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## **JAMAICA**

### **AGROINDUSTRY IN A CHANGING GLOBAL ENVIRONMENT: INTERNATIONAL INSERTION AND SPECIALIZATION, COMPETITIVENESS AND MARKET OPPORTUNITIES**

This document was prepared by Martine Dirven, Pedro Tejo and Frank Vogelgesang of the Agricultural Development Unit, Division of Production, Productivity and Management, ECLAC, based on a study by Graciela Gutman and Luis Miotti, consultants of the Agricultural Development Unit, within the framework of the project "Promotion of the economic and social integration of small and medium- scale farmers into agro-industry", under the cooperation agreement between the Economic Commission for Latin America and the Caribbean (ECLAC), the Food and Agriculture Organization of the United Nations (FAO) and the Government of Germany through the German Agency for Technical Cooperation (GTZ). The opinions expressed in this document, that has not undergone formal editing, are those of the authors and do not necessarily reflect the views of the Organization.

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### **Abstract**

This document examines the evolution and potential of Jamaican foreign trade in agricultural and agroindustrial products with respect to the markets of the developed countries pertaining to the Organization of Economic Cooperation and Development (OECD).

The analysis is done on the basis of OECD and United Nations statistics over a period of thirty years, concentrating on three particularly important aspects: trade specialization, internationalization and the evolution of competitiveness. In order to measure the latter, various indicators were constructed on the basis of contributions to the trade balance or "Revealed Comparative Advantages". The analysis leads to the identification of so-called strong points for the exports of Jamaican agricultural and agroindustrial products which are then checked against the so-called weak points of the OECD countries in order to determine present export possibilities and how well potential markets have been taken advantage off.

## **A. SUMMARY OF CONCEPTS**

### **1. Specialization and competitiveness: two different concepts**

For many years, specialization and competitiveness were used interchangeably, because, following the traditional theory of international trade, if trade follows from comparative advantages, then exports have to be competitive. Thus, specialization became an indicator of competitiveness.

In the present document, the concepts will be differentiated. Thus, **competitiveness will be measured between countries for a given product**, while **comparative advantages will be measured among products for a given country**. Competitiveness will fluctuate along with macroeconomic variations (especially with the real exchange rate) while comparative advantages are of a more structural nature. The static analysis of comparative advantages is however replaced by a more dynamic vision of specialization in which new sources of specialization can be created and in which nations may foster or attract innovations that, in turn, can change the relative competitive positions of countries. Thus, in addition to the favourable endowment of natural resources, low relative costs due to a choice of products and processes in line with relative factor abundance, low relative costs induced by productivity enhancing innovations, monopoly situations derived from new product creation, etc., are also taken into account.

The strong macroeconomic oscillations and the instability of the exchange rates over the last decades have disturbed the competitiveness of exports considerably. Therefore, an analysis in terms of competitiveness only, is insufficient. It has to be complemented by a measure of **revealed comparative advantages**, that is, as they are "revealed" by international trade whatever their underlying reasons. For instance, take four products ranked 1, 2, 3, 4 as per their comparative advantages. At the real exchange rate, products 1 and 2 are competitive on the international market. With an exchange rate above the real exchange rate, product 2 may become uncompetitive, while with an exchange rate below the real exchange rate, product 3 may become competitive. The more marked the comparative advantages are, the less vulnerable the products will be to fluctuations in the exchange rate.

### **2. Methodology used**

The methodology used in this document, provides an analytical framework to study the long-term evolution of the international insertion of selected countries and products. In particular it identifies potential trade opportunities.

This methodology was already used in a previous study entitled "Latin America: international specialization and competitiveness, 1960-1991" <sup>1</sup> and made it possible to construct an original data base, "CTP-Data" (Competitive Trade Performance). The data base draws on international trade statistics from the OECD and different United Nations agencies. It integrates and develops recent research on competitiveness and specialization, in particular that of G. Lafay (CEPII, France) and P. Guerrieri (University of Rome).

The present study looks specifically at two main subjects related to Jamaica's insertion in the OECD markets:

- evolution of Jamaica's **specialization** profile regarding its trade with OECD for agricultural and agroindustrial goods defined at three, four and five digits of the Standard International Trade Classification (SITC, Rev. 2);
- evolution of the **competitiveness of these exports in the OECD markets**, with special emphasis on the identification of trade opportunities in selected OECD countries.

