



Export Diversification of Jamaica

New Products and New Markets



The Commonwealth

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Export Diversification of Jamaica: New Products and New Markets
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Abbreviations and acronyms

BRCA	bilateral revealed comparative advantage
BRIC	Brazil, Russia, India, China
CARICOM	Caribbean Community
CIF	cost, insurance and freight
CS	cumulative share
CTB	contribution to trade balance
EU	European Union
FDI	foreign direct investment
FOB	free on board
GDP	gross domestic product
GI	geographical indicator
GOJ	Government of Jamaica
GVC	global value chain
HS	Harmonized System (code)
MNE	multinational enterprise
NES	National Export Strategy (of Jamaica)
nes	not elsewhere specified
POS	market position
PPP	purchasing power parity
R&D	research and development
RCA	revealed comparative advantage
SMEs	small and medium-sized enterprises
SPS	sanitary and phytosanitary measures
TBT	technical barriers to trade
UK	United Kingdom
USA	United States of America
WITS	World Integrated Trade Solutions
WRAP	Worldwide Responsible Accredited Production
WTO	World Trade Organization

Foreword

The diversification of Jamaica's export products and markets is key to creating the resilient, outward looking economy that we are working towards. Positioning Jamaica in this way – as a strong international economic presence on par with its global cultural impact – requires a strategic approach to identifying and taking advantage of new and emerging export opportunities. The Commonwealth Secretariat has provided a valuable resource for this effort with the **New Products, New Markets** study.

Developed as a complement to the National Export Strategy (2015–2019), this research paper seeks to identify new lines of products for which Jamaica has scope to augment its supply, and new markets where there is demand for Jamaica's exports.

The study uses a model that analyses the current import profile of countries to which Jamaica does not currently export, against 23 product profiles in the Agro-processing and Light Manufacturing sectors. The results are then compared with current exports to existing markets.

The findings from this study, validated by consultations with Jamaican exporters, are expected to serve as a platform to make informed decisions about penetrating current and new export markets, with new and existing products. The potential to claim new markets for these products is up to an additional USD\$90million per annum.

There is a vast sea of untapped potential beyond Jamaica's shores. As a country, we need to look beyond established markets and traditional products to capitalize on the potential to grow and expand our exports.

Thanks to the Commonwealth Secretariat and the exporters who validated this study, we now have a useful guide to breaking new ground in international markets. This provides us with an innovative, more diversified approach to growing Jamaica's exports.

Diane Edwards
President
Jamaica Promotions Corporation (JAMPRO)

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The views expressed in this publication are those of the authors and do not necessarily reflect the official position or policy of the Commonwealth Secretariat or any other agency or government identified.



Introduction

01

Situational analysis and export diversification

Jamaica's economic prospects are closely linked to its being able to turn around its export performance. With this in mind, we have prepared this report to identify new products and new markets for Jamaica's exports, with the aim to help the country leverage its full export potential. It highlights many new products where Jamaica has scope to expand its exports and new markets that can be explored to receive the larger volumes and variety of exports the country can produce.

Jamaica is a small Caribbean economy facing immense opportunities, but also challenges. For example:

- **The country is highly integrated with the world economy**, in terms

of both demand and supply, and experiences a large trade-to-gross domestic product (GDP) ratio – far more than 100 per cent. This makes the economy vulnerable to changes in external demand and the growing competitiveness of other countries. Additionally, it may be vulnerable simply to the greater number of regional and bilateral trade negotiations taking place in competing economies.

- **Constraints also come in terms of the capacity of products it is able to produce**, limiting opportunities to export and limited benefits offered by its few export destinations. Supply limitations have also caused Jamaica to **rely heavily on imports, resulting in large current account deficits** since 1995, exceeding 15 per cent (of GDP) in many years.

'The country needs to develop export competitiveness as well as capacity in more competitive product lines'

- The persistently high current account deficit has compounded the problem of **foreign debt**, which in recent years has hovered around 140 per cent of GDP. This in turn has caused an **overvaluation of domestic currency, encouraging imports, discouraging exports** and further perpetuating the current account deficit problem in a 'vicious circle'.

Being heavily dependent on trade and facing the challenge of a perpetually high current account deficit, it is crucial that Jamaica improve its export performance.

The country, which relies mainly on exports of mineral products like bauxite and aluminium ore, needs to develop export competitiveness as well as capacity in more sustainable product lines where it enjoys a comparative advantage in various global markets. It should, at the same time, look at identifying new markets for its exports based on cost competitiveness.

Structure of this report

Following on from this introduction, the report provides a brief overview of Jamaica's current trade, including trends, its major export and import products, along with its main export destinations and the countries where it sources most of its imports. It then identifies key areas for attention

in stimulating Jamaica's export performance. These include: country branding, information technology, accessing and growing global value chains, and improving quality management.

Given the key target audience of Jamaican exporters, the main body of this report comprises marketing plans for 23 priority products – presented in a user-friendly manner. The products (and recommended target markets) are identified as **new products and new markets** taking account of the experiences of successful exporters and following a rigorous analytical methodology, described in the annexes.

The report, with helpful maps, presents a brief overview of each of the new market that can be targeted. A marketing plan is then presented for each of the identified priority products. Each plan provides vital information on the top-five markets that exporters should look to target, along with market characteristics and export competitors. A list of recommended marketing initiatives for government and the private sector is also elaborated.

The methodology for the identification of the 23 priority products, based on Jamaica's export competitiveness and their identified markets, is outlined in Annex A and Annex B, respectively.

'Key areas where Jamaica can stimulate export performance include country branding, information technology, accessing and growing global value chains, and improving quality management'

The identified products for exports are:

- Frozen crustaceans
- Cheese
- Wheat/meslin flour
- Malt extract
- Sweet biscuits
- Bread, pastry, cakes, biscuits and other bakers' wares
- Juice of any single fruit/vegetable
- Sauces
- Food preparations
- Water
- Non-alcoholic beverages (excl. water)
- Beer made from malt

- Vermouth and other wine of fresh grapes
- Rum and tafia
- Preparations – animal feeding
- Limestone flux
- Cement clinkers
- Aluminium ores and concentrates
- Aluminium oxide
- Aluminium hydroxide
- Herbicides, anti-sprouting products and plant-growth regulators
- Waste and scrap of gold
- Waste and scrap of cast iron



Trends in Jamaica's Trade

02

So, what is the situation with Jamaica's trade as it currently stands today? Are trends towards growth or decline for imports and exports, what products are involved, and which countries are the main sources and destinations?

Jamaica is experiencing declining trade

The trend in Jamaica's total trade since the year 2000 shows two distinct patterns: it rose until 2008, before registering a decline in the aftermath of the global economic slowdown (see Figure 2.1). Total trade, which stood at US\$7.2 billion in 2014, increased by an average of around 12 per cent per year from 2000 to 2008 – but then went on to decline by around 4 per cent per annum during the period 2009–14. Imports, which constitute the major portion of total trade for Jamaica, showed similar patterns of movement.

As we discussed in the introduction, Jamaica's exports are highly vulnerable to the global demand situation. As a consequence, its exports declined by a higher rate – of 5.5 per cent – during second period, to settle at a mere US\$1.4 billion in 2014 (see Figure 2.1). Even more worryingly, Jamaica's exports have been lagging far behind its imports – which were valued at US\$5.8 billion in 2014. What is more, the gap between exports and imports has been widening over the years.

As a country under a heavy foreign-debt burden and facing developmental challenges, it is critical that Jamaica's

'While imports were valued at US\$5.8 billion in 2014, exports stood at a mere US\$1.4 billion'

Figure 2.1 Trends in Jamaica's trade (US\$ billion)



Source: World Integrated Trade Solutions (WITS; World Bank), available at: wits.worldbank.org/

'Jamaica could develop the potential to supply some of its current top imports, such as beverages, spirits and vinegar'

exports increase significantly in the coming years.

Lack of diversity

One of the main reasons for under-performance of Jamaica's exports is the low diversity of its export basket. Put simply, it exports too few distinct products.

This is evident from the fact that out of 99 HS two-digit products, just three of the country's top products – (i) inorganic chemicals; organic or inorganic compounds of precious metals, of rare-earth metals, of radioactive elements or of isotopes; (ii) mineral fuels, mineral oils and products of their distillation; bituminous substances; mineral waxes; and (iii) beverages, spirits and vinegar – made up 70 per cent of its total exports (averaged over 2014–16) (WITS [World Bank]). Jamaica's top-ten exports added up to 90 per cent of its exports in the same period.

Imports by the country, in comparison, appear to be much more diversified – with the top-ten imports constituting 67 per cent of total imports over the same period. However, at the upper end, Jamaica's top-four imports

alone – (i) mineral fuels, mineral oils and products of their distillation; bituminous substances; mineral waxes; (ii) nuclear reactors, boilers, machinery and mechanical appliances; parts thereof; (iii) vehicles other than railway or tramway rolling-stock, and parts and accessories thereof; and (iv) beverages, spirits and vinegar – made up more than half of Jamaica's imports.

We found there to be, therefore, a case for exploring the possibility of Jamaica developing the potential to itself supply some of its top imports. A few of these are already strong areas (like beverages, spirits and vinegar) for the country.

The country has few trading partners

Jamaica's export destinations and sources for imports are also concentrated in favour of just a few countries. For example, the top-three countries account for more than 60 per cent of its export and imports.

- **The United States of America (USA) is by far Jamaica's largest trading partner**, taking 45 per cent of its exports and providing 36 per cent of imports. At the same time,

Table 2.1 Top-ten exports and imports of Jamaica

EXPORT

Product code and description		Exports (US\$ millions)	CS (%)
28	Inorganic chemicals; organic or inorganic compounds of precious metals, of rare-earth metals, of radioactive elements or of isotopes	531	35
27	Mineral fuels, mineral oils and products of their distillation; bituminous substances; mineral waxes	350	58
22	Beverages, spirits and vinegar	177	70
26	Ores, slag and ash	130	79
17	Sugars and sugar confectionery	50	82
07	Edible vegetables certain roots tubers	28	84
20	Preparations of vegetables, fruit, nuts or other parts of plants	25	86
21	Miscellaneous edible preparations	24	87
09	Coffee, tea, malt and spices	23	89
99	Commodities not specified according to kind	20	90

IMPORT

Product code and description		Imports (US\$ millions)	CS (%)
27	Mineral fuels, mineral oils and products of their distillation; bituminous substances; mineral waxes	2,194	35
84	Nuclear reactors, boilers, machinery and mechanical appliances; parts thereof	350	41
87	Vehicles other than railway or tramway rolling-stock, and parts and accessories thereof	323	46
22	Beverages, spirits and vinegar	302	51
85	Electrical machinery equipment parts thereof; sound recorders reproducers, television image sound recorders reproducers, parts accessories of such articles	250	55
10	Cereals	183	58
39	Plastics and articles thereof	182	61
30	Pharmaceutical products	140	63
99	Commodities not specified according to kind	134	65
48	Paper and paperboard; articles of paper pulp, of paper or of paperboard	124	67

Source: WITS (World Bank), available at: wits.worldbank.org/

Note: (i) Figures pertain to two-digit HS Code (2007) and are averaged over the years 2012, 2013 and 2014; (ii) CS = cumulative share

'Jamaica should try to narrow its current account deficit with major exporter countries. There is considerable scope for trade negotiations in this respect'

however, the US is also the major contributor to Jamaica's current account deficit: its average annual exports to the US (at US\$686 million) lag far behind imports from the country (US\$2,253 million).

Canada is Jamaica's second largest export destination (US\$686 million), even though it just ninth as a source country for Jamaica's imports.

- In addition, **Jamaica's exports to destinations other than the US and Canada are relatively low in magnitude.** This indicates scope

for expansion. Except for USA and Canada, no other of Jamaica's top-ten export destinations is mentioned in the top-ten countries from which it imports. This indicates scope for bilateral trade negotiations. Even in the cases of the US and Canada, **there appears to be considerable scope for negotiations to augment exports.**

If it is to reduce its trade deficit, Jamaica should try to narrow its current account deficit with some of these countries that are its major exporters.

Table 2.2 Jamaica's top-ten export destinations and import sources

EXPORT

Partner name	Exports (US\$ millions)	Share (%)	CS (%)
US	686	45	45
Canada	188	12	58
Netherlands	85	6	63
United Kingdom	66	4	68
Slovenia	62	4	72
Russian Federation	53	3	75
Iceland	43	3	78
Georgia	30	2	80
UAE	27	2	82
France	25	2	84

IMPORT

Partner name	Imports (US\$ millions)	Share (%)	CS (%)
US	2,253	36	36
Venezuela	871	14	50
Trinidad and Tobago	687	11	61
China	346	6	67
Mexico	243	4	71
Japan	182	3	74
Brazil	155	2	76
Unspecified	114	2	78
Canada	103	2	80
Germany	75	1	81

Source: WITS WITS (World Bank), available at: wits.worldbank.org/

Note: (i) CS= cumulative share



Key Actions and Strategies to Grow Jamaica's Exports

03

The next step then is to explore how Jamaica can develop and improve its export performance – by diversifying its export products, expanding supply and moving into new markets. What mechanisms might exporters – and potential exporters – use to achieve these goals.

In Jamaica's National Export Strategy (NES) 2015–2019, several key success factors are identified for the effective implementation of the strategic initiatives of the NES. Many of these success factors have implications for the stimulus schemes being put forward in this report.

The key areas we would like to highlight in this respect are: country branding, information technology, accessing and growing global value chains and improving quality management.

These mechanisms are elaborated below in the context of building an export stimulus regime for Jamaica.

'Jamaica is considered the strongest brand in the Caribbean region. This strength needs to be further developed'

For Jamaica, country branding is key

One of the most important and 'fair' means of supporting Jamaican manufacturers of all sizes and sectors is to build 'Brand Jamaica'. The Italians, Americans and Germans do this all the time with great impact.

The Jamaican brand has significant 'muscle' and is easily recognised internationally. Icons such as Bob Marley and reggae music, Usain Bolt and known local brands such as Sandals and Grace Kennedy add to the country's brand muscle.

In 2014, Jamaica was considered the strongest brand in the Caribbean region. According to *FutureBrand's Country Brand Index 2014–2015*,¹ of 118 countries listed, Jamaica ranked 51st with a 65 per cent international recognition and awareness rate. Jamaica was ahead of countries such as Turkey (53rd), Mexico, (55th), Columbia (68th) and Nigeria (75th), although it lagged behind countries such as Brazil (43rd), India (50th), Costa Rica (37th) and Puerto Rico (33rd). No other Caribbean Community (CARICOM) country made it into the top-75 list. Japan, Switzerland, Germany, Sweden and Canada were the top five. The USA was ranked as number seven.

Country brand index

The country brand index is based on the following criteria:

- the 'Made In' strength;
- the country's value system;
- quality of life;
- business potential;
- heritage and culture;
- tourism; and
- the overall perception and awareness of the brand.

'Branding adds tremendous value – but remains largely untapped in Jamaica as there is no consistency in branding of Jamaican products'

Jamaica's scoring highest in the CARICOM is a strength that needs to be further developed.

It is therefore crucial for exporters to exploit and benefit from the power of the Jamaica brand. Exporters need to consider that market access and penetration are essential; branding will add the 'muscle' to assist in making this a reality. The 'Brand Jamaica' strategy is an indispensable tool for transforming the way the country benefits from global awareness of authentic Jamaican goods and services.

