



JAMPRO
TRADE & INVESTMENT JAMAICA

MARKET POINTERS

Yellow Yam to Canada



JAMPRO
Business Analysis & Research
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Yellow Yam

A starchy root crop, the *Dioscorea alata* or, as more popularly known by its generic name- yam, has been a staple in the Jamaican diet for decades. This simple, yet delicious food item comes in a variety of flavours, textures and shapes. Dry, waxy, soft and even sweet, this diverse staple caters to every category of yam lover as well as the increasingly health conscious world populace.

In Jamaica, the yellow yam (*Dioscorea cayenensis*) is the predominant variety of yam that is cultivated and accounts for over 50% of yam production. There are two varieties of yellow yam grown in Jamaica. The “Black Whisp” is the more common of the two yellow yam varieties and has a softer texture. The “Round Leaf” is very hard and powdery when roasted or cooked and is preferred by most consumers. The small starch grains present in yams are responsible for the high digestibility, favouring the use of this food in the diet of children and the elderly.

The yellow yam provides the body with:

- Fibre, starch and sugar
- Potassium
- Protein
- Vitamins B1 (thiamin), B2 (riboflavin), B3 (niacin), B6 (pyridoxine), folic acid, and pantothenic acid.

The yellow yam has a range of health benefits and is associated with a lower risk of most degenerative

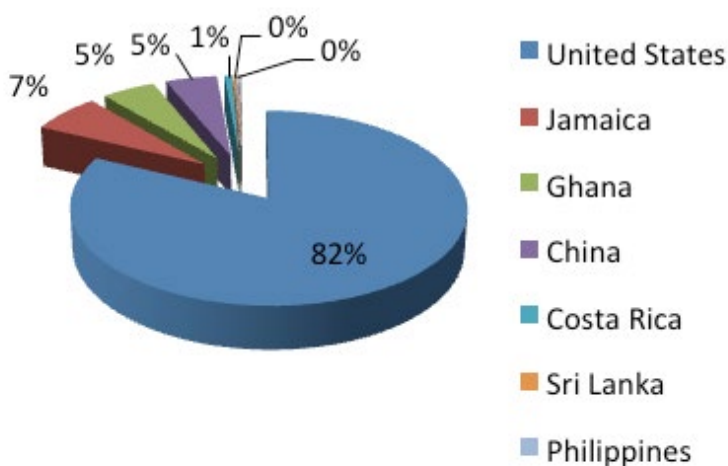
diseases. Storage at very low temperatures increases its shelf life.

The yellow yam is mostly consumed by boiling, roasting or frying but can also be used for drinks, casseroles, porridge and salads. The green parts of some plants can also be cooked and consumed as a vegetable. This diverse crop can also be processed into flour and oil to get the value added benefits.

Total national production Jamaica:	95,654 Metric Tonnes
Total national exports yams (fresh or naturally dried) :	\$21,961,000 USD
Average [unit] value:	[if data available]
HS Code:	[07.14.30]
National tariff line:	[07.14.90.50.10]
Tariff line in Canada:	[07.14.30.90.00]