The indicators give a first quantitative approximation at high levels of disaggregation on the following subjects:

- Which have been the major changes in the profile of agricultural specialization in Jamaica? (indicator of comparative advantages or contribution to the balance)
- Are the changes in Jamaican exports oriented towards products with highly dynamic markets in the industrialized countries?
- To what degree does Jamaica's supply adapt to OECD countries' demand? (intersection of Jamaica's "strong points" with the "weak points" of selected OECD countries)
- Are there insufficiently exploited trade opportunities?

Two relevant aspects differentiate this methodology from other traditional studies based on the evolution of exports by target markets:

i) the indicator used for the study of international specialization of a country, representing the **revealed comparative advantages** (RCA), is not based exclusively on exports (like, for example, the indicator proposed by Bela Balassa), but on

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<sup>1</sup> Study prepared for LAES (Latin American Economic System) by Luis Miotti, Graciela Gutman, José Mourelle and Carlos Winograd and financed by the European Union. It consists of an analysis of the international specialization of 20 Latin American countries and 234 products -at three digits of the Standard International Trade Classification- *vis-à-vis* the OECD and the trade opportunities with each of the countries of the European Union.

a theory of contribution to the trade balance, taking into account, at the same time, the exports and imports of each product.

ii) the identification of present and potential markets based on the identification of the "strong points" in international trade (of exporting countries, in this case, Jamaica) which represent their long-term structural trade advantages. These "strong points" are related to the "weak points" of the countries to which these exports are destined (in this case, selected OECD countries). The "weak points" describe the products in which these countries have structural deficits. The joint analysis of "strong points" of each exporting country and "weak points" of each importing country, allows the identification of the potential export markets, with the following remarks in mind:

- the "strong points" and the "weak points" of each country vary over the years in accordance with the evolution of their areas of specialization;
- the structure of the products that arises from the analysis for each of the target markets, does not necessarily coincide with the real structure of exports. It can occur, and in fact it does, that products that contribute significantly (or even principally) to the total of agricultural exports in a given country, do not appear in the list. This occurs in cases where these products are not real "weak points" of the target country (even though they are "strong points" of the exporting countries), but are nevertheless imported by the target country. These cases are frequent when countries which are structurally surplus countries in given agricultural products, become importers for various reasons linked to aspects of primary production (natural disasters, for example), or because of regulatory policies (like the recomposition of stocks).

## **B. ANALYSIS**

### **1. Concentration of foreign trade**

#### **a) *Indicator***

A country's foreign trade diversification can be measured in terms of geographic or product concentration. Usually, a country's degree of geographic concentration as to its exports is similar to that of its imports.

The concentration of exports usually varies with:

- a country's development level: the more developed an economy, the more diversified its trade partners are likely to be;
- geographic proximity to a trade pole: the nearer to a trade pole, the more there will be a tendency to concentrate the country's trade towards that pole;



- size of the economy: the smaller a country's economy, the fewer possibilities it will have to produce to a great scale for a large number of trade partners.

b) **Presentation of results in the case of Jamaica**

In terms of the thirteen countries of Latin America and the Caribbean contained in table 1, Jamaica is a medium to small exporter of agricultural products (an average of US\$ 290 million in the 1991/93 period).<sup>2</sup> The agricultural exports growth rate has been modest (3.3% annually over the 1963/1993 period) although, contrary to all other countries except Peru, it was higher in the eighties and early nineties than in the 1963/79 period.

Table 1

LATIN AMERICA AND THE CARIBBEAN, 1963-1993: EVOLUTION OF THE AGRICULTURAL PRODUCTS EXPORTS TO THE ORGANIZATION OF ECONOMIC COOPERATION FOR DEVELOPMENT (OECD)

	Total agricultural exports (Millions of US dollars)			
	1963- 1965	1991- 1993	1993/1963 y.g.r.a/ (%)	1993/1979 y.g.r.a/ (%)
Barbados	39.00	41.00	0.18	-1.85
Brazil	1 060.67	7 591.72	7.28	1.18
Colombia	410.86	2 710.59	6.97	0.32
Costa Rica	90.59	1 378.13	10.21	5.08
Dominican Republic	151.95	460.19	4.04	-2.07
Ecuador	187.68	1 870.12	8.56	7.40
El Salvador	183.98	302.18	1.79	-6.93
Guatemala	151.3	867.18	6.43	0.03
Guyana	48.46	173.25	4.66	0.80
Honduras	71.52	729.70	8.65	0.73
Jamaica	116.58	289.63	3.30	4.90
Paraguay	32.09	312.04	8.46	-0.43
Peru	313.68	568.07	2.14	2.58

Source: Gutman and Mioti, 1996, p. 23 on the basis of Comparative Trade Performance Data Base (CTP-DATA).

a/ y.g.r. = yearly growth rate.