The development and promotion of authentic Jamaican culture through a strong country brand is noted in Vision 2030 Jamaica.² The country's National Export Strategy also seeks to further support this important initiative.

'Made in Jamaica', the Jamaican 'mark' and the Jamaican geographical indicator (GI) are all aspects of branding that add tremendous value to the already excellent products that are generated in the sector. However, this area remains largely untapped, as there is no consistency in branding Jamaican products across the board.

Once established, protection of the Jamaican brand will be of critical importance for exports. The law protecting GIs says that only products or raw materials originating from a particular area, and/or meeting certain standards, are allowed to benefit from this special designation. While there is an array of laws and regulations in this regard, **enforcement will be crucial to truly take advantage of Jamaica's brand for effective competitiveness in global markets.**

Another factor for exporters to consider is that since natural compounds cannot be patented, companies are finding it difficult to create intellectual property from their research. This is where branding and positioning of the Jamaica brand will be critical for export success.

Jamaica can learn from other countries

Other countries have implemented country-branding strategies for

specific sectors and priority products. Consider what the USA is doing to promote its cotton industry, what Italy is doing to promote leather and leather shoes, or German branding to promote the country's cars and precision engineering.

The USA has launched a campaign and has already branded its US-made cotton in its 'Cotton USA' campaign, featured below.

USA 'fair' promotion of the cotton industry



Italy is also using the strength of its country brand to promote the leather goods sector and Italian shoes.

Italian 'fair' leather promotion



'Made in Germany' is increasingly used to promote many industries and German-made products.

Germany promotion – 'Made in Germany'



'Jamaica, with its state-of-the-art technological platforms and a strong telecommunications sector, has a great opportunity to ride the IT wave'

'With a penetration rate of just 54 per cent of the population, Jamaica still has a long way to go in improving internet reach'

Jamaica needs to 'ride' the fourth – IT – economic wave

The second key factor for success is information technology (IT) infrastructure. The world economy is in the middle of a fourth economic wave – the IT wave. It is important that Jamaica's labour-intensive and knowledge-driven sectors see themselves as leaders in this fourth wave.

The first three 'long waves' of development (1. early mechanisation; 2. steam power and rail; and 3. electrical and heavy mechanisation) bypassed much of the developing world. Jamaica, with its state-of-the-art technological platforms, e.g. fibre optic cables, and a strong telecommunications sector, has the opportunity to 'ride' this fourth wave. This is a great opportunity, one where services will play a key role as they are highly IT dependent.

Technology is a key driver of growth of all sectors. Technology facilitates innovation and supports productivity, which are both critical for competitiveness in priority sectors, particularly services.

According to the *McKinsey Global Institute*,³ since the beginning of the

1990s, productivity growth in European countries has decreased whereas it has increased in the US. One important reason for this development is that the US has been better at reaping the benefits of using information technology (IT) to increase productivity when compared to Europe. The contribution of information and communications technology (ICT) capital per hour worked to productivity is 0.8 percentage points in the US, compared to 0.5 in the EU.

Using IT as a key distribution and communication tool⁴

Technology has also been a significant facilitator of trade in services across borders. With the dawn of the internet and telecommunications in general, businesses are now able to use IT as a key distribution and communication tool for the marketing, sale, delivery and eventual consumption of commercial services. The introduction of new technologies such as cloud computing, Big Data⁵ analytics and mobile technology, to name a few, are creating significant opportunities for the services sectors.

Jamaica currently has approximately 1.5 million of its residents with access to some sort of connection to the internet, according to *Internet WorldStats*.⁶ This represents a penetration rate of 54 per cent of the population. This compares with 77 per cent in Barbados and 64 per cent in Trinidad and Tobago. Compared to countries like Singapore, with 88 per cent penetration, Jamaica still has some way to go in terms of improving internet reach to its citizens.

Strengthening value chains is crucial for export growth

A third crucial mechanism that Jamaica's exporters can use to their advantage is the growth in global value chains.

The international fragmentation of production into global value chains (GVCs) challenges the way we look at the global economy. If Jamaica's manufacturers and service suppliers are to develop and expand exports, it is essential that they understand how GVCs work, how they affect economic and export performance, and what policies and stimulus schemes help exporters derive greater benefits from these value chains.

International fragmentation of production poses challenges

The fragmentation of production in GVCs is driven largely by:

- rapid and radical transformation of consumer markets;
- widespread changes to and distribution of technology;
- volatile costs;
- limited access to resources and markets; and
- trade reforms stemming from WTO mandates and agreements.
- access to quotas;
- preferential trade agreements;
- specific policies regarding foreign direct investments and trade;
- formation of clusters; and
- complementary efforts to improve trade infrastructure and provide a trade- and investment-facilitating environment.⁸

This shows that Jamaica cannot continue to take the same approach to value chain linkages.

The changing realities of the global economy, with shrinking Northern markets and growing network trade, have further increased the complexities of the trade-development debate, posing new policy challenges.

Fragmentation of production across countries and continents, and the linking of tasks through global value chains, has also somewhere delinked exports from value addition. Many developing countries that are linked in global value chains are finding themselves trapped at the bottom of the chain, 'locked-in' and unable to add

value to their exports. Commodity exporters are particularly trapped in such situations. This means middle-income countries are finding their trade figures rising, but with little corresponding rise in their domestic value-added growth.⁷

Gainfully linking to GVCs

Nonetheless, some countries in some sectors have been able to gain from the changing patterns of trade, gainfully linking into the global value chains, with rising exports, production, employment and growth. Many external as well as internal factors have led to these gainful linkages. These include:

We can ask then, why is it important to capture, and benefit from, the opportunities for linking to GVCs? Exporters need to consider first that with the growth of GVCs, economies are becoming more interconnected, and they are increasingly specialised in specific activities and stages of value chains, rather than in industries. Trade in GVCs, therefore, involves extensive flows of intermediate goods and services.

Exporters should consider also that GVCs are a powerful driver of growth and productivity, and that they support job creation. It is also key for them to note that imports are essential for exports, especially in complex value chains.

'Exporters should consider that global value chains are a powerful driver of growth and productivity, and that they support job creation'

'Convergence of standards and certification requirements can help alleviate burdens on exporting firms'

Trade protection versus trade facilitation

In GVCs, tariffs and non-tariff barriers are effectively a tax on exports. Export restrictions can also affect the efficient functioning of GVCs and raise costs.

The negative effects of trade protection are compounded in GVCs when inputs and raw materials cross borders many times. However, trade-facilitating measures, such as fast and efficient port and customs procedures, permit the smooth operation of value chains that require goods to cross borders many times. Convergence of standards and certification requirements, along with mutual recognition agreements, can help alleviate burdens on exporting firms.

While abolishing tariffs is a starting point for creating new trade opportunities, the value chain also requires efficient services and the possibility to move people, capital and technology across borders. Also, given the important role of multinational

enterprises (MNEs) in GVCs, lowering investment barriers is an efficient way for a country to become integrated into GVCs. By inhibiting the efficient functioning of GVCs, impediments to cross-border investment can have negative welfare impacts beyond the home and host country.

GVCs provide an opportunity for Jamaica

Integration into GVCs provides an excellent opportunity for Jamaica to move towards further economic development – through access to networks, global markets, capital, knowledge and technology. GVC integration is often easier than building a complete value chain.

Jamaica can enter GVCs through appropriate stimulus schemes and a general open stance towards trade and foreign direct investment (FDI), improving its business environment and strengthening domestic capabilities to engage in international trade.

Government support

In order to strengthen the benefits that Jamaica stands to obtain from participating in GVCs, the Government of Jamaica (GoJ) needs to support the stimulus regime.

This support will:

- assist in strengthening the business environment;
- improve investment in knowledge assets such as research and development (R&D), design and innovation;
- foster the development and adoption of new technology;
- increase efficiency in procedures and processes;
- strengthen infrastructure;
- support branding, marketing and promotion of Jamaican enterprises and products;
- encourage the adoption of key standards such as fair trade and organic practices in agriculture; and
- develop capacity in important economic competencies, notably skills and management.

The role of small and medium-sized enterprises (SMEs) should not be ignored in GVCs. SMEs play an important role in niche areas of GVCs and contribute indirectly to the exports of larger firms.

The Government of Jamaica can support the participation of SMEs in GVCs by encouraging the development of linkages with international firms, fostering their supply capacity and ability to innovate, and facilitating the adoption of product standards and certification.

Table 3.1, developed by the Commonwealth Secretariat, presents Jamaica's GVCs through forward linkages for ten selected priority products.

Improving quality management and standards

Finally, in our discussion of mechanisms to stimulate exports, quality products and services are more likely to be successful for market access and improving competitiveness.

However, meeting technical requirements is a challenge for many exporters, especially in view of the multiplying of standards. Countries are imposing a growing number of standards to protect the health and safety of their citizens and to meet demands of buyers for their specific needs. This area, therefore, presents an opportunity for intervention on the part of the government and its implementing agencies in order to support exporters and stimulate trade.

TBT and SPS Agreements

The primary purpose of the World Trade Organization (WTO) Technical Barriers to Trade (TBT) and Sanitary and Phytosanitary (SPS) Agreements is to minimise the negative impact

on trade of technical regulations and SPS measures as barriers to trade, by allowing legitimate restrictions while preventing the imposition of arbitrary or unjustified ones.

Where the technical regulations and SPS measures of an importing country conform with the TBT and SPS Agreements, exporters seeking to access that market have no choice but to comply with the requirements. Trade may not be possible where, for example, it is beyond the capacity of the industry in a developing country to supply goods that meet the high technical requirements of an importing country at a competitive price.

Similarly, an SPS requirement imposed by an importing country to protect its biosecurity, such as one prohibiting imports of animal products from countries that are known to have certain serious animal diseases, may also prevent trade with these countries.

Adapting to comply with standards and technical requirements

Enterprises intending to export their products need up-to-date information about the technical requirements that apply, both voluntary and mandatory, in their target markets. For certain sectors, such as agri-processing and agribusiness, it is difficult to detail all the specific standards owing to the wide range of products in the sector and the varied requirements for each. These are subject to sanitary and phytosanitary controls and technical regulations and standards that vary from country to country and sector to sector.

After obtaining information on standards and other technical requirements, exporters must adapt

'Technical requirements and standards is an area where governments and its agencies can intervene to support exporters and stimulate trade'

'Enterprises that wish to export their products need up-to-date information about technical requirements that apply in their target markets'

Table 3.1 Jamaica's GVCs through forward linkages for ten selected priority products

Sr. No.	Product code	Product description	Potential new markets	Import value (US\$1000s)	Jamaica's competitive advantage	Potential market size (US\$1000s)	Jamaica's exports to world
1	110100	Wheat/meslin flour	Netherlands, Brazil, Indonesia, France, United States	823.857	United Kingdom, Italy (Netherlands) Italy (France) Korea, Rep. (US)	14,218	5,012
2	230990	Preparations of a kind used in animal feeding other than dog/cat food put up for RS	Germany, Netherlands, Belgium, Russian Federation, United States	3,421.113	Belgium, France, Denmark, United Kingdom (Germany) United States, United Kingdom, Bulgaria (Netherlands) Italy, United States, China (Belgium) Netherlands, France, Belgium, Norway, Denmark (Russian Fed.) Canada, China, Ireland, Malaysia, France (US)	1,051,014	10,382
3	252100	Limestone flux: limestone and other calcareous stone, of a kind used for the manufacture of lime/cement	India, Japan, Korea, Rep., Germany, Netherlands	402,554	Malaysia, Thailand, Australia (India) Vietnam, Malaysia, United States, Korea, Rep., China (Japan) India, Spain (Korea Rep.) Sweden, Spain (Germany) Belgium, France, India, United States, United Kingdom (Netherlands)	100,173	2,302
4	252310	Cement clinkers	Ghana, Sri Lanka, Malaysia, Brazil, Saudi Arabia	826,059	South Africa (Ghana)	31,884	9,630
5	260600	Aluminium ores and concentrates	China, Ireland, Spain, Ukraine, Germany	3,331,129	Brazil, United Kingdom, Greece, United States, China (Ireland) China, Turkey, Greece, Netherlands, Belgium (Spain) Australia (Ukraine) China, Canada, Iceland, Ghana, Brazil (Germany)	155,142	130,350
6	281820	Aluminium oxide (excl. artificial corundum)	Norway, Iceland, South Africa, India, Qatar	2,445,200	Japan (Norway) Australia, China, United States, France, India (South Africa) China, Netherlands, United States, France (India)	541,914	522,736

(continued)

7	281830	Aluminium hydroxide	Japan, Korea, Rep., Netherlands, Italy, Germany	552,257	United States (Japan) China, United States (Korea Rep.) Spain, Ireland, Belgium, Australia, United States (Netherlands) Hungary, Netherlands (Italy) Netherlands, Hungary (Germany)	188,582	6,832
8	380893	Herbicides, anti-sprouting products and plant-growth regulators, put up in forms/ packing for retail sale/as preparations/articles	France, Canada, Germany, Brazil, Australia	3,462,533	Italy (France) United Kingdom (Canada) United Kingdom (Germany) South Africa (Brazil) New Zealand (Australia)	326,831	2,055
9	711291	Waste and scrap of gold, incl. metal clad with gold but excl. sweepings containing other precious metals	Germany, Hong Kong, China, Canada, Spain, Switzerland	4,259,200	Switzerland, France, United States, Sweden, Denmark (Germany) Japan, South Africa, China, Singapore, Thailand (Hong Kong, China) United States, United Kingdom, Mexico, Peru (Canada) France, United Kingdom, Netherlands, Portugal, Italy (Spain) Italy, Spain, France, Hong Kong, China (Switzerland)	3,540,654	13,195
10	720410	Waste and scrap of cast iron	Netherlands, Thailand, Malaysia, Germany, Spain	641,035	France, Belgium, Italy, United Kingdom, Spain (Netherlands) United States, Australia, New Zealand (Thailand)	149,497	10,180

Note: i) Jamaica's **weak competitors** in potential new markets are shown under Jamaica's competitive advantage; ii) The respective **potential market** of Jamaica's competitors is shown in brackets; iii) In a few markets, there are no weak competitors; iv) Weak competitors are arranged in descending order of their exports in potential markets.

their products and processes to satisfy export market requirements and demonstrate compliance with them. They may not have full and readily available access to recognised certification service providers for this purpose, as quality infrastructure in Jamaica has yet to reach its full potential. Exporters may have to use foreign certification bodies that are recognised in the export market, thereby increasing their costs. In this regard, the **government and its agencies can provide stimulus initiatives in the form of information, training and/or the offsetting of some certification costs to qualified exporters as a exporting-supporting measure.**

In addition, certification brings a further level of competitiveness and weight, enhancing the brand and quality image of the product in question.

Exporters should consider the weight that organic and fair trade certification have in certain niche markets. Or the backing the WRAP [Worldwide Responsible Accredited Production] programme carries.

Notes

1 See: <http://www.mumbrella.asia/content/uploads/2014/11/>

CountryBrandIndex2014.pdf (accessed 6 June 2017).