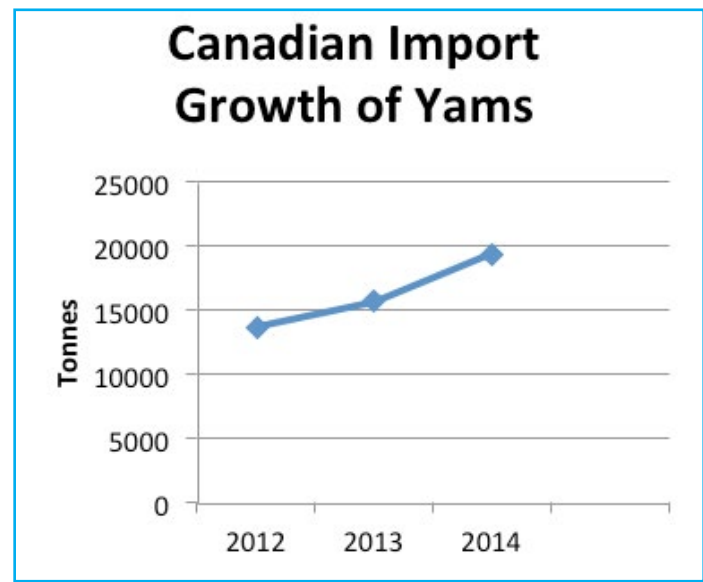
Target Market

Market Share of Yam Exporters to Canada



Canada has 16 import partners for yams, with the market dominated by its closest neighbour the US. Following the US is Jamaica, contributing 7% while China and Ghana are the other significant competitors in the market. As a NAFTA member, US exporters enjoy tariff free access into the Canadian market, while Jamaica also has tariff free access through the Caribbean-Canada trade agreement. Yams are still considered exotic goods and are found in small shops across the provinces.

Canada changed its customs classification for yams (disocorea) in 2012 to HS code 071430 in the revised system. As such data for this product is available from 2012 onwards. The growth of demand for yams has been growing at a rate of above 15% since 2012. The growth in demand in 2014, saw a 24% increase in the amount of yams imported relative to 2013, 19,476 tonnes to 15,761. The commitment by the Government of Canada in its Health Canada campaign has impacted the consumption of fruits and vegetables. Yams are considered exotic vegetables in Canada.



Total imports of yam (fresh chilled frozen or dried):	\$26,318,000 USD
Quantity:	19,476 kilograms
Average import value from all partners:	\$1.35/kilogram
Imports of yams from Jamaica	\$3,383,956 USD
Average import value:	\$2.20/kilogram

Market Access



The value of yam imports in 2013 grew 19% relative to 12; this was followed by a 39% increase in 2014 to achieve the \$26 million. The value of Jamaican imports into Canada declined in successive years by 2% over the 2012 to 2013 period and subsequently by 10% in 2013 to 2014.

Unit values from Jamaica fell by 13% in 2014 relative to 2013. As of 2014, Jamaican unit values were the 4th most expensive, behind Japan, the Philippines and India.

Jamaica and Canada are a part of the multilateral trading agreement known as CARIBCAN. In force since 1986, the agreement has been extended on two occasions; most recently until 2023 when talks broke down on a new agreement.

As a result of the agreement, all Jamaican goods - with the exception of footwear, textiles and clothing, leather garments, luggage and hand bags and lubricating oil - receive preferential access into the Canadian market.

General applied tariff:	9.5%
Tariff applied to Jamaica:	0%
Tariff applied to main competitors:	[latest data available]
China	9.5%
Ghana	9.5%
Other import duties to be paid:	Nil

Other regulatory requirements to comply with:

- Directive D-94-26 stipulates the phytosanitary import requirements for roots crops (other than potatoes) mushrooms, and vegetables with attachable roots for consumption or processing. Import permits are no longer needed for the importation of these crops.
- Crops with soil are prohibited under the requirements of Directive D-95-26. Crops without soil are free to import without an import certificate or phytosanitary certificate.

Certification: To qualify for the duty-free tariff treatment accorded to Commonwealth Caribbean countries, a good must be:

- a) “wholly obtained or produced” as defined in section 2(1) of the Commonwealth Caribbean Countries Tariff Rules of Origin Regulations (“Regulations”) or,
- b) as set out in section (2) of the Regulations, at least 60% of the ex-factory price of the goods as packed for shipment to Canada must originate in one or more beneficiary countries or Canada.

The 60% qualifying content may be cumulated from various beneficiary countries or Canada.

The goods must be finished in the beneficiary country in the form in which they were imported into Canada.

For all originating goods from commonwealth Caribbean beneficiary countries a Form A – Certificate of Origin (or an Exporter’s Statement of Origin must be submitted as proof of origin. The exporter in the beneficiary country in which the goods were finished must complete and sign the proof of origin as outlined in Section 4 of the Proof of Origin of Imported Goods Regulations found in Memorandum D11-4-2, Proof of Origin.