<sup>2</sup> In this study, the term "agricultural" will be used -in both text and tables- to embrace agricultural and livestock products, whether they have been subject to an agroindustrial process or not, unless otherwise specifically indicated.

Quite a number of countries in the region have a high geographical concentration of their agricultural exports with one single trade partner. For the 1991/93 period, of the thirteen countries contained in table 1, the Dominican Republic, Ecuador, El Salvador, Guatemala and Honduras all concentrated 50% or more of their agricultural exports with the United States, while Barbados, Guyana and Jamaica concentrated more than 50% of their agricultural exports with the United Kingdom. Jamaica has slightly diversified the destiny of its agricultural produce over the 1963/93 period. Thus, the United Kingdom was recipient of 69% of Jamaica's agricultural exports in 1963/65 and 60% in 1991/93. The United States comes in the second place with 21% of Jamaican agricultural products being exported to that country in 1991/93. Canada was the third partner in 1963/65 but was replaced by Japan in 1991/93 and Germany comes fifth with less than 3% of Jamaica's exports.

Table 2

JAMAICA: DESTINATION OF AGRICULTURAL EXPORTS TO OECD COUNTRIES,  
1963/1965-1991/1993

*(In percentages and thousands of US dollars)*

	1963/ 1965	1973/ 1975	1979/ 1981	1984/ 1986	1988/ 1990	1991/ 1993
United States	14.86%	24.55%	25.24%	34.09%	23.10%	20.59%
Japan	0.25%	3.04%	3.35%	5.18%	5.11%	6.62%
European Union (EU)	73.15%	65.38%	60.92%	51.75%	64.88%	65.74%
France	0.02%	0.23%	1.44%	0.22%	0.18%	0.35%
Germany	1.75%	1.81%	3.61%	2.54%	2.63%	2.57%
Italy	0.44%	0.16%	0.27%	0.28%	0.27%	0.83%
Netherlands	0.20%	0.52%	1.26%	0.94%	0.82%	0.85%
Spain	0.01%	0.12%	0.33%	0.60%	0.60%	0.14%
Sweden	0.52%	0.53%	0.40%	0.41%	0.33%	0.25%
United Kingdom	68.60%	60.98%	51.50%	44.61%	58.79%	59.67%
Rest of EU	1.61%	1.04%	2.12%	2.15%	1.26%	1.08%
Australia	0.19%	0.97%	1.45%	0.59%	0.20%	0.13%
Canada	10.88%	5.02%	6.45%	6.13%	5.27%	5.52%
New Zealand	0.41%	0.84%	2.26%	1.91%	1.18%	1.07%
Rest of OECD	0.26%	0.19%	0.33%	0.37%	0.27%	0.33%
OECD	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
In value terms	116 561	135 911	163 108	169 985	224 442	289 632

Source: Gutman and Mioti, on the basis of Comparative Trade Performance Data Base (CTP-DATA).

## 2. Indicator of the contribution to the trade balance (ICTB)

### a) *Indicator*

The indicator of revealed comparative advantage in the concept of "contribution to the trade balance" (ICTB) <sup>3</sup> is derived from the uniform distribution of the overall trade balance of a country prorated at the respective weights of the different products or product categories (theoretical balance). The aim is to compare the trade balance observed for each product or product category with the theoretical trade balance. There will be revealed comparative advantages (disadvantages) if the observed trade balance over a given period of time is above (below) the theoretical trade balance.

The indicator of contribution to the trade balance for a country 'j' and for a product or group of products 'i' is defined as follows:

$$\begin{aligned} ICTB_{ij} &= \left[ \frac{(X_i - M_i)}{(X+M)/2} - \frac{(X-M)}{(X+M)/2} \times \frac{(X_i + M_i)}{X+M} \right] \times 100 \\ &= \frac{100}{(X+M)/2} \left[ (X_i - M_i) - (X-M) \frac{X_i + M_i}{X+M} \right] \end{aligned}$$

In the second expression, the first variable in parenthesis represents the observed commercial balance while the second stands for the theoretical balance.  $ICTB_{ij} > 0$  constitutes the case of revealed comparative advantages, whereas  $ICTB_{ij} < 0$  shows a disadvantage. In general, it holds that the smaller the value of the indicator of the contribution to the trade balance (ICTB or revealed comparative advantages), the greater its variability. This would indicate, *a priori*, a non-consolidated advantage.

