



Foreign Agricultural Service

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Cuba

HRI Food Service Sector

Report

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Report Highlights:

The Republic of Cuba's hotel, restaurant and institutional sector is an estimated \$100 million market served by European, Canadian, Mexican and Latin American products. If current political strains continue to ease, U.S. food service suppliers should receive a lion's share of the market with our quality and wide variety of product, quick response time and close proximity to Cuba. In addition, U.S. products are well known and appreciated, even though they are not readily available at this time.

Includes PSD changes: No
Includes Trade Matrix: No
Unscheduled Report
Miami [C11], CU

SECTION 1: MARKET SUMMARY

The Republic of Cuba is the fastest growing and second-most visited tourist destination in the Caribbean, with a reported 1.8 million tourists in 2000. Tourism is the largest industry in Cuba, accounting for an estimated \$2 billion in revenue in 2000, according to the government of Cuba. In addition to the tourists, Cuba has 12 million people, many of whom eat at small restaurants, snack stalls and cafeterias about once a week. The food service industry needs an estimated \$70 to \$100 million in food products, of which 90 to 95 percent is imported.

Cuba has 38,000 hotel rooms, 700 restaurants and 10,000 small in home restaurants called "Paladares" to meet the needs of the tourists and Cubans alike. Tourists on a budget and those seeking the excitement of discovering a relatively new destination find Cuba very attractive. The growth in the tourism sector is further fueled by recent changes in Cuban government policies encouraging foreign investment in hotels. In addition, the food service industry is expanding as a result of government policies encouraging private and joint foreign ownership of restaurants.

About 30 percent of Cuba's 38,000 hotels are jointly owned by companies from Spain, Canada, Germany, Holland, Italy, Colombia, and Jamaica. In addition, the Cuban government's allowance of foreign joint ownership in restaurants has encouraged the development of independent restaurants and restaurant chains. Allowed to exist since 1994, more than 10,000 homes serve food to tourists and locals in their Paladares, typically charging in U.S. dollars.

Cuba's food service sector is heavily reliant on the tourism sector. The U.S. Department of the Treasury estimates that 138,000 U.S. citizens and persons subject to the jurisdiction of the United States visited Cuba legally in 2000. The majority of the U.S. visitors were of Cuban descent and were visiting family and friends. The Cuban Ministry of Tourism reports 200,000 U.S. visitors for the same time period. Numbers of tourists by nationality in 2000 were reported by the Cuban government as follows: Canada (308,000), Germany (203,000), United States (200,000), Italy (176,000), and Spain (153,000). Significant numbers of Mexicans, Argentinians and Brazilians visited Cuba as well.

The Cuban government reported a rise of 11 percent in the number of tourists in 2000 over 1999 and tourism in the first quarter of 2001 showed similar increases over the same quarter in the previous year. However, the tourism industry is suffering from the worldwide economic difficulties and political situations in the second half of 2001. Already this year, two taxi companies closed, taking 2,000 taxis off the street. In addition, 11,000 of Cuba's 38,000 hotel rooms have closed temporarily.

Most of Cuba's imported food service needs are met by Canadian, Spanish, Italian, Mexican, Argentinian and Brazilian suppliers. The governments of these countries offer various programs to encourage trade such as such as financing programs, export subsidies or barter arrangements. The U.S. government allows the commercial export of all U.S. food products to Cuba under the Trade Sanctions Reform and Export Enhancement Act (TSRA), subject to an interim ruling that expedites the approval process for U.S. exports. Transactions must be on a cash basis or with financing through a third country individual or institution.

Cuba's 12 million people are a vital part of the restaurant sector. The Cuban government estimates that 56 percent of Cubans have access to U.S. dollars. Cubans receive U.S. dollars primarily by working in the tourist sector or by receiving remittances from Cuban Americans.

