

Voluntary Report – Voluntary - Public Distribution

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Report Name: Exploring Market Potential for United States Pork in Jamaica

Country: Jamaica

Post: Kingston

Report Category: Agricultural Situation

Prepared By: Rasheeda Hall-Hanson

Approved By: Eric Baylor

Report Highlights:

Jamaica's pork market is valued at an estimated \$40 million per year. While domestic production meets household and retail demand, it falls short of supplying the total market. High-demand pork variety meats, such as tails and bellies—primarily imported from Canada and Ireland—highlight these supply gaps. Currently, U.S. pork exports to Jamaica are limited to hermetically sealed (canned) products. Expanding market access to include U.S. fresh and frozen pork would help alleviate persistent supply shortages on the island.

Executive Summary

Jamaica's HRI sector, which largely caters to the tourism industry, imports approximately 60 percent of its food supply. However, stakeholders within the sector have expressed deep concerns over the inconsistent availability of key pork products, including bacon, prosciutto, and chops.

Currently, Canada and Ireland – Jamaica's sole approved suppliers of fresh and frozen pork – account for approximately 85 percent of total pork imports, particularly variety meats, such as tails and bellies. In contrast, U.S. market access remains restricted to hermetically-sealed, canned pork products, presenting a significant barrier to trade expansion, despite strong demand for high-quality fresh and frozen U.S. pork.

In 2022, FAS commissioned a year-long study on Jamaica's pork market, conducted by the U.S. Meat Export Federation (USMEF). The findings highlighted the existence of a vibrant market with significant growth potential, driven by ongoing modernization efforts and robust tourism. Despite these developments, per capita pork consumption remained relatively low at 3.3 kg. The study noted that low consumption may reflect supply constraints rather than consumer preference.

Pork market fluctuations suppress consumption

Jamaica's pork production has historically experienced ebbs and flows due primarily to smaller producers exiting or entering the market depending on feed costs and profitability. Ministry of Agriculture, Fisheries and Mining (MoAF) records indicate that production in 2021, which is the latest data available, reached approximately 7,199 metric ton (MT) carcass weight equivalent (cwe), representing the highest recorded volume since 2018. Between 2011 to 2021, pork production ranged from 6,455 MT and 8,214 MT annually, with hog carcass weights averaging between 52 kg and 63 kg. Total hog slaughter over the same period totaled 117,961 head, equating to 61 kg cwe (see table 1).

Table 1: Jamaica's Annual Hog- Slaughter, Pork Production, and Hog Carcass Weight

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Hog Slaughter	108,568	108,961	142,716	145,000	111,792	101,834	129,559	123,810	124,176	121,999	111,141	117,961
Pork Production (MT carcass weight)	7,973	7,110	7,909	7,500	6,821	6,454	8,214	7,471	7,321	6,962	6,655	7,199
Average Hog Carcass Weight (Kg)	73	65	55	52	61	63	63	60	59	57	60	61

Source: Created using data from Ministry of Agriculture, Fisheries and Mining

In Jamaica, seasonality drives production and processing of pork. Consumer preferences shift towards meats processed from lighter hogs during the Christmas season, while jerk¹ processors prioritize smaller,

¹ Jerk is a style of cooking native to Jamaica, in which meat is dry-rubbed or wet-marinated with a hot spice mixture called Jamaican jerk spice.

more affordable cuts for the retail market. Recent modernization efforts by large-scale producers, such as Caribbean Broilers-Copperwood Brand have facilitated structural shifts from a carcass based-market towards a more cut-based supply business. Meanwhile, jerk processors, which are not large scale, still buy whole carcasses, including feet and tails, though some have started purchasing primal cuts as well.

Jamaica’s domestic pork production stands at around 10 million kilograms of pork per year, which fetches a value of approximately US\$40 million annually. The Jamaica Pig Farmers Association (JPFA), which comprises about 2000 members, suggests that there may be an opportunity for growing the industry as the consumer attitude of pork has evolved over time. Furthermore, marketing drives, such as [#knowyourpork](#)² launched in 2015 by Copperwood Brand, has laid the groundwork for increasing pork consumption in the country.