### b) *Presentation of results in the case of Jamaica*

Over time, Jamaica has increased the number of agricultural products with revealed comparative advantages (RCA) to 26. This is lower than the number of RCA's of most of the other countries of the Latin American and Caribbean region but above the number of RCA's of Guyana and Barbados. Table 3 shows the first twelve, together with other information, while table 4 shows the 26 products with RCA and their evolution over different subperiods between 1963/65 and 1988/91. It has to be noted that except for the first three, most ICTB have low values and therefore have to be interpreted with care.

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<sup>3</sup> In this study, the indicator of contribution to the balance is calculated following P. Guerrieri (1992).

### 3. Market dynamism

#### a) *Indicator*

OECD imports of all products grew at 8.21% and those of agricultural products grew at 6.88% over the 1983/91 period. In order to study market dynamism, the agricultural products have been classified into five sub-groups: 1) very dynamic markets (annual growth rates of more than 13%), 2) dynamic markets (growth rates of 8% to 13%), 3) intermediate dynamic markets (growth rates of 6% to 8%), 4) stagnating markets (growth rates of 0% to 6%) and 5) markets in decline (negative growth rates).<sup>4</sup>

The growth rate of imports is used as a "proxy" indicator for the changes in demand, which in turn derive from changes in consumption patterns and habits taking place in the industrialized countries (resulting from, among other things, a rise in income; a growing conscience of the nutritional value and safety of foods; the processes of urbanization and the social and demographic changes that go with it, and growing influence of demand and consumer preferences in the decision-making process of agricultural producers).

Growth rates have been calculated in current US\$ dollars so that they underestimate the growth of products with a lower than average price increase and overestimate the growth rate of those with a higher than average price increase.

#### b) *Presentation of results in the case of Jamaica*

None of the products for which Jamaica shows main revealed advantages belongs to the category of "very dynamic markets", but half belong to "dynamic OECD import markets" with an annual cumulative growth rate of 8% to 13% which is above the average dynamism of all OECD imports. In turn, a fourth of the products pertain to stagnating or declining markets (see table 3).

### 4. Classification of revealed comparative advantages

#### a) *Indicator*

The RCA's have been classified following, on the one hand, the value of the ICTB (greater than 2, between 2 and 1 and smaller than one) and, on the other, on their historic trend over the 30 year span of the study <sup>5</sup> (increasing, decreasing or irregular). Thus they are divided as follows:

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<sup>4</sup> A list of most agricultural and agroindustrial products ranked by decreasing dynamism can be found in annex.

<sup>5</sup> The trend coefficient is calculated through a conventional least square method.

- A: historic advantages, with values greater than 2 and increasing trend;
- B: historic advantages, with values greater than 2 but decreasing trend;
- C: new advantages, with values between 2 and 1;
- D: recently emerging advantages, with positive but smaller than 1 values or of small values and irregular trend.

In most countries the traditional RCA's have shown a declining trend, while at the same time, as of the early eighties, new, emerging RCA's have appeared, which are still fragile. Their combined weight in the export structure of each country is still small, but they are generally oriented towards dynamic markets. In other words, all countries have shown a restructuring of their agricultural specialization, still incipient in most, but well oriented towards a greater adaptation to the evolution and new requirements of the demand in the countries of destination.

**b) *Presentation of results in the case of Jamaica***

Of the 12 products with highest RCA contained in table 3, only one pertains to the "A" classification of historic RCA's with an increasing trend, most are classified as recently emerging ("D") and the rest as historic RCA's but with declining trend or "B" (one of which had a value of less than 2 in the 1989/91 period).

The percentage wise participation of each agricultural product in the total of agricultural products exported by Jamaica to the OECD over different subperiods within the 1963/93 total period, by decreasing order of importance in the last subperiod 1991/93 is shown in table 1 of the Annex. It thus permits to see the evolution over time of the participation of different products in the overall agricultural exports of Jamaica. Raw sugar for instance has decreased its importance from 56% to 31% in overall agricultural exports from Jamaica to the OECD, while the importance of bananas has had a downward and then upward trend to finish the 1991/93 period more or less where it started in 1963/65. Lots of products (nearly 40% of the product groups reported in the table) are exported in such small quantities that their percent wise participate is near zero.