Although the Cuban government designated 67 areas for tourism development, the main focus lies on eight areas: the city of Havana, the beach resort areas of Varadero, Cayo Coco, St. Lucia and Northern Holguin, the island of Cayo Largo, the city of Santiago de Cuba and the UNESCO World Heritage site of Trinidad. High priority is given to all-inclusive vacations, yacht charter programs, full service scuba-diving centers, fly-drive vacations, eco tourism, and incentive travel. Cruise terminals, golf courses, independent restaurants and entertainment facilities are being planned. Cuba is also trying to offer more domestic air service and improve the tourist sector management, service and food quality.

Table 1. Advantages and Challenges of Exporting Food Products to Cuba

Advantages	Disadvantages
The U.S. government allows companies to export all U.S. food products, with the exception of bottled water, to Cuba.	The Cuban government demands U.S. government finance programs before it will import U.S. food products.
The United States and Cuba agreed to a "one time" export of \$35 million of U.S. wheat, poultry and rice in November 2001.	With their own government finance programs in place, Canada, Italy, Germany, Mexico and other countries export freely to Cuba.
Cuba's proximity in time and distance via shipping lines make the United States an attractive and cost competitive partner; Cuba is 90 miles from Key West, Florida.	No regularly scheduled shipping services are yet available from the United States to Cuba, although several lines are U.S. government-approved to do so.
Numbering a reported 1.8 million in 2000, Cuba has the second largest number of tourists in the Caribbean.	The tourists are primarily from Canada and Europe and prefer food products from their own country when they are visiting.
Cuba's food service import needs are estimated at \$70 to \$100 million.	Canadian, European and Mexican products dominate the market.
Cuba's food service industry knows and respects the high quality of U.S. products.	Cuba's underdeveloped distribution system limits the variety of good quality products on a consistent basis.
Cuba's government is encouraging growth in the tourism sector.	
The allowance of Paladares and joint venture restaurants has further sparked the local and tourist demands for food service items.	

SECTION II: ROAD MAP FOR MARKET ENTRY

A. Market Strategy

Establishing a relationship with an importer in Cuba is probably the most important step in entering the Cuban market. Understanding the steps the importer must take in order to bring the product into the country and how the product is distributed is equally important. The Cuban way of doing business is very foreign to a stable trading environment so trust in the trading partner is extremely important for both parties. In addition, international trade is a relatively new concept for Cuba who, for decades, relied on arrangements with Russia to meet most of their needs.

In June 2002, the government of Cuba announced that Alimport, the government operated Empresa Cubana Importadora Alimentos (Alimport), would be the exclusive importer for food and agricultural products sourced directly from the United States. Prior to this announcement, a few other government companies were importing as well. In fact, 50 to 100 foreign joint venture importers were also importing for the Cuban government companies. They are now banned from importing U.S. food and agricultural products directly from the United States under provisions of the TSRA. Please note that U.S. food and agricultural products continue to be imported to Cuba through third countries, but these are not TSRA-authorized transactions.

It is uncertain how long Alimport will remain the sole importer of U.S. agricultural goods. Foreign suppliers prefer to work with the joint venture importers because they are reported to be more reliable and quicker to pay. The joint venture importers have many more restrictions than Cuban owned companies. Some private foreign owned companies, who face even greater restrictions than the joint venture companies, bring in non U.S. product through a bonded system.

A typical contract is 90 days credit with a letter of exchange. Business is not usually done with a letter of credit. The 90 day credit is often stretched to 120 days credit or longer.

With a license from the U.S. government and a visa from the Cuban government, U.S. companies are allowed to travel to Cuba to seek new business. Many U.S. companies have already established relationships with key importers and have registered their trademark so that they are ready to jump in if the market opens further. Some companies registered their brand name many years ago: Aunt Jemima in 1918, Hershey's Kisses in 1923, Tabasco in 1931, Kraft in 1949, Quaker Oats in 1951 and Mr. Peanut in 1962, to name a few. Approximately 4,000 U.S. food and non food product trademarks have been registered within the Republic of Cuba. Several companies in Cuba register trademarks and their contact information is listed at the end of this report. Legal representation in Cuba is strongly advised.