Market Access

Packaging requirements:

Efforts to pack produce carefully and as soon as possible after harvest will result in less waste and higher profits for producers. In general, packing cases must be labelled in English and French with the following information:

- product name and type;
- weight of case in pounds and kilograms and the number of items per container;
- grade (if applicable);
- size of box;
- country (and region if applicable) of origin;
- name and address of manufacturer or exporter;
- UPC/PLU or other bar code, identical to the one on the individual products;
- Lot number to identify individual shipments

Labelling requirements:

The requirements for the labelling of food are stipulated by the Canadian Food Inspection Agency. Fresh fruit and vegetables are exempt from Health Canada's regulations to standardize the presentation and content of nutrition information on food labels in the form of a 'Nutrition Facts Box'. Requirements for fruits and vegetables are:

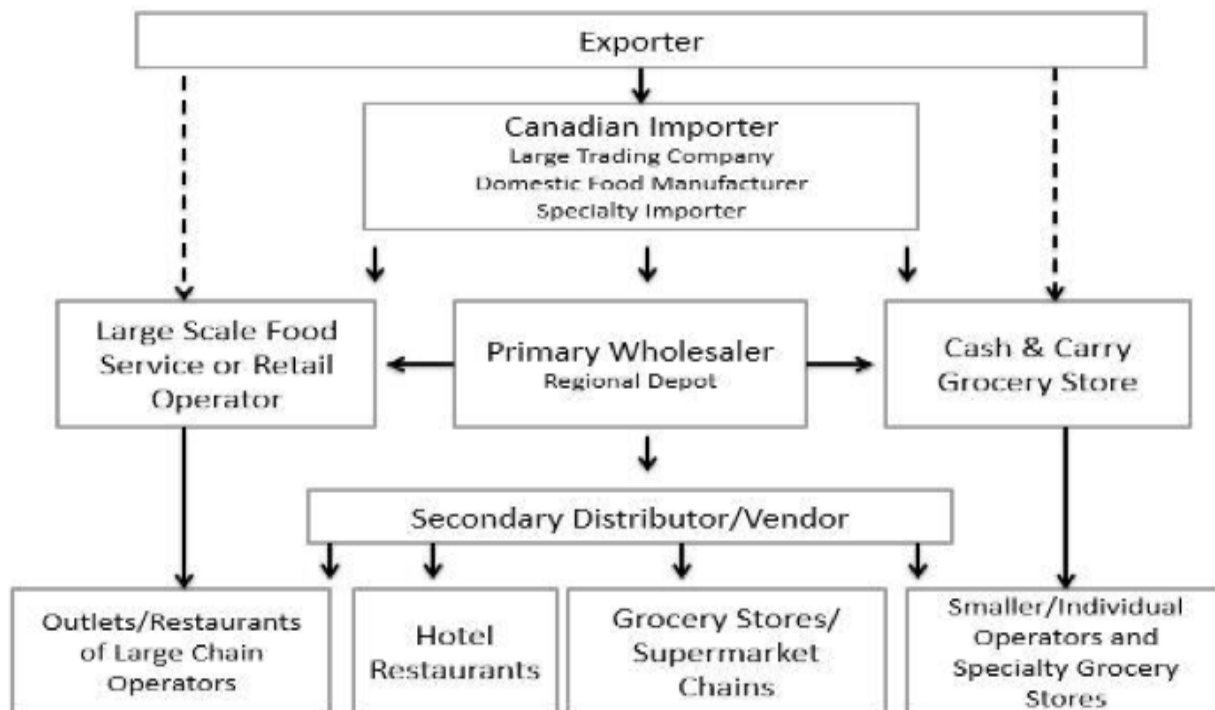
- Bilingual labelling
- Common name
- Country of origin
- Date markings and storage instructions
- Net quantity
-

<http://www.inspection.gc.ca/food/labelling/food-labelling-for-industry/fresh-fruits-and-vegetables/eng/1393800946775/1393801047506>

Distribution channels:

Distribution channels for produce in Canada can vary.

The chart below identifies the options available to exporters for accessing the Canadian market.



Market Access

The following are importers of yam registered with Industry Canada:

2013318 ONTARIO LIMITED

O/A Encompass Sales

Mark Chong, President

Email: Sales@Encompass-Sales.com

299 Basaltic Road Unit #2

Concord, Ontario

L4K 4W8

Tel: 905-303-2525

Fax: 905-303-1166

FRESH DIRECT PRODUCE LTD

Susan Leung, Senior Import and Export Manager

E: susan.leung@freshdirectproduce.com

888 Malkin Ave., Vancouver, BC

V6A 2K6

Tel: 604-255-1330

Corporate Fax: 604-255-1309

Buying/Sales Fax: 604-255-1304

Toll Free: 1-877-373-7466 (Fresh-66)

AFROCAN DIRECT IMPORT LTD.