Table 3  
JAMAICA: MAIN REVEALED COMPARATIVE ADVANTAGES (RCA)  
AND THEIR EXPORTS TO THE OECD  
(Indicator of contribution to the trade balance)

Product groups <sup>a/</sup>	RCA (1)	Type of RCA (2)	Exports (percentage over total agriculture)		Market dynamism (3)
			1991- 1993	1963- 1965	
0611 Sugars, beet and cane, raw, solid	6.6945	B	31.1	55.9	3
0573 Bananas (including plantains), fresh or dried	3.7528	B	21.1	24.0	2
1124 Spirits (other than those of heading 512.16); liqueurs and other spirituous beverages, nesb/; compound alcoholic preparations (known as "concentrated extracts") for the manufacture of beverages	3.7109	A	16.1	5.3	2
0548 Vegetable products, roots and tubers, chiefly for human food, nesb/, fresh or dried	0.9898	D	4.7	0.0	4
0710 Coffee and coffee substitutes	0.8728	D	6.7	0.7	5
1220 Tobacco, manufactured	0.5058	D	1.9	1	2
1123 Beer made from malt (including ale, stout and porter)	0.3385	D	2.1	0.1	2
0571 Oranges, mandarins, clementines and other similar citrus hybrids, fresh or dried	0.3261	D	1.4	0.4	3
0750 Spices	0.3191	B	1.6	2.4	3
0360 Crustaceans and molluscs, whether in shell or not, fresh (live or dead) chilled, frozen, salted, in brine or dried; crustaceans, in shell, simply boiled in water	0.2962	D	2.3	0.1	2
0589 Fruits otherwise prepared or preserved, nesb/, whether or not containing added sugar or spirit	0.2062	D	1.1	2.5	2
0720 Cocoa	0.2013	D	1.1	0.7	4
Period's total number of RCA's; exports subtotal	26		91.2	93.1	

Source: Gutman and Mioti, 1996, p. 37 on the basis of the Comparative Trade Performance Data Base (CTP-DATA).

Notes: (1) The RCA's are in decreasing order as per the indicator's (ICTB) value in 1989/91. (2) A: historic RCA, with stable or increasing trend; B: historic RCA with decreasing trend; C: new RCA; D: incipient RCA; \*: highly fluctuating RCA. (3) Yearly growth rates (y.g.r.) of OECD imports in the period 1981-1993: 1: very dynamic (y.g.r. > 13%); 2: dynamic (8% ≤ y.g.r. < 13%); 3: intermediate dynamism (6% ≤ y.g.r. < 8%); 4: stagnating (0% ≤ y.g.r. < 6%); 5: retrogressing (y.g.r. < 0%).

<sup>a/</sup> The numbers refer to the Standard International Trade Classification, Revision 2 (SITC, Rev. 2).  
<sup>b/</sup> nes = not elsewhere specified nor included.

Table 4  
JAMAICA, 1963-1991: REVEALED COMPARATIVE ADVANTAGES (RCA) OF EXPORTS TO THE OECD  
(Indicator of contribution to the trade balance)

