products are subject to price controls. Reportedly, government inspectors examine invoices to determine if wholesalers and retailers are operating within their allowed mark-up. In St. Lucia importers are allowed a 5.5 percent mark-up, wholesalers 7.5 percent, and retailers 10 to 15 percent. The price controls are widely despised by those in the trade and limit the industry's profitability; some distributors report having their suppliers build a commission into the invoice.

**Import Requirements.** Import licenses are required for most poultry products entering from non-OECS and non-CARICOM member states. For an import license to be granted an inspection certificate must be given along with a veterinarian's clearance. Chicken patties coming from other CARICOM states require an import license.

The principal documents required by the Customs Department are: import entry warrants; commercial invoice; bill or lading or airway bill; certificate of origin; and any required import license. Import licenses can be obtained from: The Customs Department, Customs House, Castries, St. Lucia, Tel. (758) 4522308/7960, Fax (758) 4537526.

**Tariffs and Duties.** St. Lucia is a member of the Caribbean Community (CARICOM) and therefore non-regional imports are charged according to CARICOM's Common External Tariff (CET). However, as a lesser-developed member of CARICOM, St. Lucia is allowed to charge different tariff rates for a wide range of items, including many consumer food and beverage products.

In some cases, tariff rates charged by St. Lucia may actually be below the CET; in other cases, they may be higher or the same. For example, the CET rate for frozen chicken and all other poultry by-products is 40 percent, however St. Lucia allows entry duty-free. The exception being a 5 percent import duty for all edible offal.

St. Lucia also imposes a customs service charge of 4 percent on the c.i.f. value on all imports and a consumption tax of 5 percent, which is calculated as a percentage of the c.i.f. value plus any applicable duty.

## Bahamas

**Current Suppliers.** According to official Bahamian government statistics, the Bahamas imported US\$7.7 million worth of poultry products in 1997 (see Table 10). Total volume for 1997 was 5,727 MTs. The US supplies most of the Bahamas' import requirements. See Table 11 for a breakdown of poultry imports by type.

**Table 10: Bahamas Imports of Poultry, 1997**

	US\$ 000s	MTs	Share
US	7,660	5,725	100%
UK	6	1	<0%
Puerto Rico	1	1	<0%
<b>TOTAL</b>	<b>7,667</b>	<b>5,727</b>	

Source: Bahamas Department of Statistics

**Table 11: Bahamian Imports of Poultry Products, 1997**

HS Code and Description	US\$ 000s	Kilograms
02071100 Fowls of gallus domesticus not in cut pieces fresh/chilled	137	136,840

HS Code and Description	US\$ 000s	Kilograms
02071200 Fowls of gallus domesticus not cut in pieces frozen	265	345,112
02071310 Cuts & offal breast fresh or chilled	64	60,337
02071320 Cuts & offal drumsticks fresh or chilled	62	128,446
02071330 Cuts & offal thighs fresh or chilled	135	322,777
02071340 Cuts & offal wings fresh or chilled	235	274,425
02071390 Other cuts & offal of gallus domesticus fresh or chilled	54	52,857
02071410 Cuts & offal breast frozen	173	128,579
02071420 Cuts & offal drumsticks frozen	138	178,415
02071430 Cuts & offal thighs frozen	594	1,378,763
02071440 Cuts & offal wings frozen	1,105	1,377,344
02071490 Other cuts & offal frozen	526	1,516,231
02072400 Turkeys not cut in pieces fresh or chilled	100	154,787
02072500 Turkeys not cut in pieces frozen	683	793,678
02072610 Turkey breasts fresh or chilled	246	185,232
02072620 Turkey drumsticks fresh or chilled	187	461,290
02072630 Turkey thighs fresh or chilled	20	42,002
02072640 Turkey wings fresh or chilled	1,290	2,805,469
02072690 Other cuts & offal of turkey fresh or chilled	70	122,091
02072710 Turkey cuts & offal breast frozen	260	210,649
02072720 Turkey cuts & offal drumsticks frozen	207	515,219
02072730 Turkey cuts & offal thighs frozen	3	3,493
02072740 Turkey cuts & offal wings frozen	368	742,786
02072790 Other cuts & offal of turkey frozen	215	302,502
02073210 Ducks not cut in pieces fresh or chilled	73	47,229
02073220 Geese not cut in pieces fresh or chilled	2	931
02073230 Guinea fowls not cut in pieces fresh	33	16,731
02073310 Ducks not cut in pieces frozen	105	59,760
02073320 Geese not cut in pieces frozen	11	7,403
02073300 Guinea fowls not cut in pieces frozen	64	38,145
02073400 Fatty livers of ducks geese or guinea fowls fresh/chilled	2	625
02073500 Other ducks geese or guinea fowls fresh or chilled	6	2,685
02073600 Other meat & edible offal frozen	237	186,621
<b>Total</b>	<b>7,667</b>	<b>12,599,454</b>