2 See: <http://www.vision2030.gov.jm> (accessed 7 June 2017).

3 See: <http://www.mckinsey.com/mgi/our-research/productivity-competitiveness-and-growth> (accessed 7 June 2017).

4 See: <http://www.mckinsey.com/mgi/our-research/productivity-competitiveness-and-growth> (accessed 7 June 2017).

5 Extremely large data sets that may be analysed computationally to reveal patterns, trends and associations, especially relating to human behaviour and interactions.

6 See: <http://www.internetworldstats.com/stats.htm> (accessed 6 June 2017).

7 Banga, R (2014), 'Linking into Global Value Chains is not Sufficient: Do You Export Domestic Value Added Contents'. *Journal of Economic Integration*, vol. 29(2), 267–97.

8 Ibid.



Marketing Plans

04

Canada

Given its abundant natural resources, highly skilled labour force, and modern capital plant, Canada enjoyed solid economic growth from 1993 through 2007. Buffeted by the global economic crisis, the economy dropped into a sharp recession in the final months of 2008, and Ottawa posted its first fiscal deficit in 2009 after 12 years of surplus. Canada's major banks, however, emerged from the financial crisis of 2008–09 among the strongest in the world, owing to the early intervention by the Bank of Canada and the financial sector's tradition of conservative lending practices and strong capitalisation. Canada achieved marginal growth in 2010–15, despite the recent drop in oil prices.

Ireland

Ireland is a small, modern, trade-dependent economy. Ireland was among the initial group of 12 EU nations that began circulating the euro on 1 January 2002. GDP growth averaged 6% in 1995–2007, but economic activity dropped sharply during the world financial crisis and the subsequent collapse of its domestic property market and construction industry. Faced with sharply reduced revenues and a burgeoning budget deficit from efforts to stabilise its fragile banking sector, the Irish government introduced the first in a series of draconian budgets in 2009. At US\$250 billion in 2015, Ireland ranks 61st in the global economy in terms of GDP (PPP), but is 22nd in terms of GDP per capita (which was US\$54,300 in 2015). This bodes well for doing business in Ireland.

Iceland

Iceland's Scandinavian-type social-market economy combines a capitalist structure and free-market principles with an extensive welfare system. Except for a brief period during the 2008 crisis, Iceland has achieved high growth, low unemployment and a remarkably even distribution of income. GDP fell 6.8% in 2009, and unemployment peaked at 9.4% in February 2009. In 2015, Iceland experienced growth of 3.7% and GDP per capita of US\$46,600, making it the 30th ranked country in this regard.

Belgium

This modern, open and private enterprise-based economy has capitalised on its central geographic location, highly developed transport network, and diversified industrial and commercial base. In 2015, Belgian GDP grew by 1.3%, the unemployment rate stabilised at 8.6%, and the budget deficit was 2.7% of GDP. The country's GDP per capita stood at US\$44,100 in 2015, ranking it 34th in the world.

France

The French economy is diversified across all sectors. With more than 84 million foreign tourists per year, France is the most visited country in the world and maintains the third largest income in the world from tourism. France's real GDP increased by 1.2% in 2015. The unemployment rate (including overseas territories) increased from 7.8% in 2008 to 10.4% in the fourth quarter of 2014. In 2015, France's GDP per capita was US\$41,400, making it the 38th largest world economy on this basis.

Germany

Germany is the fifth largest economy in the world in PPP terms and Europe's largest. Germany's GDP was US\$3.8 trillion in PPP terms in 2015. Real growth of 1.5% was achieved in 2015 and Germany enjoys a per capita GDP of US\$47,400 (29th in the world). Inflation in Germany stood at 0.2% and its unemployment rate was 4.8% in 2015.

Italy

Italy is the third-largest economy in the Eurozone. Italy has a diversified economy, which is divided into a developed industrial north, dominated by private companies, and a less-developed, highly subsidised, agricultural south, where unemployment is higher. The Italian economy is driven in large part by the manufacture of high-quality consumer goods produced by small and medium-sized enterprises, many of them family-owned. Italy also has a sizable underground economy, which by some estimates accounts for as much as 17% of GDP. These activities are most common within the agriculture, construction and service sectors.

Ghana

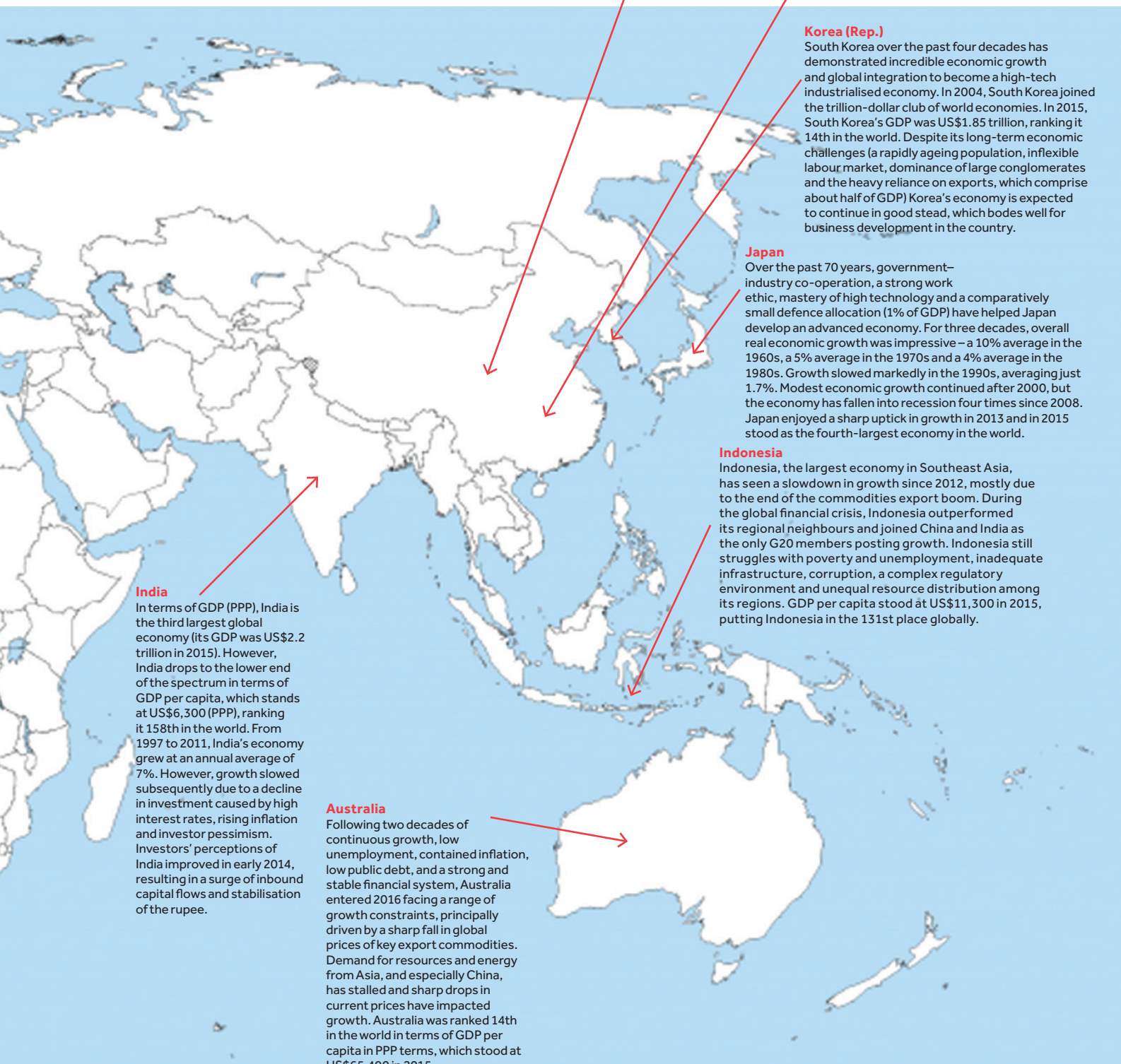
At US\$113.3 billion in GDP (PPP), Ghana is one of the larger economies of the African continent, ranking 81st globally and trailing closely behind counterparts such as Kenya (75th) and Ethiopia (73rd). It is also ahead of Uganda (90th), but far behind Nigeria (23rd). Ghana's GDP per capita, US\$4,300, is globally in 175th position, very low by international standards. The unemployment rate (2015 estimates) is 5.5%, with nearly a quarter of the population living below the poverty line.

United States

The US has the most technologically powerful economy in the world, with a per capita GDP of \$54,800. Based on a comparison of GDP measured at PPP conversion rates, the US economy in 2014, having stood as the largest in the world for more than a century, slipped into second place behind China. In the US, private individuals and businesses make most of the decisions, with federal and state governments buying needed goods and services predominantly in the private marketplace. In 2014, the unemployment rate dropped to 6.2% and continued to fall to stand at 5.5% by mid-2015. Inflation stood at 1.7% in the same year and public debt as a share of GDP continued to decline, following several years of increase.

Brazil

Characterised by large and well-developed agricultural, mining, manufacturing and service sectors, and a rapidly expanding middle class, Brazil's economy outperforms those of all other South American countries. Brazil is expanding its presence in world markets. Brazil's reputation as a BRIC [Brazil, Russia, India, China] country has been waning recently. It grew by 2.2% a year, on average, during 2011 to 2014, a slower rate of growth than in most of its neighbours, let alone in BRIC rivals such as China and India.



China

Since the late 1970s, China has moved from a closed, centrally planned system to a more market-oriented one that plays a major global role – in 2010 China became the world's largest exporter. Measured on a PPP basis that adjusts for price differences, in 2015 China was the largest economy in the world, surpassing the US in 2014 for the first time in modern history. Still, China's per capita income of US\$14,300 is below the world average. China ranks 112th in the world in terms of per capita income. China's unemployment rate is moderately low at 4% in 2015.

China (Hong Kong)

Hong Kong has a free market economy, highly dependent on international trade and finance – the value of goods and services trade, including a sizable share of re-exports. Hong Kong's open economy left it exposed to the global economic slowdown that began in 2008. Although increasing integration with China, through trade, tourism and financial links, helped it to make an initial recovery more quickly than many observers anticipated, its continued reliance on foreign trade and investment leaves it vulnerable to renewed global financial market volatility or a slowdown in the global economy. The mainland has long been Hong Kong's largest trading partner, accounting for about half of Hong Kong's total trade by value.

Korea (Rep.)

South Korea over the past four decades has demonstrated incredible economic growth and global integration to become a high-tech industrialised economy. In 2004, South Korea joined the trillion-dollar club of world economies. In 2015, South Korea's GDP was US\$1.85 trillion, ranking it 14th in the world. Despite its long-term economic challenges (a rapidly ageing population, inflexible labour market, dominance of large conglomerates and the heavy reliance on exports, which comprise about half of GDP) Korea's economy is expected to continue in good stead, which bodes well for business development in the country.

Japan

Over the past 70 years, government-industry co-operation, a strong work ethic, mastery of high technology and a comparatively small defence allocation (1% of GDP) have helped Japan develop an advanced economy. For three decades, overall real economic growth was impressive – a 10% average in the 1960s, a 5% average in the 1970s and a 4% average in the 1980s. Growth slowed markedly in the 1990s, averaging just 1.7%. Modest economic growth continued after 2000, but the economy has fallen into recession four times since 2008. Japan enjoyed a sharp uptick in growth in 2013 and in 2015 stood as the fourth-largest economy in the world.

Indonesia

Indonesia, the largest economy in Southeast Asia, has seen a slowdown in growth since 2012, mostly due to the end of the commodities export boom. During the global financial crisis, Indonesia outperformed its regional neighbours and joined China and India as the only G20 members posting growth. Indonesia still struggles with poverty and unemployment, inadequate infrastructure, corruption, a complex regulatory environment and unequal resource distribution among its regions. GDP per capita stood at US\$11,300 in 2015, putting Indonesia in the 131st place globally.

India

In terms of GDP (PPP), India is the third largest global economy (its GDP was US\$2.2 trillion in 2015). However, India drops to the lower end of the spectrum in terms of GDP per capita, which stands at US\$6,300 (PPP), ranking it 158th in the world. From 1997 to 2011, India's economy grew at an annual average of 7%. However, growth slowed subsequently due to a decline in investment caused by high interest rates, rising inflation and investor pessimism. Investors' perceptions of India improved in early 2014, resulting in a surge of inbound capital flows and stabilisation of the rupee.

Australia

Following two decades of continuous growth, low unemployment, contained inflation, low public debt, and a strong and stable financial system, Australia entered 2016 facing a range of growth constraints, principally driven by a sharp fall in global prices of key export commodities. Demand for resources and energy from Asia, and especially China, has stalled and sharp drops in current prices have impacted growth. Australia was ranked 14th in the world in terms of GDP per capita in PPP terms, which stood at US\$65,400 in 2015.

United Kingdom

The UK, a leading trading power and financial centre, is the third-largest economy in Europe after Germany and France. In 2008, the global financial crisis hit the economy particularly hard, due to the importance of its financial sector. Falling house prices, high consumer debt and the global economic slowdown compounded Britain's economic problems, pushing the economy into recession in the latter half of 2008. In 2012, weak consumer spending and subdued business investment weighed on the economy. However, in 2013 GDP grew 1.7% and in 2014, 2.8%, accelerating because of greater consumer spending and a recovering housing market.

The Netherlands

The Netherlands, the sixth-largest economy in the European Union, plays an important role as a European transportation hub, with a persistently high trade surplus, stable industrial relations and moderate unemployment. Industry focuses on food processing, chemicals, petroleum refining and electrical machinery. The year 2014 saw fragile GDP growth of 1% and a rise in most economic indicators. Growth picked up in 2015, as households boosted purchases through reduced saving. Drivers of growth included increased exports and business investments, as well as newly invigorated household consumption.

Norway

The Norwegian economy is a stable economy richly endowed with natural resources, including oil and gas, hydropower, fish, forests and minerals. Norway is one of the world's leading petroleum exporters (39% of its exports is petroleum). Norway saves state revenue from petroleum sector activities in the world's largest sovereign reserve, valued at more than US\$800 billion as of early 2016. After solid GDP growth in 2004–07, the economy slowed in 2008, and contracted in 2009, before returning to modest, positive growth from 2010–15. Lower oil prices in 2015 caused growth to slow (to 0.9%), increased unemployment (to 4.4%) and weakened the Norwegian krone. The weak krone has made Norwegian exports cheaper for foreign buyers.

Ukraine

After Russia, the Ukrainian republic was the most important economic region of the former Soviet Union, producing about four times the output of the next-ranking republic. Ukraine's dependence on Russia for energy supplies and a lack of significant structural reform have made the Ukrainian economy vulnerable to external shocks. Russia's occupation of Crimea in March 2014 and ongoing aggression in eastern Ukraine have hurt economic growth. Ukraine's economy contracted by 6.8% in 2014 and by an estimated 10.5% in 2015. Ukraine and Russia have engaged in a trade war, with trade sharply reduced between the countries by the end of 2015, opening opportunities for other export economies.

Spain

After experiencing a prolonged recession in the wake of the 2008 global financial crisis, Spain marked the first full year of positive economic growth in 2014, largely due to increased private consumption. Until 2014, credit contraction in the private sector, fiscal austerity and high unemployment weighed on domestic consumption and investment. The rate of unemployment rose from 8% in 2007 to over 26% in 2013, with a modest reduction to 22% in 2015. Rising labour productivity and an internal devaluation have helped to improve foreign investor interest in the economy and positive FDI flows have been restored.