SITC (Rev.2)	Product groups	1963/ 1965	1973/ 1975	1979/ 1981	1984/ 1986	1989/ 1991
0611	Sugars, beet and cane, raw, solid	23.9848	10.9396	6.0738	7.7041	6.6945
0573	Bananas (including plantains), fresh or dried	10.3136	4.6904	2.3704	1.4619	3.7528
1124	Spirits (other than those of heading 512.16); liqueurs and other spirituous beverages, nes; compound alcoholic preparations (known as "concentrated extracts") for the manufacture of beverages	1.9250	2.9932	4.4127	5.5150	3.7109
0548	Vegetable products, roots and tubers, chiefly for human food, nes, fresh or dried	(0.0074)	0.3035	0.3647	1.1702	0.9898
0710	Coffee and coffee substitutes	0.2985	0.5614	0.5576	1.3405	0.8728
1220	Tobacco, manufactured	0.2025	0.7268	1.0974	1.4326	0.5058
1123	Beer made from malt (including ale, stout and porter)	(0.0929)	(0.1153)	0.0043	0.2324	0.3385
0571	Oranges, mandarins, clementines and other similar citrus hybrids, fresh or dried	0.1613	0.0392	0.1051	0.2756	0.3261
0750	Spices	1.0170	0.7542	0.3082	0.6328	0.3191
0360	Crustaceans and molluscs, whether in shell or not, fresh (live or dead) chilled, frozen, salted, in brine or dried; crustaceans, in shell, simply boiled in water	0.0041	0.1284	0.0070	0.2192	0.2962
0589	Fruits otherwise prepared or preserved, nes, whether or not containing added sugar or spirit	0.9049	0.2446	0.2976	0.5770	0.2062
0720	Cocoa	0.3043	0.3085	0.6621	1.0765	0.2013
0545	Other fresh or chilled vegetables	(0.1964)	(0.0280)	0.1485	0.9030	0.1976
2927	Cut flowers and foliage	(0.0079)	0.0182	0.0581	0.1293	0.1378
05797	Avocados, mangoes, guavas and mangosteens, fresh or dried	0.0000	0.0000	0.0252	0.0641	0.1148
05798	Other fresh fruit	0.0000	0.0077	0.0075	0.4127	0.0911
0585	Fruit juices (including grape must) and vegetable juices, whether or not containing added sugar, but unfermented and not containing spirit	0.8049	0.1194	0.1001	0.3500	0.0720
0730	Chocolate and other food preparations containing cocoa, nes	(0.1902)	(0.0556)	0.0002	(0.0025)	0.0675
0572	Other citrus fruit, fresh or dried	0.2522	0.0830	0.0475	0.1215	0.0371

SITC (Rev.2)	Product groups	1963/ 1965	1973/ 1975	1979/ 1981	1984/ 1986	1989/ 1991
0586	Fruit, temporarily preserved	0.0038	0.0204	0.0055	0.0062	0.0245
1110	Non-alcoholic beverages, nes	(0.0393)	(0.0722)	(0.0019)	0.0171	0.0185
0583	Jams, fruit jellies, marmalades, fruit purée and fruit pastes, being cooked preparations, whether or not containing added sugar	0.0525	0.0450	0.0107	0.0137	0.0072
05482	Sugar beet, whole or sliced, fresh, dried or powdered; sugar cane	0.0000	0.0001	0.0013	0.0048	0.0009
0616	Natural honey	0.0334	0.0104	0.1461	0.0250	0.0001
05795	Pineapples, fresh or dried	0.0000	0.0000	0.0000	0.0026	0.0001
05796	Dates, fresh or dried	0.0000	0.0000	0.0000	0.0000	0.0000
	Number of revealed comparative advantages	15	19	24	24	26

Source: G. Gutman y L. Miotti, based on CTP-DATA.

Notes: a) The RCA's are in decreasing order as per the indicator's (ICTB) value in 1989/1991.  
b) An RCA of less than unit value is highly volatile and generally has an indefinite trend

## 5. Strong points and weak points

### a) *Indicator*

The so-called "strong points" in the foreign trade of a country (in this case, Jamaica with selected OECD countries) are represented by those products or groups of products for which the country has solid opportunities for expanding trade. They are those products to which the following conditions apply: i) positive revealed comparative advantage (or ICTB > 0) and ii) exports over imports greater than unit value (or X/M > 1).

On the other hand, the "weak points" are represented by those products with revealed comparative disadvantages (ICTB < 0) and a rate of exports over imports below unit value.

The tables which show the intersection of Jamaica's "strong points" with the "weak points" of the selected OECD countries, make up a list of products which indicate in which markets (products) of the respective OECD countries solid and structural (rather than aleatory and circumstantial) opportunities for trade insertion exist. This listing does not mean, as we indicated above, that those products are the ones actually being exported to said markets. Neither does it preclude the possibility that within the export structure of a country to said markets products are found that are not part of the list.

### b) *Presentation of results in the case of Jamaica and selected OECD countries*

Table 5 shows the intersection of Jamaica's "strong points" with various OECD countries' "weak points" for the 26 agricultural products for which Jamaica shows positive revealed comparative advantages.