Ebenezer Asare

President

Email: info@afrocanfoods.com

70 Devon Rd , Unit #6

Brampton, ON

L6T 5K7T:

Tel: (905) 458-5004

VEG PAK PRODUCE LTD.

Dan Carnevale

Email: info@vegpakproduce.com

165 The Queensway, Suite 249

Toronto, Ontario, Canada

M8Y 1H8

Tel: (416) 259 - 4686

Fax: (416) 259 - 1977



Market Access

Prices and pricing aspects in major distribution channels:

Canadian importers attempt to obtain exclusive importing rights for the specific items they agree to import. Traditionally, wholesalers' margins are about 30% of the retail price, while retailers usually operate on a 40% gross margin. Importers' margins are generally 10%. In the case of problem loads, a commission previously negotiated between the supplier and importer may be charged and can range anywhere between 12.5% and 18.5% of the selling price. The average landed price of yams in 2012/2013 was CAN\$1.23 per kilogram.

Voluntary standards:

Canada G.A.P.

In order to reassure buyers and maintain a high level of consumer confidence, the CanadaGAP certification program is designed to help implement and maintain effective food safety procedures within fresh produce operations. CanadaGAP has developed two manuals with the horticultural industry, one specific to Greenhouse operations and the second for other fruit and vegetable operations, which

have been reviewed for technical soundness by Canadian government officials. The manuals are designed for companies implementing Good Agricultural Practices (GAPs) in their production, packing and storage operations, and for re-packers and wholesalers implementing Good Manufacturing Practices (GMPs) and HACCP programs. See more at: <http://www.canadagap.ca/canadagap-program/overview/>

GLOBALG.A.P. Crops

GLOBALG.A.P. is a private sector body that sets voluntary standards for the certification of production processes of agricultural (including aquaculture) products around the globe. The GLOBALG.A.P. standard is primarily designed to reassure consumers about how food is produced on the farm by minimising detrimental environmental impacts of farming operations, reducing the use of chemical inputs and ensuring a responsible approach to worker health and safety as well as animal welfare.

See more at: <http://www.standardsmap.org/identify#st-hash.P296won9.dpuf>

Export development & export promotion:

Trade Promotion Events:

- Canadian Produce Management Convention and Trade Show – the largest fresh fruit and vegetables trade show in Canada. The next event is April 2016. See more at: <http://convention.cpma.ca/>
- SIAL – an agri-food event, hosting international exhibitors in food, wine and beverage. It is held every second April in Montreal. See more at <http://www.sialcanada.com/sial/en/>
- Grocery Showcase – an annual showcase of independent grocers and buyers. The last event was April 2015. See more at: <http://cfg.ca/>



Appendix A - Form A – Certificate of Origin

1. Goods consigned from (Exporter's business name, address, country)			Reference No.		
2. Goods consigned to (Consignee's name, address, country)			GENERALIZED SYSTEM OF PREFERENCES CERTIFICATE OF ORIGIN (Combined declaration and certificate) FORM A Issued in..... (country) See the instructions that follow.		
3. Means of transport and route (as far as known)			4. For official use		
5. Item number	6. Marks and numbers of packages	7. Number and kind of packages: description of goods	8. Origin criterion (See the instructions that follow.)	9. Gross weight or other quantity	10. Number and date of invoices
11. Certification It is hereby certified, on the basis of control carried out, that the declaration by the exporter is correct. Place and date, signature and stamp of certifying authority			12. Declaration by the exporter The undersigned hereby declares that the above details and statements are correct: that all the goods were produced in (country) And that they comply with the origin requirements specified for those goods in the Generalized System of Preferences for goods exported to (importing country) Place and date, signature of authorized signatory		

Appendix B - Exporter's Statement of Origin

I certify that the goods described in this invoice or in the attached invoice No. (*invoice No.*) were produced in the beneficiary country of (*country*) and that at least (*percentage*) % of the ex-factory price of the goods originates in the beneficiary country/countries of (*country/countries*).

Name and title

Corporation name and address

Telephone and fax numbers

Signature and date (day/month/year)



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