Source: Bahamas Department of Statistics

**Distribution Channels.** It is estimated that there are less than twenty food wholesalers in the Bahamas, including Asa H. Pritchard, Jagar, D'Albenas, and Nassau Hotel and Restaurant Supply. The Grand Bahamas Food Company and the Thompson Trading Company are two medium-sized wholesalers. The wholesale business is reported to be increasingly competitive as many grocery stores, including warehouse-type discount outlets, are importing direct from manufacturers or through Miami-based wholesalers.

There are over 200 grocery stores in the Bahamas, most of which are small. The three major grocery store chains are City Markets (owned by US-based Winn Dixie), Super Value, and John Chea and Sons. There is also Solomon's, which operates

both as a traditional wholesaler and as a retailer in that it sells directly to the public out of its warehouse, and Costrite, which is similar to a Costco or Sam's Club in the United States. Costrite, which sells apparel and home furnishings along with food, is a membership club which offers food products packed in bulk and/or institutional-sized quantities.

**Table 12: Representative Prices of Poultry Products in Bahamian Supermarkets**

Product	Brand Name	Weight	Price (B\$)	Price (US\$)
Drumstick – Bahamas	Gladstone Farms	1 lb	\$2.39	\$2.39
Thighs – Bahamas	Gladstone Farms	1 lb	\$1.68	\$1.68
Skin/boneless breast – Bahamas	Gladstone Farms	1 lb	\$5.48	\$5.48
Skin/boneless breast – US	Fresh Chicken Farms	1 lb	\$5.48	\$5.48

Source: On-site survey, December 1998

Note: Exchange Rate (B\$1.00 = US\$1.00)

**Consumer Preferences.** Importers have generally sourced produce from the US to meet consumer demand. Frozen parts are most popular amongst consumers. There is some local production of chicken but not nearly enough to satisfy demand, especially for more popular cuts such as wings and legs. Besides consumers find that they can get better prices for US chicken parts (especially legs and quarters) than for locally slaughtered birds. Given the high numbers of US tourists arriving in the Bahamas yearly, importers find it is more essential to provide products familiar to US consumers than to Bahamians.

**Import Requirements.** USDA clearance is required in order to obtain an import permit for poultry entering the Bahamas. Import permits can be obtained by faxed request to Bahamas Customs at (809) 322-6223.

**Tariffs and Duties.** The rate of duty for all chicken, whole/cut and fresh/frozen, has recently been raised to 35 percent, which is the basic ad valorem tariff rate for imported goods. The remainder of poultry products including turkeys, ducks, geese and guinea fowls (whole/cut and fresh/frozen), as well as all poultry by-products remains at 10 percent of c.i.f. value. Chicken eggs are charged a 15 percent tariff and the rate for eggs of all other poultry remains at 30 percent. In addition to these tariffs, imported food products are assessed a stamp tax of 2 percent on the c.i.f. value of the product.