Please note that all of the U.S. companies involved in the \$35 million in "emergency" sales of U.S. agricultural products in November 2001 had well-established relationships with President Fidel Castro and Alimport. From January 2002 through June 2002, Alimport purchased (on a cash basis) US\$102 million in food and agricultural products under provisions of the TSRA. Some of these sales were from suppliers without well-established relationships.

A handful of U.S. consultants offer their services to meet key players in Cuba. Many state Governors have led exploratory trade missions to Cuba and have invited Cuban buyers to their state so that their companies have the opportunity to meet key players and understand the market.

B. Market Structure

The distribution channels for the food service industry are complex. Most of Cuba's food needs are imported by the Cuban government-operated Empresa Cubana Importadora de Alimentos (Alimport) under the auspices of the Cuban Ministry of Foreign Trade. Alimport handles imports of all food and agricultural products coming directly from the United States. However, outside of purchases from the United States, Alimport is responsible for meeting domestic consumption needs, including ingredients for food manufacturers, rather than products for the retail or food service industry. Cimex, Cuba's largest government company, Cubalase, Cubanacan and others import food products for the retail stores.

Food needs of the food service industry are met by imports from government companies who own hotel chains, foreign joint venture importers who import for the government companies, and foreign owned private importers. Food service operators also buy from local agricultural cooperatives and manufacturers. The hotel companies may go through Cimex for their imports since Cimex's buying power is larger and import expertise is much greater. Chefs and F&B managers use all three sources since no one company has a consistent supply of products of the quality they need. Most of Cuba's foreign joint venture hotels (representing about 30 percent of Cuba's hotels) have foreign chefs and food and beverage managers. It is estimated that the government company imports account for 40 to 60 percent of the food service sector's needs, foreign joint venture importers 35 to 65 percent and local products five to 10 percent.

Lower transportation costs, shorter shipping times, the ability to quickly meet any food service needs, Cuban familiarity with U.S. brands and recognition of our high quality standards should give U.S. companies a tremendous advantage once the market opens up. Current ordering and shipping from Europe take 45 days. The shipping time from the United States varies from 18 hours from Miami to a maximum of six days from other U.S. ports. Recent shipments out of New Orleans, LA and Gulfport, MS reached Havana's port in two days.

Home to about 20 percent of Cuba's 12 million people, Havana is the largest market for food service sales. Varadero, with three quarters of the tourist hotels, is the second largest market. Havana has adequate distribution with the aid of an international sea port and airport. The Port of Havana has capacity for 131 refrigerated containers and is building more with Spanish joint venture investments.

For products going to the cities of Santiago de Cuba, Cienfuegos, Camaguey, Holguin and Matanzas, it is often easier to transport the food by ship since ships are more plentiful and less expensive than trucks. Most beach resort areas receive food products by truck since they are relatively close to Havana. The tourist areas offering the best opportunities are Varadero, Havana's Playa del Este, Guardalavaca, and Santa Lucía.

The Cuban government does what it can to meet the product needs for this very important sector. A

recent article in U.S. press gives the example of Sol Elite Palmeras, one of the largest and high end hotels in Varadero. The hotel buys \$1,000 of fresh fruit and vegetables a day primarily from a Canadian farming subsidiary and Frutas Selectas, a state firm that chooses the best fruit for delivery to upscale hotels, restaurants and stores.

C. Sub-Sector Profiles

1. Hotels and Resorts

Cuba is the second most visited tourist destination in the Caribbean. Its higher growth rate in the number of tourists could soon allow it to overtake the Dominican Republic as the most visited place in the Caribbean. The Cuban government reported 1.8 million stay over visitors in 2000 and a growth rate of 11 percent over the previous year, while the Dominican Republic had 2.4 million tourists and a growth rate of only 8 percent over the previous year. By allowing local and foreign joint private ownership of hotels and restaurants, the government of Cuba wants to take full advantage of the dollars tourists bring.

Of Cuba's 38,000 hotel rooms, about 50 percent are beach resorts and one third are located in the four major cities of Havana, Santiago de Cuba, Camaguey and Holguin. The remaining 20 percent focus on Cuba's natural, historical and cultural attractions such fishing, hiking, Spanish monuments and architecture, and a variety of cultural events such as Carnival.