Nigeria

Nigeria has emerged as Africa's largest economy, with 2015 GDP estimated at US\$1.1 trillion. Because of lower oil prices, GDP growth in 2015 fell to around 3%, and government revenues declined, while the non-oil sector also contracted due to economic policy uncertainty. Nigeria's economic growth over the last five years has been driven by growth in agriculture, telecommunications and services. Economic diversification and strong growth have not translated into a significant decline in poverty levels, however, with more than 62% of Nigeria's 170 million people still living in extreme poverty.

South Africa

South Africa is the second largest economy in Africa, after Nigeria. South Africa is a middle-income, emerging market with an abundant supply of natural resources; well-developed financial, legal, communications, energy and transport sectors; and a stock exchange that is Africa's largest and among the top 20 in the world. Economic growth has decelerated in recent years, slowing to just 1.5% in 2014. Unemployment, poverty and inequality – among the highest in the world – remain a challenge. Over one-third of the population is living below the poverty line. Unemployment stands at roughly 25%, and is particularly high among black youth. The country faces structural constraints that limit economic growth, such as skills shortages, declining global competitiveness and frequent work stoppages due to strike action.

Saudi Arabia

Saudi Arabia has an oil-based economy with strong government controls over major economic activities. It possesses about 16% of the world's confirmed petroleum reserves, ranks as the largest exporter of petroleum, and plays a leading role in the Organization of the Petroleum Exporting Countries (OPEC). The petroleum sector accounts for roughly 87% of budget revenues, 42% of GDP and 90% of export earnings. In 2015, the Kingdom incurred a budget deficit estimated at 13% of GDP, and it faced a deficit of US\$87 billion in 2016, which was due to be financed by bond sales and drawing down reserves. Although Saudi Arabia can finance high deficits for several years by drawing down its considerable foreign assets or by borrowing, it announced plans to cut capital spending in 2016.

Russia

Russia has undergone significant changes since the collapse of the Soviet Union, moving from a centrally planned economy towards a more market-based system. Both economic growth and reform have stalled in recent years, however, and Russia remains a predominantly statist economy with a high concentration of wealth. The economy, which averaged 7% growth during 1998–2008 as oil prices rose rapidly, has since seen diminishing growth rates due to the exhaustion of Russia's commodity-based growth model. A combination of falling oil prices, international sanctions and structural limitations pushed Russia into a deep recession in 2015, with the GDP falling by close to 4%. Most economists expect this downturn to continue through the short to medium term.

Thailand

With a well-developed infrastructure, a free-enterprise economy and generally pro-investment policies, Thailand has historically had a strong economy. However, it experienced slow growth in 2013–15, because of domestic political turmoil and sluggish global demand. Following the May 2014 *coup d'état*, tourism decreased 6–7%, but is beginning to recover. The Thai baht depreciated more than 8% during 2015. Thailand faces labour shortages and has attracted an estimated 2–4 million migrant workers from neighbouring countries. Real GDP growth of 2.5% was experienced in 2015. GDP per capita nonetheless remained low at US\$16,100 in 2015, placing the country 100th in the world.

Malaysia

Malaysia, a middle-income country, has transformed itself since the 1970s from a producer of raw materials into an emerging multisector economy. The country is 29th in the world in terms GDP (PPP), which stood at US\$813.5 billion in 2015. Malaysia's economy grew at 4.7% in real terms in 2015. Malaysia enjoys a low unemployment rate of 2.7%, with a mere 3.8% of its population living below the poverty line.

Qatar

Qatar has prospered in the last several years, with continued high real GDP growth, but low oil prices have dampened the outlook. Qatar was the only Gulf Cooperation Council member that did not experience a budget deficit in 2015; however, it projected a US\$12.8 billion deficit, 6% of GDP, in 2016. GDP is driven largely by the oil and gas sector, but growth in manufacturing, construction and financial services has lifted the non-oil sectors to just over half of Qatar's nominal GDP. Qatar's successful 2022 World Cup bid is accelerating large-scale infrastructure projects such as Qatar's metro system, light rail system, construction of a new port, roads, stadiums and related sports infrastructure.

Sri Lanka

Sri Lanka continues to experience strong economic growth, 5.5% in real terms in 2015. The government has been pursuing large-scale reconstruction and development projects in an effort to spur growth in war-torn and disadvantaged areas, develop SMEs and increase agricultural productivity. The new government in 2015 drastically increased wages for public sector employees, which boosted demand for consumer goods but hurt the overall balance of payments and reduced foreign exchange reserves.

Switzerland

Switzerland, a country that espouses neutrality, is a prosperous and modern market economy with low unemployment, a highly skilled labour force and a per capita GDP among the highest in the world (US\$59,300). Its economic and political stability, transparent legal system, exceptional infrastructure, efficient capital markets and low corporate tax rates also make Switzerland one of the world's most competitive economies. However, the franc's strength has made Swiss exports less competitive and weakened the country's growth outlook; GDP growth fell below 2% per year from 2011–15.

Marketing Plan 1 – Frozen crustaceans

Product:	030619 – Frozen crustaceans (excl. of 0306.11–0306.14); frozen flours/meals/pellets of crustaceans, fit for human consumption				
Details	Market 1 – Italy	Market 2 – Spain	Market 3 – United States	Market 4 – United Kingdom	Market 5 – The Netherlands
Key market characteristics	<ul style="list-style-type: none"> Population: 59.8 million 245,000 tons of seafood consumed by 2017 (Mintel Group Ltd) Italian diet traditionally favours fish and seafood <p>Source: www.agr.gc.ca/</p>	<ul style="list-style-type: none"> Population: 46.8 million Spaniards consumed more than 26kg of fish and seafood per capita in 2013, a rate that was second only to that of Portugal (27kg per capita) among EU member states Spain is the largest importer of fish and seafood in the EU <p>Source: www.agr.gc.ca/</p>	<ul style="list-style-type: none"> Population: 318.9 million Americans consumed 1.6 million tons of seafood in 2015 <p>Source: <i>Euromonitor 2016</i>¹</p>	<ul style="list-style-type: none"> Population: 64.1 million 	<ul style="list-style-type: none"> Population: 16.8 million
Lead export countries	Spain	Norway	China and Chile	Bangladesh and India	Germany
Average price of commodity in 2015 from lead exporter	US\$9,505 per ton	US\$2,261 per ton		US\$7,333 and US\$9,341 per ton, respectively	US\$3,549.89 per ton
Marketing initiatives unique to specific country					
	<ul style="list-style-type: none"> Target the premium/high-end segment. Do not compete in medium- or low-end segment, because of cheaper prices coming from Spain and other competitors. Participate and display at the Mediterranean Seafood Exhibition. Ensure that labelling is done in local language. Carry out samplings at major supermarkets during peak periods, e.g. month end and Lent (Italy is predominantly Catholic), etc. 	<ul style="list-style-type: none"> Target the premium/high-end segment. Do not compete in medium- or low-end segment, because of cheaper domestic prices and other competitors such as Norway. Participate and display at the Seafood Expo Southern Europe and/or the Conxemar Trade Show. Ensure that labelling is done in local language. Carry out samplings at major supermarkets during peak periods, e.g. month end and Lent (Spain is predominantly Catholic), etc. 	<ul style="list-style-type: none"> Target the premium/high-end segment. Do not compete in medium- or low-end segment, because of cheaper domestic prices and other competitors such as China and Chile. Participate and display at the Seafood Expo North America. Ensure that labelling is done in English and Spanish to target the Hispanic market. Target the diaspora markets located predominantly on the East Coast. 	<ul style="list-style-type: none"> Target the premium/high-end segment. Do not compete in medium- or low-end segment, because of cheaper domestic prices and other competitors such as Bangladesh and India. Participate and display at the Aquaculture Expo. Target the diaspora market. 	<ul style="list-style-type: none"> Target the premium/high-end segment. Do not compete in medium- or low-end segment, because of cheaper domestic prices and other competitors such as Germany. Participate and display at the Seafood Expo Global. Ensure that labelling is done in English and the local language.
Marketing initiatives for all countries					
Marketing initiatives for government			Marketing initiatives for the private sector		
<ul style="list-style-type: none"> Develop market intelligence and trends data on a biannual basis and disseminate to stakeholders. Partner with embassies and consulates to collect and disseminate market information. 			<ul style="list-style-type: none"> Partner with embassies and consulates to promote products, especially at embassy-hosted events. Use the strength of the Caribbean brand married with the Jamaican brand. Explore creative packaging and innovative use of product. Identify and target main distributors, supermarkets, restaurant chains and major caterers. Carry out samplings at major supermarkets during peak periods, e.g. month end, etc. 		

Marketing Plan 2 – Cheese

Product:	040690 – Cheese				
Details	Market 1 – Germany	Market 2 – Russia	Market 3 – Italy	Market 4 – UK	Market 5 – Belgium
Key market characteristics	<ul style="list-style-type: none"> Population: 80.6 million Germany imported 547,086 tons of cheese in 2015 Cheese imports grew at an average annual rate of 2.6% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 143.5 million Russians imported 142,272 tons of cheese in 2015, down 37% compared to 2014 Cheese imports declined at an average annual rate of -11.3% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 59.8 million Italy imported 254,697 tons of cheese in 2015 Cheese imports grew at an average annual rate of 0.87% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 64.1 million The UK imported 232,037 tons of cheese in 2015 Cheese imports grew at an average annual rate of 3.9% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 11.2 million Cheese is set to grow an average of 2% at constant 2015 prices over the medium term, according to Euromonitor² Main growth will come from authentic and local products Belgium imported more than 184,000 tons of cheese in 2015
Lead export countries	Netherlands	Belarus	Germany	Ireland	Netherlands
Average price of commodity in 2015 from lead exporter	US\$4,098.62 per ton	US\$3,883.19 per ton	US\$3,181.25 per ton	US\$3,464.62 per ton	US\$3,931.01 per ton
Marketing initiatives unique to specific country					
	<ul style="list-style-type: none"> Participate and display at appropriate cheese/ culinary expos in Germany. Germans are keen on fair trade and organic produce; this could be a suitable positioning for products that meet the relevant requirements. 	<ul style="list-style-type: none"> Participate and display at appropriate cheese/ culinary expos in Russia. 	<ul style="list-style-type: none"> Participate and display at appropriate cheese/ culinary expos in Italy. 	<ul style="list-style-type: none"> Participate and display at appropriate cheese/ culinary expos in UK. Fair trade and organic products are growing in popularity among the British; this could be a suitable positioning for products that meet the relevant requirements. 	<ul style="list-style-type: none"> Participate and display at appropriate cheese/ culinary expos in Belgium. Fair trade and organic products are growing in popularity among Belgians; this could be a suitable positioning for products that meet the relevant requirements.
Marketing initiatives for government			Marketing initiatives for the private sector		
<ul style="list-style-type: none"> Develop market intelligence and trends data on a biannual basis and disseminate to stakeholders. Partner with embassies and consulates to collect and disseminate market information [not relevant to Russia]. 			<ul style="list-style-type: none"> Partner with embassies and consulates to promote products, especially at embassy-hosted events [not relevant to Russia]. Target ethnic (and diaspora in cases of Germany, UK and Belgium) niche markets that are looking for a different taste. Do not try to compete directly with mainstream producers [not relevant to Russia]. Use the strength of the Jamaican brand [not relevant for Russia, Italy]. Build marketing around the unique flavour. Explore creative packaging. Ensure that labelling is done in the local language [not relevant to UK]. Identify and target main distributors, supermarkets, cheese shops, delicatessens and restaurant chains. Carry out samplings at major supermarkets and cheese shops, as well as food fairs/festivals. Position as 'specialty' cheese not easily found elsewhere to appeal to the more discerning customer. 		

Marketing Plan 3 – Wheat/meslin flour

Product:	110100 – Wheat/meslin flour				
Details	Market 1 – Netherlands	Market 2 – Brazil	Market 3 – Indonesia	Market 4 – France	Market 5 – USA
Key market characteristics	<ul style="list-style-type: none"> Population: 16.8 million The Dutch imported 424,217 tons of wheat/meslin flour in 2015 Imports of wheat/meslin flour grew by 3.8% between 2014 and 2015 	<ul style="list-style-type: none"> Population: 200.4 million Brazil imported 305,909 tons of wheat/meslin flour in 2015 Imports grew by 24% between 2014 and 2015 	<ul style="list-style-type: none"> Population: 250 million Indonesia imported 197,589 tons of wheat/meslin flour in 2015 Imports of flour have been contracting at an average annual rate of 29% since 2011 	<ul style="list-style-type: none"> Population: 66 million France imported 322,960 tons of wheat/meslin flour in 2015 Wheat/meslin flour imports grew at an average annual growth rate of 13.8% over the 2011 to 2015 period 	<ul style="list-style-type: none"> Population: 318.9 million The USA imported 245,440 tons of wheat/meslin flour in 2015 The average annual growth rate for wheat imports in the US was 9.5% between 2011 and 2015
Lead export countries	Germany	Argentina	Turkey	Germany	Canada
Average price of commodity in 2015 from lead exporter	US\$314.12 per ton	US\$311.99 per ton	US\$328.54 per ton	US\$377.61 per ton	US\$724.86 per ton
Marketing initiatives unique to specific country					
	<ul style="list-style-type: none"> The Dutch are keen on fair trade and organic produce; this could be a suitable positioning for products that meet the relevant requirements. 	–	–	<ul style="list-style-type: none"> Fair trade and organic products are growing in popularity among the French; this could be a suitable positioning for products that meet the relevant requirements. 	<ul style="list-style-type: none"> Target the diaspora, particularly on the East Coast.
Marketing initiatives for government			Marketing initiatives for the private sector		
<ul style="list-style-type: none"> Develop market intelligence and trends data on a biannual basis and disseminate to stakeholders. Partner with embassies and consulates to collect and disseminate market information. 			<ul style="list-style-type: none"> Partner with embassies and consulates to promote products, especially at embassy-hosted events. Maintain a price of US\$300–\$350 per ton. Use the strength of the Jamaican brand. Build marketing around the unique flavour. Explore creative packaging. Ensure that labelling is done in the local language. Identify and target main distributors, supermarkets, bakeries, etc. Creatively show various uses of wheat/meslin flour, through recipes on packages and/or online. 		

Marketing Plan 4 – Malt extract

Product:	190190 – Malt extract				
Details	Market 1 – China	Market 2 – Japan	Market 3 – USA	Market 4 – Thailand	Market 5 – Nigeria
Key market characteristics	<ul style="list-style-type: none"> Population: 1.357 billion China imported 62,862 tons of malt extract in 2015 Malt extract imports declined at a rate of -2.2% per year between 2011 and 2015 	<ul style="list-style-type: none"> Population: 127.3 million Japan imported 241,211 tons of malt extract in 2015 Malt extract imports contracted at an average rate of -4.5% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 318.9 million The USA imported 117,353 tons of malt extract in 2015 Imports of malt extract in the USA grew at an average yearly rate of 5.4% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 67 million Thailand imported 46,701 tons of malt extract in 2015 Imports of malt extract declined at an average annual rate of -8.8% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 173.6 million Nigeria imported 162,149 tons of malt extract in 2015 There was an average annual decline of -5% of malt extract imports between 2011 and 2015
Lead export countries	New Zealand	Singapore	Canada	Singapore	Ireland
Average price of commodity in 2015 from lead exporter	US\$4,706.59 per ton	US\$1,670.04 per ton	US\$3,002.60 per ton	US\$9,168.86 per ton	US\$2,766.70 per ton
Marketing initiatives for all countries					
Marketing initiatives for government			Marketing initiatives for the private sector		
<ul style="list-style-type: none"> Develop market intelligence and trends data on a biannual basis and disseminate to stakeholders. Partner with embassies and consulates to collect and disseminate market information. 			<ul style="list-style-type: none"> Partner with embassies and consulates to promote products, especially at embassy-hosted events. Use the strength of the Jamaican brand. Build marketing around the unique flavour. Explore creative packaging. Ensure that labelling is done in the local language [not relevant to USA]. Identify and target main distributors, supermarkets, bakeries, etc. Creatively show various uses of malt extract through recipes on packages and/or online. 		