Jerk pork thrives but pork consumption lags in Jamaica

The USDA’s study of the Jamaican pork market highlighted that pork ranks third as the most consumed meat in Jamaica, trailing poultry and beef (see Figure 1) with average pork consumption at a scant 3.3 kg per capita (see Figure 2). Pork consumption in the country is however, unfavorably impacted by price, negative perception of pork as a suitable protein and religion. Practicing Seventh-day Adventists and Rastafarians, which according to a 2011 census, makes up approximately 11 percent and 1 percent of the population respectively, do not eat pork. In 2022, consumption of pork was higher in other Caribbean nations such as the Bahamas which consumed 23.5 kg, 21 kg (Barbados), 14 kg (Dominican Republic), and 8 kg (Trinidad and Tobago), while global consumption averaged around 25 kg per capita (see figure 3)

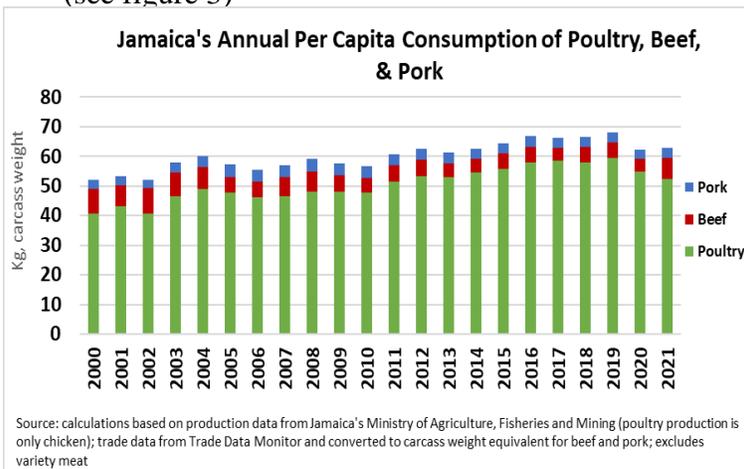


Figure 1: Jamaica’s Annual Per Capita Consumption of Poultry, Beef and Pork-USDA Data

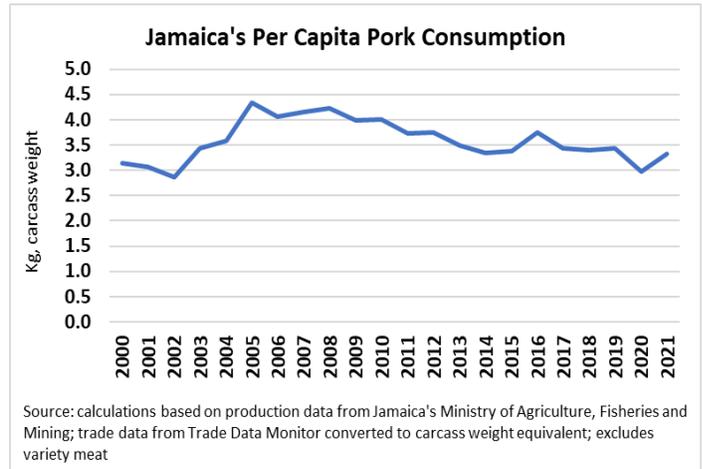


Figure 2: Jamaica’s per capita pork consumption -USDA Data

² <https://www.mycbgroup.com/divisions/cb-foods/copperwood-pork>

Although Jamaicans consume less pork than other meat proteins, the popularity of Jerk pork, which is uniquely Jamaican and renowned for its flavor, is a staple food in Jamaica and on the international culinary scene. Other favorite local pork dishes include stewed pork and stewed peas with pig tails. Jamaicans also prefer bone-in meats, including bone-in pork chops, and smoked chops and ribs, which the food industry prizes.

Jamaica’s pork consumption increases during the Christmas and high-tourist seasons. This impacts the use of pork products, such as ham and bacon. In November 2023, the Government of Jamaica partnered with the Jamaica Pig Farmers Association (JPFA) and launched the *'Pork Jamaica-The Tastier Protein Choice'*³ marketing initiative to invigorate the industry and ensure its sustainability through increased local consumption of pork by illustrating its versatility as a protein option.

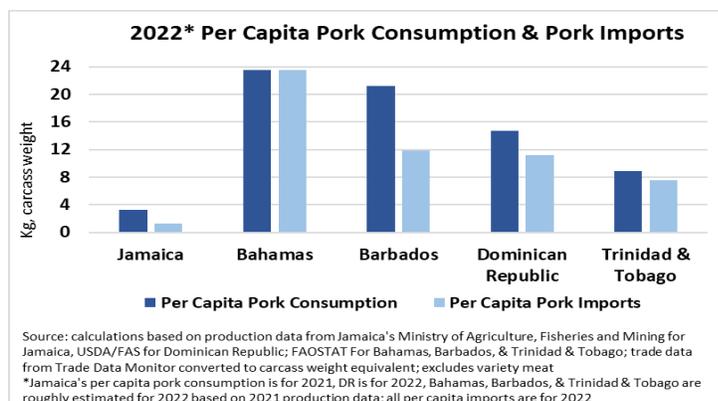


Figure 4: Per Capita Pork Consumption & Pork Imports (2022)-USDA Data

The study also revealed that most pork consumed in Jamaica is produced locally. In 2021, per capita consumption of domestic pork on a carcass weight basis was 2.55 kg. Between 2011 and 2022 consumption from domestic pork production declined by 2 percent and ranged between 2.31 kg and 2.93 kg over the last decade. Total per capita pork consumption, inclusive of imports, has decreased from 3.73 kg in 2011 to 3.3 kg, with consumption levels varying between 2.97 kg and 3.75 kg over the period (see table 2). Over the same timeframe, pork self-sufficiency-excluding variety meats- has ranged between 68 percent and 70 percent (see table 2).