The typical tourist purchases an all-inclusive package. However, hotel accommodations range from basic "peso hotels," typically used by locals, to all-inclusive five star resorts. Additionally, "aparthotels" have rooms with kitchens, "villas" are typically fully staffed and "protocolos" are special houses reserved for foreign dignitaries. "Casas particulares," private family homes, have grown in number and popularity since the Cuban government allowed each house to rent out up to two rooms in 1996.

Typical hotels offer a restaurant, bar and often a pool side bar. One of the nicest resorts, Sol Elite Palmeras, has accommodations for 1,200 tourists and has seven restaurants. Poor service concerns are being met by hotel management training schools run by the Austrians and by sending managers for training in Cancun. Low season is May to June and September to November; high season is December to April and June to August.

Cuba's most popular resort cities are listed in the table below:

Table 2. Number of Rooms in Beach Hotels and Resorts

Location	Number of Rooms
Varadero	9,343
Havana, Playas del Este	1,615

Guardalavarca	1,560
Santa Lucía	1,200
Santiago de Cuba	922
Isla de La Juventud Cayo Largo	845
Cayo Coco	658
Matanzas (city)	648
Granma	584
Santi Spiritus	523
Cienfuegos	439
Pinar del Rio	220
Ciego de Avila	180
Total Beach Hotel and Resort Rooms	18,744

Tourists come to Cuba to enjoy the beautiful beaches and sun. As indicated above, Varadero has almost three quarters of the island's hotels. It's 13 mile long beach on the North Coast is just as trendy as it was before the revolution. Many call it the little Cancun or Miami's South Beach with plenty of nice hotels, water sports, scuba diving and night life. It is about 85 miles west of Havana and is accessible by plane, train or automobile. It is so close to Florida that one can tune into Miami radio.

The second largest concentration of hotel rooms is in Playas del Este, a thirty minute drive from Havana. This beautiful beach is very popular with Cubans who share the hotels with the tourists. Guardalavarca, about 35 miles northeast of Holguin, has two beautiful beaches: Playa Mayor and Playa Las Brisas. All of Guardalavarca's hotels are run by the Cuban government entity Cubanacan. Not surprisingly, the next largest concentration of hotel rooms is along another beach, St. Lucia, located in the northeast corner of Camaguey. Hotel guests are primarily German, Italian and Canadian charter groups.

Table 3. Hotels Located in the Urban Centers of Havana, Santiago de Cuba, Camaguey, and Holguin

Location	Number of Rooms
Havana	7,495
Camaguey	1,529

Santiago de Cuba	1,485
Holguin	742
Total Urban Hotel Rooms	11,251

Hotel guests in Cuba's four largest cities, Havana, Santiago de Cuba, Camaguey and Holguin are a mix of 10 to 20 percent business people and the remainders are tourists. Tourists are drawn to the cities by the many architectural, historical and cultural sites.

About 70 percent of the hotels, representing more than 27,000 rooms, are owned by the Cuban government. The government companies that own these hotel chains import food products for their hotels. They work both independently and together to try and meet the needs of their hotels.

Table 4. Major State Owned Hotel Chains

Hotel Name	Number of Rooms
Cubanacan	8,707
Horizontes	7,619
Gran Caribe	6,217
Gaviota	1,427
Marinas Puerto Sol	390
Total Number of Rooms in Major Government-owned Hotel Chains	24,360

Each of the five companies has distinct characters. Cubanacan is by far the largest of the companies with interests also in restaurants, marinas, buses, and rental cars. It also has interests in many of the joint venture hotels such as Melia, Grupo Sol, LTI, Golden Tulip and SuperClubs. Horizontes owns primarily two and three star hotels. Gran Caribe owns primarily four and five star hotels. Gaviota is the VIP service provider offering health tourism for wealthy tourists, several dozen deluxe resorts, tour buses and car rentals. Many of their properties, including aircraft and resorts were once owned by the military. Marinas Puerto Sol owns two star and domestic hotels for tourists and locals. In addition, a company called Rumbos provides tourist areas with restaurants, coffee shops, highway rest stops, and airport services.