Marketing Plan 5 – Sweet Biscuits

Product:	190531 – Sweet biscuits				
Details	Market 1 – USA	Market 2 – France	Market 3 – UK	Market 4 – Germany	Market 5 – Belgium
Key market characteristics	<ul style="list-style-type: none"> Population: 318.9 million The USA imported 302,166 tons of sweet biscuits in 2015 The average growth rate of sweet biscuit imports was 2.2% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 66 million France imported 181,928 tons of sweet biscuits in 2015 The average growth rate of sweet biscuit imports was 1% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 64.1 million The UK imported 133,151 tons of sweet biscuits in 2015 The average growth rate of sweet biscuit imports was 9.6% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 80.6 million Germany imported 137,539 tons of sweet biscuits in 2015 The average growth rate of sweet biscuit imports was 3.2% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 11.2 million Belgium imported 88,105 tons of sweet biscuits in 2015 The average growth rate of sweet biscuit imports was 5.1% between 2011 and 2015
Lead export countries	Mexico	Belgium	Netherlands	Netherlands	Netherlands
Average price of commodity in 2015 from lead exporter	US\$1,992.36 per ton	US\$2,499.22 per ton	US\$3,152.12 per ton	US\$2,488.61 per ton	US\$2,510.79 per ton
Marketing initiatives unique to specific country					
	<ul style="list-style-type: none"> Ensure that labelling is done in Spanish to accommodate the growing Hispanic market. 	–	–		
Marketing initiatives for government			Marketing initiatives for the private sector		
<ul style="list-style-type: none"> Develop market intelligence and trends data on a biannual basis and disseminate to stakeholders. Partner with embassies and consulates to collect and disseminate market information. 			<ul style="list-style-type: none"> Partner with embassies and consulates to promote products, especially at embassy-hosted events. Target ethnic and diaspora niche markets that are looking for a different taste. Do not try to compete directly with mainstream producers. Participate and display at appropriate culinary expos. Use the strength of the Jamaican brand. Create unique flavours that portray the Jamaican brand, e.g. banana, ginger, etc. and build marketing around the unique Jamaican/Caribbean flavour. Explore creative packaging. Ensure that labelling is done in the local language (not relevant in USA, UK). Identify and target main distributors and supermarket chains. Carry out samplings at major supermarkets. Develop products to cater to specialty niches, such as sugar-free biscuits to target people with diabetes. 		

Marketing Plan 6 – Bread, pastry, cakes, biscuits and other bakers' wares

Product:	190590 – Bread, pastry, cakes, biscuits and other bakers' wares				
Details	Market 1 – USA	Market 2 – UK	Market 3 – Germany	Market 4 – France	Market 5 – Canada
Key market characteristics	<ul style="list-style-type: none"> Population: 318.9 million The USA imported 766,040 tons of breads, pastry, cakes, etc. in 2015 The average growth rate of imports of breads, pastry, cakes, etc. was 9% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 64.1 million The UK imported 663,792 tons of breads, pastry, cakes, etc. in 2015 The average growth rate of imports of breads, pastry, cakes, etc. was 9.4% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 80.6 million Germany imported 488,937 tons of breads, pastry, cakes, etc. in 2015 The average growth rate of imports of breads, pastry, cakes, etc. was 4.9% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 66 million France imported 477,992 tons of breads, pastry, cakes, etc. in 2015 The average growth rate of imports of breads, pastry, cakes, etc. was 7.4% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 35.16 million Canada imported 347,740 tons of breads, pastry, cakes, etc. in 2015 The average growth rate of imports of breads, pastry, cakes, etc. was 8.4% between 2011 and 2015
Lead export countries	Canada	Germany	France	Germany	USA
Average price of commodity in 2015 from lead exporter	US\$3,444.28 per ton	US\$2,101.03 per ton	US\$2,194.30 per ton	US\$1,706.04 per ton	US\$3,133.98 per ton
Marketing initiatives unique to specific country					
	<ul style="list-style-type: none"> Ensure that labelling is done in Spanish to accommodate the growing Hispanic market. 	–	–		<ul style="list-style-type: none"> Ensure that labelling is done in English and French.
Marketing initiatives for government			Marketing initiatives for the private sector		
<ul style="list-style-type: none"> Develop market intelligence and trends data on a biannual basis and disseminate to stakeholders. Partner with embassies and consulates to collect and disseminate market information. 			<ul style="list-style-type: none"> Partner with embassies and consulates to promote products, especially at embassy-hosted events. Target ethnic and diaspora niche markets that are looking for a different taste. Do not try to compete directly with mainstream producers. Participate and display at appropriate culinary expos. Use the strength of the Jamaican brand. Create unique flavours that portray the Jamaican brand and build marketing around the unique Jamaican/Caribbean flavour. Explore creative packaging. Ensure that labelling is done in the local language (relevant to Germany, France only). Identify and target main distributors, supermarket chains, bakeries, etc. Carry out samplings at major supermarkets. Develop products to cater to specialty niches, such as sugar-free biscuits to target people with diabetes. 		

Marketing Plan 7 – Juice of any single fruit/vegetable

Product:	200980 – Juice of any single fruit/vegetable				
Details	Market 1 – USA	Market 2 – Germany	Market 3 – Netherlands	Market 4 – Japan	Market 5 – France
Key market characteristics	• Population: 318.9 million	• Population: 80.6 million	• Population: 16.8 million	• Population: 127.3 million	• Population: 66 million
Lead export countries	n/a	n/a	n/a	n/a	n/a
Average price of commodity in 2015 from lead exporter	n/a	n/a	n/a	n/a	n/a
Marketing initiatives unique to specific country					
	• Ensure that labelling is done in Spanish to accommodate the growing Hispanic market.	–	–		• Fair trade is a moderate but growing trend in France, and can be used to justify higher prices.
Marketing initiatives for government			Marketing initiatives for the private sector		
<ul style="list-style-type: none"> • Develop market intelligence and trends data on a biannual basis and disseminate to stakeholders. • Partner with embassies and consulates to collect and disseminate market information. 			<ul style="list-style-type: none"> • Partner with embassies and consulates to promote products, especially at embassy-hosted events. • Target ethnic (and diaspora in the case of USA) niche markets that are looking for a different taste. Do not try to compete directly with mainstream producers. • Participate and display at appropriate food and beverage or culinary expos. • Use the strength of the Jamaican brand and Caribbean brands. • Create unique flavours that portray the Jamaican brand, e.g. local fruits (mango, guava, june plums, etc.) and build marketing around the unique Jamaican/Caribbean flavour. • Explore creative packaging. • Ensure that labelling is done in the local language [not relevant to USA]. • Identify and target main distributors, supermarket chains, restaurants, bars, etc. • Carry out samplings at major supermarkets and fairs. • Develop products to cater to specialty niches, such as sugar-free juices to target people with diabetes. • There is a growing trend towards organic produce; this could be a suitable positioning once products meet relevant requirements. • Fresh, natural and healthy positioning is also suitable for this market. • Fair trade is also big in Germany, the Netherlands and Japan, and can be used to justify higher prices. 		

Marketing Plan 8 – Sauces

Product:	210390 – Sauces				
Details	Market 1 – France	Market 2 – Germany	Market 3 – Netherlands	Market 4 – Nigeria	Market 5 – Japan
Key market characteristics	<ul style="list-style-type: none"> Population: 66 million In 2015, France imported 165,206 tons of sauces The average annual growth rate of imports of sauces was 6.2% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 80.6 million In 2015, Germany imported 128,496 tons of sauces The average annual growth rate of imports of sauces was 1.5% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 16.8 million In 2015, the Netherlands imported 107,728 tons of sauces The average annual growth rate of imports of sauces was 4% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 173.6 million In 2015, Nigeria imported 28,194 tons of sauces The average annual growth rate of imports of sauces was 16% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 127.3 million In 2015, Japan imported 92,126 tons of sauces The average annual growth rate of imports of sauces was 2% between 2011 and 2015
Lead export countries	Belgium	Netherlands	Germany	China	Thailand
Average price of commodity in 2015 from lead exporter	US\$2,083.98 per ton	US\$2,964.71 per ton	US\$2,284.73 per ton	US\$3,261.33 per ton	US\$2,625.37 per ton
Marketing initiatives unique to specific country					
	<ul style="list-style-type: none"> There is a moderate but growing trend for fair trade and organic produce in France; this could be a suitable positioning for products that meet relevant requirements. 			<ul style="list-style-type: none"> Build on the similarities in taste to Nigerian products (e.g. spiciness, tropical flavours, etc.), but also show the uniqueness of the products. 	<ul style="list-style-type: none"> Cater tastes to suit the local market as Japanese are not accustomed to strong flavours (e.g. spiciness).
Marketing initiatives for government			Marketing initiatives for the private sector		
<ul style="list-style-type: none"> Develop market intelligence and trends data on a biannual basis and disseminate to stakeholders. Partner with embassies and consulates to collect and disseminate market information. 			<ul style="list-style-type: none"> Partner with embassies and consulates to promote products, especially at embassy-hosted events. Target ethnic niche markets that are looking for a different taste [not relevant to Nigeria, Japan]. Do not try to compete directly with mainstream producers [not relevant to Nigeria]. Participate and display at appropriate culinary expos. Use the strength of the Jamaican brand. Build marketing around the unique flavour [not relevant to Nigeria, Japan]. Explore creative packaging. Ensure that labelling is done in the local language [not relevant to Nigeria]. Identify and target main distributors, supermarkets and restaurant chains. Carry out samplings at major supermarkets and food fairs/festivals. Trends for fair trade and organic produce are big in Germany and the Netherlands; this could be a suitable positioning for products that meet relevant requirements. Position also as 'specialty' products not easily found elsewhere to appeal to the more discerning customer [not relevant to Nigeria]. 		

Marketing Plan 9 – Food preparations

Product:	210690 – Food preparations				
Details	Market 1 – Germany	Market 2 – Canada	Market 3 - Australia	Market 4 – Netherlands	Market 5 – Japan
Key market characteristics	<ul style="list-style-type: none"> Population: 80.6 million In 2015, Germany imported 307,872 tons of food preparations The average annual growth rate of imports of food preparations was 3.9% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 35.16 million In 2015, Canada imported 255,475 tons of food preparations The average annual growth rate of imports of food preparations was 3.0% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 23.13 million In 2015, Australia imported 165,614 tons of food preparations The average annual growth rate of imports of food preparations was 9.6% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 16.8 million In 2015, the Netherlands imported 229,648 tons of food preparations The average annual growth rate of imports of food preparations was 3.5% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 127.3 million In 2015, Japan imported 406,383 tons of food preparations The average annual growth rate of imports of food preparations was 1.3% between 2011 and 2015
Lead export countries	Netherlands	USA	Thailand	Germany	Rep. Korea
Average price of commodity in 2015 from lead exporter	US\$3,538.08 per ton	US\$4,857.64 per ton	US\$1,477.44 per ton	US\$2,531.10 per ton	US\$1,105.86 per ton
Marketing initiatives for government			Marketing initiatives for the private sector		
<ul style="list-style-type: none"> Develop market intelligence and trends data on a biannual basis and disseminate to stakeholders. Partner with embassies and consulates to collect and disseminate market information. 			<ul style="list-style-type: none"> Partner with embassies and consulates to promote products, especially at embassy-hosted events. Target ethnic markets that are looking for a different taste. Do not try to compete directly with mainstream producers. Use the strength of the Jamaican brand. Create unique flavours that portray the Jamaican brand and build marketing around the unique Jamaican/Caribbean flavour. Explore creative packaging. Ensure that labelling is done in the local language (not relevant to Canada, Australia). Identify and target main distributors, supermarket chains, bakeries, etc. Carry out samplings at major supermarkets. Develop products to cater to specialty niches, such as sugar-free products for people with diabetes. 		

Marketing Plan 10 – Water

Product:	220210 – Water				
Details	Market 1 – Belgium	Market 2 – Germany	Market 3 – France	Market 4 – Netherlands	Market 5 – Canada
Key market characteristics	<ul style="list-style-type: none"> Population: 11.2 million In 2015, Belgium imported 806,463 cubic metres of water The average annual growth rate of imports of water was 3.2% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 80.6 million In 2015, Germany imported 719,834 tons of water The average annual growth rate of imports of water was 7.2% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 66 million In 2015, France imported 594,632 tons of water The average annual growth rate of imports of water was 3.6% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 16.8 million In 2015, the Netherlands imported 587,097 tons of water The average annual growth rate of imports of water was 2.5% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 35.16 million In 2015, Canada imported 441,296 tons of water The average annual growth rate of imports of water was 9.8% between 2011 and 2015
Lead export countries	France	Austria	Belgium	Germany	USA
Average price of commodity in 2015 from lead exporter	US\$603.67 per ton	US\$1,598.47 per ton	US\$569.31 per ton	US\$344.42 per ton	US\$673.31 per ton
Marketing initiatives for government			Marketing initiatives for the private sector		
<ul style="list-style-type: none"> Develop market intelligence and trends data on a biannual basis and disseminate to stakeholders. Partner with embassies and consulates to collect and disseminate market information. 			<ul style="list-style-type: none"> Partner with embassies and consulates to promote products, especially at embassy-hosted events. Use the strength of the Jamaican brand – <i>'the land of wood and water'</i>. Explore creative packaging. Ensure that labelling is done in the local language (not relevant to Canada). Identify and target main distributors, supermarket chains, restaurants, bars, etc. Target the natural and healthy niches as suitable positioning for this market. Continuously modify products based on market needs, by adding flavours to the water based on consumer demand. This is a very saturated market. Do not try to compete with mainstream products. Focus on niches – health, premium/quality. Packaging will be key to gaining access in these niches. Use images of Usain Bolt and Jamaican athletes to promote Jamaican water (health, energy, vitality) – like USA marketing strategy for its cotton industry. 		