JAMAICA: INTERNATIONAL SPECIALIZATION  
INTERSECTION OF JAMAICAN "STRONG POINTS" WITH OECD "WEAK POINTS", 1989/91

[illegible]

ISTC	Product groups	Canada	United States	Japan	Australia	New Zealand	Germany	Italy	France	United Kingdom	Netherlands	Sweden	Spain
036	Crustaceans and molluscs, whether in shell or not, fresh (live or dead) chilled, frozen, salted, in brine or dried; crustaceans, in shell, simply boiled in water		*	*			*	*	*			*	*
0589	Fruits otherwise prepared or preserved, nes, whether or not containing added sugar or spirit	*	*	*		*	*		*	*	*	*	
072	Cocoa	*	*	*	*	*	*	*	*	*		*	*
0545	Other fresh or chilled vegetables	*		*			*			*		*	
2927	Cut flowers and foliage	*	*	*			*		*	*		*	
05797	Avocados, mangoes, guavas and mangosteens, fresh or dried	*	*	*	*		*	*	*	*	*	*	
05798	Other fresh fruit	*	*	*			*		*	*	*	*	
0585	Fruit juices (including grape must) and vegetable juices, whether or not containing added sugar, but unfermented and not containing spirit	*	*	*			*		*	*	*	*	
073	Chocolate and other food preparations containing cocoa, nes	*		*					*				*
0572	Other citrus fruit, fresh or dried	*		*		*	*	*	*	*	*	*	

ISTC	Product groups	Canada	United States	Japan	Australia	New Zealand	Germany	Italy	France	United Kingdom	Netherlands	Sweden	Spain
0586	Fruits, temporarily preserved		*	*	*		*		*	*			
111	Non-alcoholic beverages, nes		*	*		*	*			*		*	*
0583	Jams, fruit jellies, marmalades, fruit purée and fruit pastes, being cooked preparations, whether or not containing added sugar	*	*	*	*		*					*	
05482	Sugar beet, whole or sliced, fresh, dried or powdered; sugar cane	*		*				*		*	*	*	*
0616	Natural honey		*	*			*	*	*	*	*	*	
05795	Pineapples, fresh or dried	*	*	*		*	*	*	*	*	*	*	*
05796	Dates, fresh or dried	*		*	*	*	*	*	*	*	*	*	*

Source: Gutman and Miotti, based on CTP-data.

Note: The asterisk (\*) shows these products for which : a) Jamaica has positive RCA's and greater exports than imports ( $X/M > 1$ ); and b) the country of the OCDE has negative RCA's and smaller exports than imports ( $X/M < 1$ ). The intersection however does not indicate that there is bilateral trade between the two countries but that there is a potential market at the level of aggregation used.

## **6. Exploitation of market opportunities**

### **a) *Indicator***

The criterion used here is the same as has been used in various European studies on the subject, namely: comparing the market share a country has in a given product and country with the market share it has for that same product in the OECD overall. If it is less than the share it reaches in the OECD overall, then this would be indicating that market opportunities have not been sufficiently exploited. In contrast, if it is greater, the market opportunities would have been well exploited.

Obviously, a better penetration of one country's exports into a given market depends on a series of factors which are beyond the scope of this paper (macroeconomic policies, exchange rates, etc; the possibilities to expand the exportable supply, trade regulations, strategy of the competitors, etc.). However, this criterion helps to get a first idea of potential markets and/or geographic reorientation of exports.

### **b) *Presentation of results in the case of Jamaica and selected OECD countries***

The intersection of Jamaica's "strong points" with OECD countries' "weak points" is taken a step further in tables 6, 7, 8, 9 and 10 for Jamaica's five major trading partners in agricultural products, namely the United Kingdom, the United States of America, Japan, Canada and Germany. For each product on an intersection, a comparison between Jamaica's total market share in the OECD and in the particular partner's market is made to see whether the market opportunities have been fully exploited or not. Clearly, the market opportunities in the United Kingdom have been well-exploited and those in the United States and Canada, too. In Germany and Japan, most opportunities remain ill-exploited or could -at first sight at least- be exploited further.