A number of foreign companies have invested in Cuba's hotel sector. They own about 30 percent of the hotels with the Cuban government. The investors bring valuable and extensive hotel operating practices, investment and marketing skills to Cuba. New rooms currently being built will quickly outdate the table below.

Table 5. Joint Venture Hotels between Foreign Investors and the Cuban Government

Foreign Company Name	Country of Origin	Number of Hotels	Number of Rooms
Melia	Spain	12	3,100
Grupo Sol	Spain	5	1,831
Guitart	Spain	4	1,822
LTI	Germany	5	1,097
Kawana	Spain	3	904
Iberostar	Spain	3	793
Delta	Canada	4	735
Hotels C	Spain	4	662
Golden Tulip (Cubanacan)	Holland	2	452
Common W	Canada	3	282
SuperClubs (Cubanacan)	Jamaica	1	270
RUI	Germany	1	151
Forte Hotel	Colombia	1	120
Press Tour	Italy	2	116
Viaggi	Italy	1	95
Total Hotels and Rooms		51	12,430

Most joint venture hotels have foreign management, chefs and F & B managers. Food purchasing decisions are made between the chef and/or F & B managers. Because so few Cubans have practical training or experience in managing a restaurant, the foreign staff usually has more responsibility for operating the restaurant and training the staff.

2. Restaurants

Many types of restaurants are available for tourists, always in dollars. The Cuban government took over all restaurants in 1967 and offers about 700 restaurants to tourists inside and outside of hotels. In addition, about 10,000 Paladares feed locals (often for dollars) and tourists (always for dollars). "Peso eateries" are geared for locals but welcome tourists and include restaurants, state run lunch counters

and private snack stalls. Typical Cuban food, or "comida criolla," is pork and cheese sandwiches, black bean soup, white rice, steak, fried plantains and yucca. Whether Cuban or Continental, the major constraint for restaurants is the limited availability of quality food ingredients to prepare the items on their menu.

Fast food chains are limited to a fried chicken chain called El Rapido and a hamburger chain called Burgui. Both offer food for dollars only. The many restaurants, a snack bar chain, and coffee shops owned by Rumbos S.A. serve traditional Cuban food. State owned pizza stalls are found throughout Cuba. A French interest bakery chain called Pain de Paris has several outlets in Havana.

Pre 1959, Havana was known as a city full of culinary delights and is trying hard to regain that reputation. Foreign joint venture hotel restaurants have foreign chefs and tourists can dine on Cuban, Continental, Spanish, Chinese, Italian, and Arabic cuisine. Unfortunately, local chefs graduate from Formatur, the culinary training schools, with little knowledge of the quality and taste of fine international cuisine since it has not been available for a long time. However, some Cuban chefs are sent to Europe to study.

Well-known restaurants are available in every major city, as outlined in the table below. Restaurants typically buy their products on a daily basis from refrigerated trucks that arrive with a variety of products from the government companies, private companies and produce from the quasi-government cooperatives. With inconsistent supplies and quality, restaurants have a tough time working from a set menu. Restaurants and hotels try to have sufficient cold and dry storage facilities to buy large amounts of a particular product when it is available.

Table 6. Well-known Restaurants by City

City	Well-known Restaurants
Havana	La Cecilia, El Aljibe, La Divina Pastora
Cayo Largo	Cabaret Rumayor, Cabaret Cuevas de Vinales, La Taberna
Matanzas	El Canelo, El Ranchon, Play Larga
Varadero	La Taberna, El Bodegon Criollo, Las Brasas
Cienfuegos	Finca Isabella, Cueva del Camaron, Casa del Pescador
Villa Clara	Los Caneyes del Rio Negro, Jibacoa, Sancti Spiritus, Casa de la Gallega, Los Vitrales, El Cubano
Ciego de Avila	Jardin de Apolo, La Trocha, Rincon Campesino
Camaguey	El Pollito, Las Brisas, Puerto Principe
Las Tunas	El Molino, La Bodeguita, Las Delicias