Marketing Plan 11 – Non-alcoholic beverages (excl. water)

Product:	220290 – Non-alcoholic beverages (excl. water)				
Details	Market 1 – Germany	Market 2 – Netherlands	Market 3 – France	Market 4 – Spain	Market 5 – China (Hong Kong)
Key market characteristics	<ul style="list-style-type: none"> Population: 80.6 million In 2015, Germany imported 332,603 tons of non-alcoholic beverages The average annual growth rate of imports of non-alcoholic beverages was 6.1% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 16.8 million In 2015, the Netherlands imported 231,426 tons of non-alcoholic beverages The average annual growth rate of imports of non-alcoholic beverages was 6.7% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 66 million In 2015, France imported 250,798 tons of non-alcoholic beverages The average annual growth rate of imports of non-alcoholic beverages was 4.7% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 46.8 million In 2015, Spain imported 175,393 tons of non-alcoholic beverages The average annual growth rate of imports of non-alcoholic beverages was 0.7% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 7.2 million In 2015, Hong Kong imported 229,010 tons of non-alcoholic beverages The average annual growth rate of imports of non-alcoholic beverages was 6% between 2011 and 2015
Lead export countries	Austria	Germany	Germany	France	China (PR)
Average price of commodity in 2015 from lead exporter	US\$594.24 per ton	US\$644.04 per ton	US\$947.53 per ton	US\$972.22 per ton	US\$722.44 per ton
Marketing initiatives for government			Marketing initiatives for the private sector		
<ul style="list-style-type: none"> Develop market intelligence and trends data on a biannual basis and disseminate to stakeholders. Partner with embassies and consulates to collect and disseminate market information. 			<ul style="list-style-type: none"> This is a very saturated market. Do not try to compete with mainstream products. Focus on niches – health, premium/quality. Packaging will be key to gaining access in these niche markets. Use images of Usain Bolt and other Jamaican athletes to promote Jamaican beverages (health, energy, vitality) – similar to US marketing for its cotton industry. Partner with embassies and consulates to promote products, especially at embassy-hosted events. Target ethnic niche markets that are looking for a different taste. Participate and display at appropriate food and beverage or culinary expos. Use the strength of the Jamaican brand and Caribbean brands. Create unique flavours that portray the Jamaican brand, e.g. local fruits (mango, guava, june plums, etc.) and build marketing around the unique Jamaican/Caribbean flavour. Explore creative packaging. Ensure that labelling is done in the local language. Identify and target main distributors, supermarket chains, restaurants, bars, etc. Carry out samplings at major supermarkets and fairs. Develop products to cater to specialty niches, such as sugar-free juices to target people with diabetes. There is a growing trend towards organic; this could be a suitable positioning once products meet necessary requirements. Fresh, natural and healthy positioning is also suitable for this market. 		

Marketing Plan 12 – Beer made from malt

Product:	220300 – Beer made from Malt				
Details	Market 1 – France	Market 2 – Germany	Market 3 – Italy	Market 4 – Netherlands	Market 5 – Belgium
Key market characteristics	<ul style="list-style-type: none"> Population: 66 million In 2015, France imported 728,596 tons of beer The average annual growth rate of imports of beer was 0.9% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 80.6 million In 2015, Germany imported 650,279 tons of beer The average annual growth rate of imports of beer was 3.9% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 59.8 million In 2015, Italy imported 696,951 tons of beer The average annual growth rate of imports of beer was 2.3% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 16.8 million In 2015, the Netherlands imported 362,955 tons of beer The average annual growth rate of imports of beer was 9.7% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 11.2 million In 2015, Belgium imported 241,989 cubic metres of beer The average annual growth rate of imports of beer was 2.3% between 2011 and 2015
Lead export countries	Belgium	Denmark	Germany	Belgium	Netherlands
Average price of commodity in 2015 from lead exporter	US\$969.06 per ton	US\$868.66 per ton	US\$789.92 per ton	US\$757.37 per ton	US\$859.36 per ton
Marketing initiatives for government			Marketing initiatives for the private sector		
<ul style="list-style-type: none"> Develop market intelligence and trends data on a biannual basis and disseminate to stakeholders. Partner with embassies and consulates to collect and disseminate market information. 			<ul style="list-style-type: none"> This is a very saturated market. Do not try to compete with mainstream products. Focus on ethnic niches looking for a unique taste. Partner with embassies and consulates to promote products, especially at embassy-hosted events. Target ethnic niche markets that are looking for a different taste. Do not try to compete directly with mainstream producers. Participate and display at appropriate food and beverage or culinary expos. Use the strength of the Jamaican and Caribbean brands. Ensure that labelling is done in the local language. Identify and target main distributors, supermarket chains, restaurants, bars, etc. Carry out samplings at major supermarkets and fairs. There is a growing trend towards organic products. Organic beer could be a possible niche market. 		

Marketing Plan 13 – Vermouth and other wine of fresh grapes

Product:	220510 – Vermouth and other wine of fresh grapes flavoured with plants/aromatic substance, in containers of 2 l/less				
Details	Market 1 – Russia	Market 2 – Belgium	Market 3 – France	Market 4 – USA	Market 5 – Germany
• Key market characteristics	<ul style="list-style-type: none"> Population: 143.5 million In 2015, Russia imported 22,769 tons of vermouth The average annual growth rate of imports of vermouth was 16.9% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 11.2 million In 2015, Belgium imported 20,280 cubic metres of vermouth The average annual growth rate of imports of vermouth was 2.4% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 66 million In 2015, France imported 28,011 cubic metres of vermouth The average annual growth rate of imports of vermouth was 2.3% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 318.9 million In 2015, the USA imported 16,906 tons of vermouth The average annual growth rate of imports of vermouth was 16.3% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 80.6 million In 2015, Germany imported 20,957 tons of vermouth The average annual growth rate of imports of vermouth was 14.3% between 2011 and 2015
Lead export countries	Italy	Spain	Italy	Italy	Italy
Average price of commodity in 2015 from lead exporter	US\$1,589.35 per ton	US\$2,677.42 per ton	US\$1,838.01 per ton	US\$3,736.58 per ton	US\$1,465.27 per ton
Marketing initiatives for government			Marketing initiatives for the private sector		
<ul style="list-style-type: none"> Develop market intelligence and trends data on a biannual basis and disseminate to stakeholders. Partner with embassies and consulates to collect and disseminate market information. 			<ul style="list-style-type: none"> Partner with embassies and consulates to promote products, especially at embassy-hosted events. Target ethnic niche markets that are looking for a different taste. Participate and display at appropriate wine, food and beverage, or culinary expos. Ensure that labelling is done in the local language (not relevant for USA). Identify and target main distributors, supermarket chains, restaurants, bars, etc. Carry out samplings at major supermarkets and fairs. 		

Marketing Plan 14 – Rum and tafia

Product:	220840 – Rum and tafia				
Details	Market 1 – Spain	Market 2 – Russia	Market 3 – Italy	Market 4 – France	Market 5 – UK
Key market characteristics	<ul style="list-style-type: none"> Population: 46.8 million In 2015, Spain imported 44,530 tons of rum and tafia The average annual growth rate of imports of rum and tafia was 2.2% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 143.5 million In 2015, Russia imported 8,154 tons of rum and tafia The average annual growth rate of imports of rum and tafia was 5.2% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 59.8 million In 2015, Italy imported 12,843 tons of rum and tafia The average annual growth rate of imports of rum and tafia was 0.2% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 66 million In 2015, France imported 8,126 tons of rum and tafia The average annual growth rate of imports of rum and tafia was 6.8% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 64.1 million In 2015, the United Kingdom imported 25,108 tons of rum and tafia The average annual growth rate of imports of rum and tafia was 17.2% between 2011 and 2015
Lead export countries	Cuba	UK	Venezuela	Spain	Germany
Average price of commodity in 2015 from lead exporter	US\$2,042.57 per ton	US\$2,229.24 per ton	US\$2,743.48 per ton	US\$4,970.14 per ton	US\$5,687.59 per ton
Marketing initiatives for government			Marketing initiatives for the private sector		
<ul style="list-style-type: none"> Develop market intelligence and trends data on a biannual basis and disseminate to stakeholders. Partner with embassies and consulates to collect and disseminate market information. 			<ul style="list-style-type: none"> Partner with embassies and consulates to promote products, especially at embassy-hosted events. Target ethnic niche markets that are looking for a different taste. Participate and display at appropriate wine, food and beverage, or culinary expos. Use the strength of the Jamaican brand. Ensure that labelling is done in the local language (except for UK). Identify and target main distributors, supermarket chains, restaurants, bars, etc. Carry out samplings at major supermarkets and fairs. 		

Marketing Plan 15 – Preparations – animal feeding

Product:	230990 – Preparations of a kind used in animal feeding				
Details	Market 1 – Germany	Market 2 – Russia	Market 3 – Netherlands	Market 4 – Belgium	Market 5 – USA
Key market characteristics	<ul style="list-style-type: none"> Population: 80.6 million In 2015, Germany imported 1,295,815 tons of animal feed The average annual growth rate of imports of animal feed was 0.1% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 143.5 million In 2015, Russia imported 312,816 tons of animal feed The average annual growth rate of imports of animal feed was 2.1% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 16.8 million In 2015, Netherlands imported 1,610,946 tons of animal feed The average annual growth rate of imports of animal feed was 8% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 11.2 million In 2015, Belgium imported 1,093,246 tons of animal feed The average annual growth rate of imports of animal feed was 5.1% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 318.9 million In 2015, the USA imported 444,188 tons of animal feed The average annual growth rate of imports of animal feed was 7% between 2011 and 2015
Lead export countries	Netherlands	France	Germany	Netherlands	Canada
Average price of commodity in 2015 from lead exporter	US\$502.17 per ton	US\$1,482.72 per ton	US\$180.17 per ton	US\$477.60 per ton	US\$965.40 per ton
Marketing initiatives for government			Marketing initiatives for the private sector		
<ul style="list-style-type: none"> Develop market intelligence and trends data on a biannual basis and disseminate to stakeholders. 			<ul style="list-style-type: none"> Participate and display at appropriate agricultural expos. Identify and target main distributors, agricultural wholesalers, farmers, agricultural retail shops and agricultural co-operatives. Carry out demonstration campaigns at co-operatives and fairs. Target mainly small to medium-sized farms and co-operatives. Promote as a premium, top-grade product using the best inputs and raw materials. Focus first on quality and then price. Show value for money. 		

Marketing Plan 16 – Limestone flux

Product:	252100 – Limestone flux; limestone and other calcareous stone, of a kind used for the manufacture of lime/cement				
Details	Market 1 – India	Market 2 – Japan	Market 3 – Korea (Rep.)	Market 4 – Germany	Market 5 – Netherlands
Key market characteristics	<ul style="list-style-type: none"> Population: 1.252 billion In 2015, India imported 14,564,220 tons of limestone flux The average annual growth rate of imports of limestone flux was 21.1% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 127.3 million In 2015, Japan imported 749,249 tons of limestone flux The average annual growth rate of imports of limestone flux was 8.3% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 50.22 million In 2015, Korea (Rep.) imported 1,772,184 tons of limestone flux The average annual growth rate of imports of limestone flux was 1.2% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 80.6 million In 2015, Germany imported 2,279,470 tons of limestone flux The average annual growth rate of imports of limestone flux was 1% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 16.8 million In 2015, the Netherlands imported 661,863 tons of limestone flux The average annual growth rate of imports of limestone flux was 11.3% between 2011 and 2015
Lead export countries	United Arab Emirates	Vietnam	Japan	Belgium	Belgium
Average price of commodity in 2015 from lead exporter	US\$17.44 per ton	US\$78.49 per ton	US\$19.60 per ton	US\$7.37 per ton	US\$19.88 per ton
Marketing initiatives unique to specific country					
	<ul style="list-style-type: none"> India is a huge market. Concentrate on developing a strong network of dealers that have strongholds in strategic areas in India. This should be the first and main level of distribution. 	<ul style="list-style-type: none"> Concentrate on developing a strong network of dealers that have strongholds in strategic areas in Japan. This should be the first and main level of distribution. Japan is a peculiar market that favours local brands over foreign brands. Consider creating ties with local companies or rebranding for local consumption. 	<ul style="list-style-type: none"> Concentrate on developing a strong network of dealers. This should be the first and main level of distribution. 	<ul style="list-style-type: none"> Concentrate on developing a strong network of dealers that have strongholds in strategic areas in Germany. This should be the first and main level of distribution. 	<ul style="list-style-type: none"> Concentrate on developing a strong network of dealers that have strongholds in strategic areas in the Netherlands. This should be the first and main level of distribution.
Marketing initiatives for government			Marketing initiatives for the private sector		
			<ul style="list-style-type: none"> Focus on product quality to create differentiation. Germany and the Netherlands, in particular, are markets that value quality. Identify and employ a market representative fluent in the local language/dialect to act as a sales agent 		

Marketing Plan 17 – Cement clinkers

Product:	252310 – Cement clinkers				
Details	Market 1 – Ghana	Market 2 – Sri Lanka	Market 3 – Malaysia	Market 4 – Brazil	Market 5 – Saudi Arabia
Key market characteristics	<ul style="list-style-type: none"> Population: 25.9 million In 2015, Ghana imported 2,770,663 tons of cement clinkers The average annual growth rate of imports of cement clinkers was 11.1% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 20.48 million In 2015, Sri Lanka imported 3,004,847 tons of cement clinkers The average annual growth rate of imports of cement clinkers was 6.4% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 29.72 million In 2015, Sri Lanka imported 2,554,594 tons of cement clinkers The average annual growth rate of imports of cement clinkers was 1.6% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 200.4 million In 2015, Brazil imported 934,089 tons of cement clinkers The average annual growth rate of imports of cement clinkers was 14% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 28.83 million In 2015, Brazil imported 55,323 tons of cement clinkers The average annual growth rate of imports of cement clinkers was 2.7% between 2011 and 2015
Lead export countries	Togo	India	Vietnam	Spain	United Arab Emirates
Average price of commodity in 2015 from lead exporter	US\$80.98 per ton	US\$67.89 per ton	US\$51.85 per ton	US\$54.47 per ton	US\$120.32 per ton
Marketing initiatives for government			Marketing initiatives for the private sector		
			<ul style="list-style-type: none"> Focus on product quality to create differentiation. Concentrate on developing a strong network of dealers that have strongholds in strategic areas. This should be the first and main level of distribution. Some second-tier relationships with retailers could also be explored, but only as a second resort. Consider the cost of transportation and storage in this instance [not relevant to Saudi Arabia]. Consider selling in bulk of various weights rather than mere bags [not relevant to Saudi Arabia]. Identify and employ a market representative fluent in the local language/ dialect to act as a sales agent. Target and build a network of contractors, masons, architects, etc. and organise seminars and product demonstrations to them in group settings such as at association levels, e.g. architects associations, chambers of commerce, etc. 		

Marketing Plan 18 – Aluminium ores and concentrates

Product:	260600 – Aluminium ores and concentrates				
Details	Market 1 – China	Market 2 – Ireland	Market 3 – Spain	Market 4 – Ukraine	Market 5 – Germany
Key market characteristics	<ul style="list-style-type: none"> Population: 1.36 billion In 2015, China imported 56,012,218 tons of aluminium ores The average annual growth rate of imports of aluminium ores was 5.8% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 4.6 million In 2015, Ireland imported 4,482,050 tons of aluminium ores The average annual growth rate of imports of aluminium ores was 1.5% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 46.8 million In 2015, Spain imported 3,868,734 tons of aluminium ores The average annual growth rate of imports of aluminium ores was 5.9% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 45.5 million In 2015, Ukraine imported 3,850,183 tons of aluminium ores The average annual growth rate of imports of aluminium ores was 3.6% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 80.6 million In 2015, Germany imported 2,763,891 tons of aluminium ores The average annual growth rate of imports of aluminium ores was 3.2% between 2011 and 2015
Lead export countries	Malaysia	Guinea	Guinea	Guinea	Guinea
Average price of commodity in 2015 from lead exporter	US\$45.93 per ton	US\$49.67 per ton	US\$43.70 per ton	US\$33.45 per ton	US\$43.32 per ton
Marketing initiatives for government			Marketing initiatives for the private sector		
			<ul style="list-style-type: none"> Differentiation cannot come from product or price, it must come from tailoring solutions to meet specific needs of customers through a combination of reliability, quality, quantity and delivery. There is a need to work on reducing time from purchase order to supply. Strong linkages and relationships must be built with key clients and prospects. This is the most critical marketing tool. 		