Table 2: Jamaica’s pork consumption and self-sufficiency

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Pork Production (mt, carcass weight)	7,110	7,909	7,500	6,821	6,454	8,214	7,471	7,321	6,962	6,655	7,199	
Pork Imports (mt, converted to carcass wt)	3,135	2,447	2,173	2,486	2,982	2,266	2,199	2,246	2,715	1,724	2,199	3,661
Pork Consumption (mt, carcass weight)	10,245	10,356	9,673	9,307	9,436	10,480	9,670	9,567	9,677	8,379	9,398	
Domestic Self-Sufficiency	69%	76%	78%	73%	68%	78%	77%	77%	72%	79%	77%	
Domestic Consumption per Capita (kg)	2.59	2.87	2.70	2.45	2.31	2.93	2.66	2.60	2.47	2.36	2.55	
Imported Consumption per Capita (kg)	1.14	0.89	0.78	0.89	1.07	0.81	0.78	0.80	0.96	0.61	0.78	1.29
Pork Consumption per Capita (kg)	3.73	3.75	3.49	3.34	3.38	3.74	3.44	3.40	3.44	2.97	3.32	

Sources: Domestic production from Jamaica Ministry of Agriculture, Fisheries and Mining; Imports are reported exports to Jamaica from Trade Data Monitor converted to carcass weight; Population from Euromonitor International; all calculations exclude variety meat

³ <https://jis.gov.jm/campaign-to-increase-pork-consumption-launched/#:~:text=The%20Full%20Story&text=The%20marketing%20initiative%2C%20dubbed%20Pork.pork%20as%20a%20protein%20option.>

Regulations and Trade

Jamaica regulates and controls trade of animals and animal products under the Animals (Diseases and Importation) Act. The import of animal and animal products, including pork, are controlled through import permits through a process managed by the MoAFM, and imports are also subjected to significant duties.

Jamaica maintains that it is self-sufficient in pork production for fresh cuts but there is a paucity of variety meats like tails and bellies which are generally in high demand. Presently, Canada and Ireland enjoy access for pork muscle cut and pork variety meats (see table 3). Nevertheless, since 2021, import permits have only been granted for pork bellies and tails to fill the local demand for these products which are usually in short supply.

Over the last three decades, Jamaica has banned fresh and frozen pork from the United States due largely to perceived phytosanitary concerns surrounding diseases, such as Porcine Epidemic Diarrhea Virus (PEDv) and Pseudorabies (PRV). As such, the United States has virtually no market access, outside of canned products.

On the export side, Jamaica occasionally sells small quantities of pork to Barbados, Cayman Islands, and the United Kingdom; however, data on Jamaica’s full pork exports remain limited or non-existent.

Table 3: Global pork and pork variety meat exports to Jamaica (MT)

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Total	2,491	2,025	1,776	1,999	2,391	1,808	1,734	1,847	2,144	1,410	1,737	2,988
Canada	2,034	1,628	1,546	1,736	2,187	1,621	1,368	1,556	1,918	1,230	1,489	2,322
Ireland	400	247	100	133	99	136	187	174	129	25	140	565
U.S.	56	75	128	130	105	51	176	86	80	97	108	101

Source: Trade Data Monitor (Data is in product not carcass weight; United States has access for hermetically sealed products)

Future consumption trends to power demand for U.S. pork

Jamaica’s continued investment in the tourism industry is fueling rapid expansion in the medium and long term. This growth will likely drive a corresponding increase in the HRI sector resulting in increased demand for food, including pork. Pork products, such as tails, bellies, ribs, trim, and prosciutto will no doubt be in greater demand to meet the expansion of the HRI industry.

Tails, bellies, ribs, and trims are also important in the processing sector and demand is forecast upward for these items by manufacturers. Key industry actors have mentioned that prosciutto remains in limited supply as it is not produced



locally due to high production costs. This product is a staple protein on menus at many international hotels which is important to maintain their brand standard. Considering the deficiencies in supply of certain pork cuts, the United States is well positioned to meet the demand for unavailable fresh and chilled pork products in Jamaica.

Attachments:

No Attachments.