Holguin	La Nina, El Cayuelo, Sofia
Granma	La Yanagua, El Yarey, Las Americas
Santiago de Cuba	El Cerdito, Casa de Don Antonio, El Rodeo
Guantanamo	Duaba, La Punta, La Rusa

One of the most exciting developments in Cuba's food service sector is the Paladares. Havana is home to 9,000 of the 10,000 Paladares that have sprung up since 1994. All are limited to 12 seats, employ family members only and buy and sell food in dollars. Some are open 24 hours. Paladares, plural for "paladar," means palate.

Although most Paladares sell Cuban food, some specialize in Chinese, Italian, and other ethnic cuisines. Paladares come and go, as the government taxes are relatively high and they are under strict government scrutiny. The prices are less expensive than formal restaurants and are popular with locals and tourists.

Cubans are quite familiar with a dollar economy. They receive U.S. dollars working in the tourism trade and from remittances from relatives and friends in the United States. Even though the majority of the Cubans work for the state and the state dictates where one will work, Cubans are drawn from the agricultural-based countryside to the larger cities for the chance to work in industry and the tourism's dollar economy. Havana and Santiago de Cuba, the largest cities, are seen as offering the most opportunity for the rural population so the cities are growing rapidly.

3. Institutional Sales

All institutional sales are handled by government buying agencies, such as Alimport, Cimex, and Cubanacan. Schools have a free lunch program but the quality and quantity of food varies significantly. Food and medical product donations are desperately sought by Caritas, an agency of the Catholic Church who organizes donation programs for the Cuban government. Many non profit groups in the United States and other countries work with Caritas and the Cuban government to provide donations to Cuba's poor and needy.

Donations of agricultural commodities, meeting the requirements and procedures, are eligible for export and re-export to Cuba under License Exception AGR. For more information on this process, please see the final section of the report for specific website addresses.

SECTION III: COMPETITION

It is very likely that if trading channels were freer, U.S. products would take the lion's share of the market because of the short shipping distance, availability of a wide range of high quality products, familiarity with U.S. products and quick turn around time for orders.

All imports are subject to duties, typically less than 20 percent for food products. The full range of Canadian, Italian, Spanish, Mexican, Brazilian and Argentinian food service products dominate the market. Although chefs recognize the quality of U.S. food service food products, they are unavailable.

In general, the Cuban government purchases rice from China, Thailand and Vietnam. Wheat, wheat flour and poultry are imported from Canada and France. Cuba imports very little beef or pork. Vegetable oil originates from Argentina and China. The greatest competition for fresh fruits and vegetables is from Canada, Holland, Mexico and Chile. Dairy products are imported from the EU and New Zealand. Processed foods originate from Canada, EU and Mexico. Wines are typically from France and Chile.

It is estimated that Cuba's domestic food production accounts for only five to 10 percent of the food service's food needs. Cuba's agricultural sector produces citrus, pork, shrimp, lobster, tobacco, coffee and sugar cane on a commercial scale. However, with only 12 percent of its arable land committed to food crops for the domestic market and the rest devoted to export crops, Cuba must import most of its food needs. The emphasis on export earnings can make life complicated for a restaurateur. For example, a Canadian joint venture has a monopoly on lobster production. When fresh lobster is not available, Cuba will import frozen Cuban lobster from Canada for the food service sector.

Small farms provide basic vegetables, fruit, and chicken on a limited basis. Vegetables include root crops, tomatoes, lettuce, cabbage, cucumbers and beans. Plantains and coconuts are plentiful. Papayas, melons, mangos, and other local fruit can be found at the farmer's markets. Most of the oranges and grapefruit are juiced and are not readily available in the market. It is common for Cubans to eat canned fruits and vegetables when fresh are not available.