Marketing Plan 19 – Aluminium oxide

Product:	281820 – Aluminium oxide (excl. artificial corundum)				
Details	Market 1 – Norway	Market 2 – Iceland	Market 3 – India	Market 4 – Qatar	Market 5 – South Africa
Key market characteristics	<ul style="list-style-type: none"> Population: 5 million In 2015, Norway imported 2,429,860 tons of aluminium oxide The average annual growth rate of imports of aluminium oxide was 2.7% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 323,000 In 2015, Iceland imported 1,645,843 tons of aluminium oxide The average annual growth rate of imports of aluminium oxide was 1.7% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 1.252 billion In 2015, India imported 870,896 tons of aluminium oxide The average annual growth rate of imports of aluminium oxide was 11.2% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 2.17 million In 2015, India imported 870,896 tons of aluminium oxide The average annual growth rate of imports of aluminium oxide was 11.2% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 53 million In 2015, India imported 870,896 tons of aluminium oxide The average annual growth rate of imports of aluminium oxide was 11.2% between 2011 and 2015
Lead export countries	Brazil	Brazil	Australia	Australia	Australia
Average price of commodity in 2015 from lead exporter	US\$326.07 per ton	US\$327.28 per ton	US\$338.34 per ton	US\$328.86 per ton	US\$320.38 per ton
Marketing initiatives for government			Marketing initiatives for the private sector		
			<ul style="list-style-type: none"> Focus on product quality to create differentiation. Jamaica has some of the highest-grade oxides in the world. Concentrate on developing a strong network of dealers that have strongholds in strategic areas. This should be the first and main level of distribution. Some second-tier relationships with users of aluminium oxides could also be explored. Identify and employ a market representative fluent in the local language/dialect to act as a sales agent and to build strategic relationships. Strong linkages and relationships must be built with key clients and prospects. This is the most critical marketing tool. 		

Marketing Plan 20 – Aluminium hydroxide

Product:	281830 – Aluminium hydroxide				
Details	Market 1 – Japan	Market 2 – Korea (Rep.)	Market 3 – Netherlands	Market 4 – Italy	Market 5 – Germany
Key market characteristics	<ul style="list-style-type: none"> Population: 127.3 million In 2015, Japan imported 885,342 tons of aluminium hydroxide The average annual growth rate of imports of aluminium hydroxide was 12.6% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 50.22 million In 2015, South Korea imported 284,408 tons of aluminium hydroxide The average annual growth rate of imports of aluminium hydroxide was 5.6% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 16.8 million In 2015, the Netherlands imported 115,651 tons of aluminium hydroxide The average annual growth rate of imports of aluminium hydroxide was 3.09% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 59.8 million In 2015, Italy imported 244,195 tons of aluminium hydroxide The average annual growth rate of imports of aluminium hydroxide was 24.90% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 80.6 million In 2015, Germany imported 79,273 tons of aluminium hydroxide The average annual growth rate of imports of aluminium hydroxide declined by 1% between 2011 and 2015
Lead export countries	Brazil	China	Ireland	Greece	Ireland
Average price of commodity in 2015 from lead exporter	US\$182.60 per ton	US\$489.63 per ton	US\$348.33 per ton	US\$198.64 per ton	US\$248.09 per ton
Marketing initiatives unique to specific country					
	<ul style="list-style-type: none"> Employ a market representative fluent in the local language, to build strategic relationships. 				
Marketing initiatives for government			Marketing initiatives for the private sector		
			<ul style="list-style-type: none"> Focus on product quality to create differentiation. Jamaica has some of the highest-grade hydroxides in the world. Concentrate on developing a strong network of dealers that have strongholds in strategic areas. This should be the first and main level of distribution. Some second-tier relationships with users of aluminium hydroxides could also be explored. Identify and employ a market representative fluent in the local language/dialect to act as a sales agent and to build strategic relationships [not relevant to Japan]. 		

Marketing Plan 21 – Herbicides, anti-sprouting products and plant-growth regulators

Product:	380893 – Herbicides, anti-sprouting products and plant-growth regulators, put up in forms/packing for retail sale/as preparations/articles				
Details	Market 1 – France	Market 2 – Canada	Market 3 – Germany	Market 4 – Brazil	Market 5 – Australia
Key market characteristics	<ul style="list-style-type: none"> Population: 66 million In 2015, France imported 80,433 tons of herbicides The average annual growth rate of imports of herbicides was 0.5% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 35.16 million In 2015, Canada imported 140,887 tons of herbicides The average annual growth rate of imports of herbicides was 0.9% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 80.6 million In 2015, Germany imported 52,162 tons of herbicides The average annual growth rate of imports of herbicides was 0.7% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 200.4 million In 2015, Brazil imported 100,808 tons of herbicides The average annual growth rate of imports of herbicides was 13.8% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 23.13 million In 2015, Australia imported 100,398 tons of herbicides The average annual growth rate of imports of herbicides was 9.9% between 2011 and 2015
Lead export countries	Belgium	USA	France	Argentina	China
Average price of commodity in 2015 from lead exporter	US\$5,540.37 per ton	US\$4,275.24 per ton	US\$16,111.35 per ton	US\$2,322.19 per ton	US\$2,843.48 per ton
Marketing initiatives for government			Marketing initiatives for the private sector		
			<ul style="list-style-type: none"> Develop market intelligence and trends data on a biannual basis and disseminate to stakeholders. Participate and display at appropriate agricultural expos. Identify and target main distributors, agricultural wholesalers, farmers, agricultural retail shops and agricultural co-operatives. Target mainly small to medium-sized farms and co-operatives. 		

Marketing Plan 22 – Waste and scrap of gold

Product:	711291 – Waste and scrap of gold, incl. metal clad with gold but excl. sweepings containing other precious metals				
Details	Market 1 – Germany	Market 2 – China (Hong Kong)	Market 3 – Canada	Market 4 – Spain	Market 5 – Switzerland
Key market characteristics	<ul style="list-style-type: none"> Population: 80.6 million 	<ul style="list-style-type: none"> Population: 7.2 million 	<ul style="list-style-type: none"> Population: 35.16 million 	<ul style="list-style-type: none"> Population: 46.8 million 	<ul style="list-style-type: none"> Population: 8.08 million
Lead export countries	United Kingdom	China	USA	UK	Indonesia
Average price of commodity in 2015 from lead exporter	n/a	n/a	n/a	n/a	n/a
Marketing initiatives for government			Marketing initiatives for the private sector		
			<ul style="list-style-type: none"> Develop market intelligence and trends data on a biannual basis and disseminate to stakeholders. Build and maintain good relationships with several large precious metals dealers. 		

Marketing Plan 23 – Waste and scrap of cast iron

Product:	720410 – Waste and scrap of cast iron				
Details	Market 1 – Netherlands	Market 2 – Thailand	Market 3 – Malaysia	Market 4 – Germany	Market 5 – Spain
Key market characteristics	<ul style="list-style-type: none"> Population: 16.8 million In 2015, the Netherlands imported 118,953 tons of iron scrap metal The average annual growth rate of imports of iron scrap metal was 14.9% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 67 million In 2015, Thailand imported 190,948 tons of iron scrap metal The average annual growth rate of imports of iron scrap metal was 14.1% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 29.72 million In 2015, Malaysia imported 28,100 tons of iron scrap metal The average annual growth rate of imports of iron scrap metal was 42.3% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 80.6 million In 2015, Germany imported 193,526 tons of iron scrap metal The average annual growth rate of imports of iron scrap metal was 19.8% between 2011 and 2015 	<ul style="list-style-type: none"> Population: 46.8 million In 2015, Spain imported 186,081 tons of iron scrap metal The average annual growth rate of imports of iron scrap metal was 7.2% between 2011 and 2015
Lead export countries	Germany	Australia	Australia	France	Portugal
Average price of commodity in 2015 from lead exporter	US\$412.92 per ton	US\$214.95 per ton	US\$430.32 per ton	US\$204.80 per ton	US\$295.48 per ton
Marketing initiatives for government			Marketing initiatives for the private sector		
			<ul style="list-style-type: none"> Develop market intelligence and trends data on a biannual basis and disseminate to stakeholders. Build and maintain good relationships with several large scrap metals dealers. 		

Notes

1 See: <http://www.euromonitor.com/socio-economics> (accessed 6 June 2017).

2 Ibid.

Annexes

Annex A Identification of new products for Jamaica's exports

Jamaica needs to work hard in developing new products for export, given that its export basket is currently tilted in favour of just a few commodities. 'New products' can be defined as those where Jamaica already has some presence in export markets, but could do much better. The list of new products would exclude those items in which Jamaica has a limited capacity, and may have to start from the scratch. It would also exclude those products where Jamaica is already doing well in export markets.

Obviously, there is a need to define lower and upper limits for new products. A limit of US\$0.3 million per annum is the lowest value of Jamaican exports that may be included in the list of new products. By keeping products

valued at below US\$0.3 million out of consideration, the study attempts to avoid suggesting a product for export where the country has limited capacity and possibly lacks advantage. Further, it is assumed that if Jamaica has capacity to export at least this much value of product, as translated into applicable volumes. The analysis reveals that the country enjoys some competitive advantage and just needs to expand its production line to leverage new export opportunities.

The upper limit is valued at US\$1 million per annum of exports. New products cannot be those which Jamaica is already exporting in large volumes, valued at more than US\$1 million.

So, the new products, as defined in present study, would be those which Jamaica is exporting in the range of US\$0.3 to 1.0 million annually.

Following these criteria, the authors have identified 23 product lines where Jamaica could improve its export performance.

For the list of 23 products, 35 export destinations have been identified. These export destinations were the top global importers in the corresponding product lines. While selecting the top importers, countries which are not accessible to Jamaica for export in a product line were excluded.

The capacity of Jamaica to export 23 new products to 31 identified markets will be determined by its competitiveness in relation to its competitors in each market. In each of the 31 markets, the competitiveness of Jamaica vis-à-vis its top competitors has been estimated. Up to ten top competitors (exporters) were identified in each market (in a few cases, there were fewer than ten top competitors). The authors used the following three well recognised and widely used measures to assess and compare the competitiveness of Jamaica and its competitors: (i) bilateral revealed comparative advantage (BRCA); (ii) contribution to trade balance (CTB); and (iii) market position (POS).

Values for these three measures (*BRCA*, *CTB* and *POS*) for Jamaica were compared with the corresponding values of each competitor. If Jamaica is found to be doing better in terms of *BRCA* plus in at least one of the other two indicators of competitiveness, it was considered to be enjoying a comparative advantage over the competitor/s.

Bilateral revealed comparative advantage

The bilateral revealed comparative advantage (BRCA) compares the ratio of a country's export of a specific

commodity (k) in its overall exports to a partner country (j) with the ratio of the country's export of that specific product in its overall exports to the world. A country is said to have a comparative advantage in the export of product k to country j , if its BRCA is greater than one. BRCA can also be used to make cross-country comparisons. If a country has a greater BRCA than its competitor, it would have a higher comparative advantage and vice-versa.

Algebraically, this can be written as:

$$BRCA = \frac{X_{ij}^k / X_{ij}}{X_{iw}^k / X_{iw}}$$

Where, X =exports, i =exporter country, j =destination country, w =world, and k =commodity.

Contribution to trade balance

The *CEPII* has developed an analytical indicator of comparative advantage based on the trade balance, instead of relative export structures. A country i would have a comparative advantage in product k if the contribution to trade balance (CTB) is positive: this means that product k is a strong point of country i , as it contributes positively to the overall trade balance.

The contribution of product k to the trade balance, in relation to total trade flows (where, X =exports and M =imports), is defined by:

$$CTB = f_{ik} = y_{ik} - g_{ik} \times y_i$$

Where,

$$y_{ik} = 1000 \times \frac{X_{ik} - M_{ik}}{X_i + M_i}$$

$$y_i = 1000 \times \frac{X_i - M_i}{X_i + M_i}$$

$$g_{ik} = \frac{X_{ik} + M_{ik}}{X_i + M_i}$$

Market position

The market position (*POS*) of each country *i* on product *k* measures its international competitiveness. *POS* > 0 would imply that the product is competitive in international markets and vice-versa. *POS* is defined as follows:

$$POS_{ik} = 1000 \times \frac{X_{ik} - M_{ik}}{X_{kw} + M_{kw}}$$

Jamaica was found to enjoy a comparative advantage of varying

degrees in all 31 markets, covering 23 product lines and following ten countries: (i) Canada; (ii) China; (iii) Columbia; (iv) France, (v) China; (vi) India, (vii) Korea Republic; (viii) other Asia, not elsewhere specified (nes); (ix) United Kingdom; and (x) United States. Jamaica can expand its exports by a minimum of US\$90 million per year by augmenting and focusing on these 23 product lines in the 39 export destinations and ten countries.