Cuba manufactures bottled water, soft drinks, juices (including fresh squeezed sugar cane), coffee, beer, rum, wine, and other specialty fruit-based liquors. Cuba also makes their own ice cream and yoghurt but not other dairy products. Local sea bass, swordfish, red snapper, shrimp and lobster are commonly found on the menu in tourist restaurants.

SECTION IV: BEST PRODUCT PROSPECTS

A. Products Present in the Market Which Have Good Sales Potential

No U.S. food service products are available in significant quantities. However, many U.S. brands of products manufactured in other countries are found in the Cuban food service sector.

B. Products Not Present in Significant Quantities but Which Have Good Sales Potential

All U.S. food service products should compete well with local, Canadian, European and Mexican products already available in the market. While restaurants typically prefer to make food from scratch, the inconsistent supply and quality of food make prepackaged appetizers, portion control cut meats, seasoned poultry, and frozen desserts attractive. On the other hand, restaurants will always need flour, beans, larger cuts of meat, whole birds, fresh and canned fruit and vegetables, sugar, whole eggs, and

basic dairy products. Please keep in mind that the smaller restaurants have limited chilled and frozen storage space and may buy their needs on a daily basis.

Cuba's best fruits and vegetables are exported for currency or squeezed into juices. Government run "Pescaderias Especiales" sell fish and other seafood. Fish has never been a major part of the Cuban cuisine and Cubans were requested to eat more fish when food shortages were severe. It is illegal to sell shrimp or lobster in Paladares. French wheat and French expertise is used in the bakery chain.

While chicken and pork are part of the traditional cuisine, steaks are usually found only in tourist restaurants. Beef, when used in the local cuisine, is used in snacks and rarely served as a main course. Rabbit is another favorite although rarely available locally.

C. Products Not Present Because They Face Significant Barriers

Until the U.S. and Cuban governments reach further agreements on opening up the market, sales of U.S. agricultural goods will be limited. In addition, Cuba's duties, less than 20 percent on most food products, should not greatly restrict sales of U.S. and other foreign food products.

SECTION IV: POST CONTACTS

A. For the Food and Agricultural Import Regulations Report, the Cuba Websites for Agricultural and Trade Information Reports and more U.S. Government Information on Cuba and other Caribbean Islands, please contact:

1. The Caribbean Basin Agricultural Trade Office
Foreign Agricultural Service
United States Department of Agriculture
909 SE 1st Avenue, Suite 720
Miami, FL 33131

Phone: (305) 536-5300
Fax: (305) 536-7577
Email: cbato@attglobal.net

Margie Bauer Director
Email: cbato@attglobal.net

Omar Gonzalez Deputy Director
Email: omarg01@attglobal.net

Graciela Juelle Administrative Assistant
Email: gjuelle@attglobal.net

2. Visit our website for promotional activities, trade statistics and more reports on the retail and food

service sectors and the food import regulations for Cuba and the Caribbean Islands:

<http://www.cbato.fas.usda.gov>

B. Other Sources of Information on Cuba:

1. Carlos Alamilla
Avatar Ltd. Corp.
1825 Ponce de Leon Blvd. #214
Coral Gables, FL 33134
Tel: 305-772-8584 and 305-220-5356
Fax: 305-220-7735
Email: avatal@bellsouth.net

2. Kirby Jones
ALAMAR Associates
2000 L Street NW, Suite 200
Washington, D.C. 20036
Tel: (202) 530-5234
Fax: (202) 530-5235
Email: Alacuba@aol.com
Website: <http://www.alamarcuba.com>

2. Buro de Informacion (Office of Information)
Camara de Comercio de la Republica de Cuba (Chamber of Commerce of the Republic of Cuba)
Calle 21 Esquina A, Vedado
Cuidad de la Habana, Cuba
Tel: 011 (537) 55-1321/22, 55-1324, 55-1931, 55-1452
Fax: 011 (537) 33-3042
Email: bic@camarcuba.com.cu
Website: <http://www.camaracuba.cu>