Table A Identification of Jamaica's new products for export

Sr. No.	Product code	Product description	Largest importers / potential markets	Weak competitors	Min. market potential (US\$ 000s)
1	70960	Fruits of the genera Capsicum/Pimenta, fresh/chilled	USA	•Belgium	846
2	70990	Vegetables, not elsewhere specified in 07.01–07.09, fresh/chilled	Canada+USA+UK	•Japan (Canada) •China (US) •China, Poland (UK)	210+1,526+900=2,636
3	90112	Coffee, not roasted, decaffeinated	USA	•Israel, Kenya	1,515
4	91099	Spices, not elsewhere specified in Ch. 9	USA+Canada+UK	•Costa Rica, Croatia, Germany, Japan, Pakistan, Thailand (US) •Germany (Canada) •Austria, China, Germany, Israel, Italy, Pakistan, Portugal (UK)	9,880+234+2,731=12,845
5	121190	Plants and parts of plants, incl. seeds and fruits, of a kind (excl. of 1211.20–1211.40) used primarily in perfumery/pharmacy/for insecticidal/fungicidal/similar purposes, fresh/dried, whether/not cut/crushed/powdered	France+USA+Canada	•Austria, Cote d'Ivoire, Denmark, Ghana, Portugal, Switzerland, Uganda (France) •Azerbaijan, Hungary, Japan, New Zealand, Singapore (US) •Brazil, Sri Lanka (Canada)	1,912+1,111+392=3,415
6	190120	Mixes and doughs for the preparation of bakers' wares of 19.05	UK+USA	•Poland, Spain (UK) •Brazil, Japan, UK (US)	2,831+1,009=3,840
7	190410	Prepared foods obt. by the swelling/roasting of cereals/cereal products	UK	•Canada, Denmark, Switzerland	3,833
8	200599	Vegetables and mixtures of vegetables (excl. of 2005.10–2005.91), prepared/preserved other than by vinegar/acetic acid, not frozen, other than products of heading 20.06	UK	•Denmark	569
9	210111	Extracts, essences and concentrates of coffee	USA	•Canada, China, Egypt, Arab Rep., Greece, Israel, Japan, Poland	14,903
10	210320	Tomato ketchup and other tomato sauces	USA	•Israel	236

11	230230	Bran, sharps and other residues, whether/not in the form of pellets, derived from the sifting/milling/other working of wheat	USA	USA	•Canada	7,866
12	251710	Pebbles/gravel/broken/crushed stone, of a kind commonly used for concrete aggregates/road metalling/railway/other ballast, shingle and flint, whether/not heat-treated	USA	USA	•China, France, Italy	2,867
13	252010	Gypsum; anhydrite	Colombia	Colombia	•Canada, Mexico, USA	2,419
14	330129	Essential oils other than those of citrus fruit (excl. of 3301.24 and 3301.25)	USA	USA	•Singapore	1,731
15	330210	Mixtures of odoriferous substance and mixtures (incl. alcoholic solutions) with a basis of one/more of these substance, of a kind used in the food/drink industries	USA	USA	•Austria, Costa Rica, Hungary, Korea, Rep., Madagascar, New Zealand, Peru, Poland	2,250
16	340119	Soap and organic surface-active products and preparations, in the form of bars, cakes, moulded pieces/shapes, and paper, wadding, felt and nonwovens, impregnated, coated/covered with soap/detergent (excl. of 3401.11)	USA	USA	•Japan	186
17	391590	Waste, parings and scrap, of plastics not elsewhere specified in 39.15	China+India+USA	China+India+USA	•Colombia, Finland, Israel, Turkey (China) •Jordan, Maldives, Other Asia, nes, Sri Lanka, Sweden, Switzerland (India) •Ireland, Korea, Rep., Norway, Singapore (US)	3,646+987+980=5,613
18	470710	Recovered (waste and scrap) unbleached craft paper/paperboard/corrugated paper/paperboard	Other Asia, not elsewhere specified	Other Asia, not elsewhere specified	•Australia, Panama	1,687
19	711319	Articles of jewellery and parts thereof, of other precious metal (excl. silver), whether/not plated/clad with precious metal	USA	USA	•Austria, Colombia, Czech Republic	3,439
20	760200	Aluminium waste and scrap	Korea, Rep.+China+USA	Korea, Rep.+China+USA	•Greece (Korea Rep.) •Argentina, Latvia, Poland, Slovenia, Tanzania, Turkey (China) •Austria, China, Indonesia, Korea, Rep. (US)	976+2,119+1,406=4,501

(continued))

Table A Identification of Jamaica's new products for export (continued)

Sr. No.	Product code	Product description	Largest importers / potential markets	Weak competitors	Min. market potential (US\$ 000s)
21	853710	Boards, panels, consoles, desks, cabinets and other bases, equipped with 2/more apparatus of 85.35/85.36, for electric control/distribution of electricity, incl. Those incorporating instruments/apparatus of Ch. 90 and numerical control apparatus, other than	USA	<ul style="list-style-type: none"> •Argentina, Costa Rica, New Zealand, South Africa, Turkey 	7,545
22	940540	Electric lamps and lighting fittings, not elsewhere specified in 94.05	USA+Canada	<ul style="list-style-type: none"> •Colombia, Hungary, Norway, Portugal, Romania, Slovak Republic, Turkey, Ukraine (US) •Finland, India, Norway, Sweden, Switzerland, Thailand, Vietnam (Canada) 	3,039+1,859=4,898
23	970110	Paintings, drawings and pastels, executed entirely by hand (excl. drawings of 49.06 and other than hand-painted/hand-decorated manufactured articles)	USA	<ul style="list-style-type: none"> •Sri Lanka 	191
		Total			89,833

Note: (i) * Weak competitors are those which do not do better than Jamaica in BRCA+ at least one of the other two (CTB and POS) indicators of competitiveness; ii) The respective potential market of Jamaica's competitors is shown in brackets; iii) Weak competitors are arranged in descending order of their exports in potential markets.

Annex B Identification of new markets for Jamaica

While attempting to expand and diversify the list of products in its export basket, it is also important that Jamaica explores new markets for its relatively better-established products. Well-established products could be those which already constitute significant exports for Jamaica. In the present study, any product with an export value of more than US\$2 million per annum was considered to be one of Jamaica's established products. Following these criteria, 29 products were identified.

Thereafter, the top-five importers in the world for each of Jamaica's established products (29) were identified. In a few cases, however, data were available for either fewer countries or none. To be able to export to these top markets, it is important that Jamaica enjoys competitiveness in each potential market.

To assess and compare the competitiveness of Jamaica, up to five top competitors were identified in each of the top markets for the 29 products. The following four criteria were applied to assess competitiveness: (1) unit cost; (ii) revealed comparative advantage; (iii) contribution to trade balance (CTB); and (iv) market position (POS). To be competitive in a market, it was considered important that Jamaica had a unit cost lower than one of its top competitors and performed better in at least two of the three other measures of competitiveness.

Unit price of imports¹

For Jamaica to be competitive in a market, it is important that the import price of a product from Jamaica is lower than that from its competitor/s. The unit price of imports for each potential competitor is measured by dividing the

import volume in US dollars (US\$) by the corresponding import quantity in each market.

The challenge here was to obtain the unit price of imports from Jamaica, as in most cases Jamaica has not been exporting any volume of the products under review. In such cases, an indirect method was followed to arrive at the unit price of import from Jamaica in each market.

To calculate the unit price of import from Jamaica, the export price from Jamaica to the world for each of the 29 product lines was calculated. Then the component associated with trade costs was added to this to approximate the import price from Jamaica. Trade costs should ideally have been calculated using the ratio of CIF (cost, insurance and freight) to FOB (free on board) for each product in a given market. However, the calculation of this ratio using UN COMTRADE data produced inconsistent results. Rather, an aggregate estimate of this ratio calculated by *CEPII*² (2008) was used.

According to *CEPII*, CIF/FOB touches the upper limit of 1.42 in majority cases. To maximise the chances of a market being competitive for Jamaica in a particular line, the upper limit was applied in most of the cases for countries situated far from Jamaica. While a CIF/FIB ratio of 1.3 was applied for Jamaica's neighbouring countries and European countries, in other cases a ratio of 1.42 was used.

Revealed comparative advantage

Revealed comparative advantage (RCA), proposed by Balassa (1965), denotes the ratio of a country's export of a specific commodity in its overall exports to the share of the commodity in total world exports at a given point in time. A nation's comparative advantage in a certain product is said

to be 'revealed' if it has an $RCA > 1$. It can also be used to make cross-country comparisons. If a country has a greater RCA than its competitor, it will have a higher comparative advantage and vice-versa. Despite reservations, RCA is extensively used in applied research as an indicator for measuring/ comparing the relative advantage of a country in export of a product.

Algebraically, it can be written as:

$$RCA_{ik} = \frac{X_k^i / \sum_k X_k^i}{\sum_i X_k^i / \sum_i \sum_k X_k^i}$$

Where, i = country, k = commodity, X = export.

To qualify as a competitor in a market, Jamaica is expected to have a lower unit price than its competitor/s and to do better than them in terms of RCA . Additionally, it is expected to satisfy at least one of the remaining two criteria (CTB and POS) to qualify as a competitor in a market.

After identifying 29 potential new markets for Jamaica, the authors

excluded those which constituted less than US\$5 million of potential market size for Jamaica. As a result, the list of potential new markets was reduced to 23. These 23 new markets constituted more than US\$57 billion in terms of global market value for top importers. Of these, Jamaica was found to be competitive in markets with a potential export value of US\$9.7 billion, where it is currently exporting currently exporting products to a value of only US\$0.8 billion. Depending upon its supply-side flexibility, Jamaica has the capacity to capture a much larger market share than that being exploited at present.

Notes

- 1 The definition of CTB and POS is provided in the previous section.
- 2 Gaulier, G, D Mirza, S Turban and S Zignago (2008), 'International Transportation Costs Around the World: A New CIF/FoB rates Dataset' CEPII, March, France.

Table B Identification of new markets for Jamaica

Sr. No.	Product code	Product description	Potential new markets	Import value (US\$ million)	Jamaica's competitive advantage	Potential market size (US\$ million)	Jamaica's exports to the world (US\$ million)
1	30619	Frozen crustaceans (excl. of 0306.11-0306.14); frozen flours/meals/pellets of crustaceans, fit for human consumption	Italy, Spain, USA, UK, Netherlands	287.9	<ul style="list-style-type: none"> Netherlands (Spain) Chile (USA) India, Ireland, China, Vietnam (UK) 	34	3
2	40690	Cheese (excl. of 0406.10-0406.40)	Germany, Russian Federation, Italy, UK, Belgium	8,486.7	<ul style="list-style-type: none"> Italy, Germany (UK) 	230	5.8
3	110100	Wheat/meslin flour	Netherlands, Brazil, Indonesia, France, USA	823.9	<ul style="list-style-type: none"> UK, Italy (Netherlands) Italy (France) Korea, Rep. (US) 	14	5
4	190190	Malt extract; food preparations of flour/groats/meal/starch/malt extract not containing cocoa/containing less than 40% by weight of cocoa calculated on a totally defatted basis, not elsewhere specified/incl.; food preparations of goods of headings 04.01 t	China, Japan, USA, Thailand, Nigeria	1,839.7	<ul style="list-style-type: none"> Netherlands, Malaysia (China) 	197	4
5	190531	Sweet biscuits	USA, France, Germany, UK, Belgium	2,756.8	<ul style="list-style-type: none"> UK (USA) Switzerland, Italy, France (Germany) France (UK) Switzerland, Italy, France (Belgium) 	287.5	2.5
6	190590	Bread, pastry, cakes, biscuits and other bakers' wares, whether/hot containing cocoa; communion wafers, empty cachets of a kind suitable for pharmaceutical use, sealing wafers, rice paper and similar products (excl. of 1905.10-1905.40)	USA, UK, Germany, France, Canada	7,244	<ul style="list-style-type: none"> Italy, France (USA) Belgium, Poland (UK) Switzerland, Italy (Germany) Belgium, Netherlands (France) USA, China, Mexico, Italy (Canada) 	1,494	9.9

(continued)

Table B Identification of new markets for Jamaica (continued)

Sr. No.	Product code	Product description	Potential new markets	Import value (US\$ million)	Jamaica's competitive advantage	Potential market size (US\$ million)	Jamaica's exports to the world (US\$ million)
7	200980	Juice of any single fruit/vegetable (excl. of 2009.11–2009.79), unfermented and not containing added spirit, whether/not containing added sugar/other sweetening matter	USA, Germany, Netherlands, Japan, France	1,155.7	<ul style="list-style-type: none"> • Brazil, Canada, Turkey (USA) • Poland, Netherlands, Austria, Italy, USA (Germany) • Poland, Germany, USA, Peru, Brazil (Netherlands) • USA, New Zealand, Poland, China, Chile (Japan) • Germany, Netherlands, Italy, Belgium (France) 	587	6.3
8	210390	Sauces and preparations therefor, not elsewhere specified; mixed condiments and mixed seasonings, not elsewhere specified	France, Germany, Netherlands, Nigeria, Japan	1,686.7	<ul style="list-style-type: none"> • USA, UK (Nigeria) 	147.6	15.5
9	210690	Food preparations, not elsewhere specified	Germany, Canada, Australia, Netherlands, Japan	6,203	<ul style="list-style-type: none"> • Mexico, China (Canada) • UK (Netherlands) 	211	4
10	220210	Waters, incl. mineral waters and aerated waters, containing added sugar/other sweetening matter/ flavoured	Belgium, Germany, France, Netherlands, Canada	2,297	<ul style="list-style-type: none"> • Ireland (France) 	23.5	3
11	220290	Non-alcoholic beverages other than waters of 2202.10 (not incl. fruit/vegetable juices of 20.09)	Germany, Netherlands, France, Spain, Hong Kong, China	1,570	<ul style="list-style-type: none"> • USA, UK (Netherlands) • USA (Hong Kong, China) 	65	6
12	220300	Beer made from malt	France, Italy, Germany, Netherlands, Belgium	2,578	<ul style="list-style-type: none"> • Portugal, Ireland (France) • Denmark (Italy) • Ireland (Germany) • Poland (Netherlands) 	142	15.9
13	220510	Vermouth and other wine of fresh grapes flavoured with plants/aromatic substance, in containers of 2 l/less	Russian Fed., Belgium, France, USA, Germany	319.5	<ul style="list-style-type: none"> • UK (France) • Italy, France, Japan, Australia (USA) 	36	5.5

14	220840	Rum and tafia	Spain, Russian Fed., Italy, France, UK	691	194	49.6
15	230990	Preparations of a kind used in animal feeding other than dog/cat food put up for RS	Germany, Netherlands, Belgium, Russian Fed., USA	3,421	1,051	10.4
16	252100	Limestone flux; limestone and other calcareous stone, of a kind used for the manufacture of lime/cement	India, Japan, Korea, Rep., Germany, Netherlands	402.5	100	2
17	252310	Cement clinkers	Ghana, Sri Lanka, Malaysia, Brazil, Saudi Arabia	826	31.9	9.6
18	260600	Aluminium ores and concentrates	China, Ireland, Spain, Ukraine, Germany	3,331	155	130
19	281820	Aluminium oxide (excl. artificial corundum)	Norway, Iceland, South Africa, India, Qatar	2,445	541.9	522.7

(continued))

Table B Identification of new markets for Jamaica (continued)

Sr. No.	Product code	Product description	Potential new markets	Import value (US\$ million)	Jamaica's competitive advantage	Potential market size (US\$ million)	Jamaica's exports to the world (US\$ million)
20	281830	Aluminium hydroxide	Japan, Korea, Rep., Netherlands, Italy, Germany	552	<ul style="list-style-type: none"> USA (Japan) China, USA (Korea Rep.) Spain, Ireland, Belgium, Australia, USA (Netherlands) Hungary, Netherlands (Italy) Netherlands, Hungary (Germany) 	188.5	6.8
21	380893	Herbicides, anti-sprouting products and plant-growth regulators, put up in forms/packing for retail sale/as preparations/articles	France, Canada, Germany, Brazil, Australia	3,462.5	<ul style="list-style-type: none"> Italy (France) UK (Canada) UK (Germany) South Africa (Brazil) New Zealand (Australia) 	326.8	2
22	711291	Waste and scrap of gold, incl. metal clad with gold but excl. sweepings containing other precious metals	Germany, Hong Kong, China, Canada, Spain, Switzerland	4,259	<ul style="list-style-type: none"> Switzerland, France, USA, Sweden, Denmark (Germany) Japan, South Africa, China, Singapore, Thailand (Hong Kong, China) USA, UK, Mexico, Peru (Canada) France, UK, Netherlands, Portugal, Italy (Spain) Italy, Spain, France, Hong Kong, China (Switzerland) 	3,540.6	13
23	720410	Waste and scrap of cast iron	Netherlands, Thailand, Malaysia, Germany, Spain	641	<ul style="list-style-type: none"> France, Belgium, Italy, UK, Spain (Netherlands) USA, Australia, New Zealand (Thailand) 	149	10
Total				57,280		9,747	842.5
						> 5 million	> 2 million

Note: i) Jamaica's weak competitors in potential new markets are shown under Jamaica's competitive advantage; ii) The respective potential market of Jamaica's competitors is shown in brackets; iii) In a few markets, there are no weak competitors; iv) Weak competitors are arranged in descending order of their exports in potential markets.

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