C. Private Sector Importers in Cuba

1. MF/CBC International
Fernando Navarretta
Calle 166 e/ Ira y 5ta No.111
alto Miramar La Habana, Cuba
Tel: 53-7 662192 or 662194
Fax: 53-7 662 193
email: fantinel@colombus.cu

U.S. Contact Information:
CBC International
1570 Newport Blvd.
Costa Mesa, CA 92627
Fax: 949-631-3550
email: cbcint@aol.com

2. Cedar Agencies, S.A.
Michel Auffray

Calle 3ra. No. 9607 e/ 96 y 96A
Playa, Ciudad de La Habana, Cuba
Tel: 53-7 24 3856/57/59
Fax: 53-7 24 3860
email: cedar_agencies@yahoo.com

D. Useful U.S. Government Websites

1. <http://www.fas.usda.gov/itp/cuba/cuba.html>

USDA's Foreign Agricultural website. This site contains the following information and links related to Cuba:

- a. Answers to frequently asked questions;
- b. General agricultural background;
- c. Commodity fact sheets;
- d. U.S. foreign policy, travel guidance and general background information;
- e. Export & trade guidance
- f. Trade data; and
- g. U.S. Legislation (Trade Sanctions Reform & Export Enhancement Act of 2000).

In addition, <http://www.fas.usda.gov/itp/sanctions.html> gives:

- a. Federal Register Notices for exports of agricultural commodities to Cuba;
- b. List of eligible agricultural commodities for the Trade Sanctions Reform and Export Enhancement Act of 2000; and
- c. A publication titled "Economic Impact of Sanctions on Cuba."

2. [Ftp://ftp.usitc.gov/pub/reports/studies/pub3398.pdf](ftp://ftp.usitc.gov/pub/reports/studies/pub3398.pdf)

U.S. International Trade Commission's 390 page report titled, "The Economic Impact of U.S. Sanctions with Respect to Cuba.

3. <http://www.bxa.doc.gov>

Bureau of Export Administration, Department of Commerce. Click on the options listed under "Trade Sanctions Reform and Export Enhancement Act implemented"

4. <http://www.treas.gov/ofac/ofactxt.html>

The Office of Foreign Assets Control of the U.S. Department of the Treasury administers and enforces economic and trade sanctions against targeted foreign countries, terrorism sponsoring organizations and international narcotics traffickers based on U.S. foreign policy and national security goals.

Another OFAC site provides the list of OFAC Authorized Travel Service Providers:

http://www.treas.gov/ofax/cuba_tsp.pdf

5. <http://www.odci.gov/cia/publications/factbook>

Basic Cuba information in the Central Intelligence Agency's World Factbook.

6. <http://www.state.gov/r/pa/bgn/index.cfm?docid=2886>

Background Note: Cuba (09/01), U.S. Department of State

E. Useful Non-U.S. Government Websites

1. <http://www.cubanag.ifas.ufl.edu/publications/agri.htm>

University of Florida's publications with objective and current information on the agricultural and fisheries sectors in Cuba and analysis of the potential implications of a resumption of trade and commercial relations between the United States and Cuba on these sectors in both countries. English.

2. <http://www.cubatrade.org>

Website of the U.S.-Cuba Trade and Economic Council, whose purpose is to provide an efficient and sustainable educational structure in which the U.S. business community may access accurate, consistent, and timely information and analysis on matters and issues of interest regarding United States-Republic of Cuba commercial, economic, and political relations. Ustec@aol.com English.

3. <http://www.camaracuba.cu>

Cuban Chamber of Commerce website. This site offers detailed information on Customs clearance legislation, requirements, procedures, and other useful information. English & Spanish.

4. [Http://www.ocpi.cu](http://www.ocpi.cu)

Cuba Office of Intellectual Property website. This site offers information on trademark/brand name registration including a list of legal firms offering registration services. Spanish only.

5. [Http://www.cubanwhitepages.com](http://www.cubanwhitepages.com)

On-line telephone directory for Cuba. English & Spanish.

6. <http://www.caribtourism.com>

Tourism figures from the Caribbean Tourism Organization.