Table 6

MARKET OPPORTUNITIES  
JAMAICA/UNITED KINGDOM: 1991/93

OECD market share 1991/93 (%)	UK market share 1991/93 (%)	Unexploited market opportunities	Little exploited market opportunities	Well exploited market opportunities
3.42	10.20			Sugars, beet and cane, raw, solid
1.32	14.88			Bananas (including plantains), fresh or dried
0.80	7.53			Vegetable products, roots and tubers, chiefly for human food, nes, fresh or dried
0.49	0.71			Spices
0.44	3.79			Avocados, mangoes, guavas and mangosteens, fresh or dried
0.25	0.97			Other fresh fruit
0.25	0.08		Coffee and coffee substitutes	
0.23	0.42			Beer made from malt (including ale, stout and porter)
0.16	0.84			Sugar beet, whole or sliced, fresh, dried or powdered; sugar cane
0.15	0.82			Oranges, mandarins, clementines and other similar citrus hybrids, fresh or dried
0.10	0.47			Fruits otherwise prepared or preserved, nes, whether or not containing added sugar o spirit
0.09	0.10			Cocoa
0.06	0.11			Fruit juices (including grape must) and vegetable juices, whether or not containing added sugar, but unfermented and not containing spirit
0.05	0.24			Other citrus fruit, fresh or dried
0.04	0.06			Non-alcoholic beverages, nes
0.04	0.03		Cut flowers and foliage	
0.03	0.06			Other fresh or chilled vegetables
0.02	0.03			Fruit, temporarily preserved
0.00	0.02			Natural honey
0.00	0.00	Pineapples, fresh or dried		
0.00	0.00	Dates, fresh or dried		
0.12	0.78	Total exports		

Source: G. Gutman y L. Miotti, based on CTP-Data.

Note: The products correspond to the intersection "strong points-weak points" and are presented in decreasing order of their market share in the OECD in 1991/93.

Table 7  
MARKET OPPORTUNITIES - JAMAICA/UNITED STATES: 1991/93

OECD market share 1991/93 (%)	US market share 1991/93 (%)	Unexploited market opportunities	Little exploited market opportunities	Well exploited market opportunities
3.42	1.25		Sugars, beet and cane, raw, solid	
1.32	0.01		Bananas (including plantains), fresh or dried	
0.80	8.60			Vegetable products, roots and tubers, chiefly for human food, nes, fresh or dried
0.68	0.57		Spirits (other than those of heading 512.16); liqueurs and other spirituous beverages, nes; compound alcoholic preparations (known as "concentrated extracts:") for the manufacture of beverages	
0.49	0.48		Spices	
0.44	0.01		Avocados, mangoes, guavas and mangosteens, fresh or dried	
0.25	0.70			Other fresh fruit
0.25	0.11		Coffee and coffee substitutes	
0.23	0.43			Beer made from malt (including ale, stout and porter)
0.10	0.03		Fruits otherwise prepared or preserved, nes, whether or not containing added sugar or spirit	
0.09	0.04		Cocoa	
0.06	0.23			Crustaceans and molluscs, whether in shell or not, fresh (live or dead) chilled, frozen, salted, in brine or dried; crustaceans, in shell, simply boiled in water
0.06	0.09			Fruit juices (including grape must) and vegetable juices, whether or not containing added sugar, but unfermented and not containing spirit
0.04	0.33			Jams, fruit jellies, marmalades, fruit pure and fruit pastes, being cooked preparations, whether or not containing added sugar
0.04	0.16			Non-alcoholic beverages, nes
0.04	0.14			Cut flowers and foliage
0.02	0.00		Fruits, temporarily preserved	

OECD market share 1991/93 (%)	US market share 1991/93 (%)	Unexploited market opportunities	Little exploited market opportunities	Well exploited market opportunities
0.00	0.00	Natural honey		
0.00	0.00	Pineapples, fresh or dried		
0.12	0.00	Total exports		

**Source:**

G. Gutman y L. Miotti, based on CTP-Data.

**Notes:**

The products correspond to the intersection "strong points-weak points" and are presented in decreasing order of their market share in the OECD IN 1991/93.

Table 8  
MARKET OPPORTUNITIES - JAMAICA/JAPAN: 1991/93

OECD market share 1991/93 (%)	Japan market share 1991/93 (%)	Unexploited market opportunities	Little exploited market opportunities	Well exploited market opportunities
3.42	0.00	Sugars, beet and cane, raw, solid		
1.32	0.00	Bananas (including plantains), fresh or dried		
0.80	0.00	Vegetable products, roots and tubers, chiefly for human food, nes, fresh or dried		
0.68	0.21		Spirits (other than those of heading 512.16); liqueurs and other spirituous beverages, nes; compound alcoholic preparations (known as "concentrated extracts") for the manufacture of beverages	
0.49	0.19		Spices	
0.44	0.00	Avocados, mangoes, guavas and mangosteens, fresh or dried		
0.25	2.39			Coffee and coffee substitutes
0.25	0.00	Other fresh fruit		
0.23	0.08		Beer made from malt (including ale, stout and porter)	
0.16	0.00	Sugar beet, whole, sliced, fresh, dried or powdered; sugar cane		
0.15	0.00	Oranges, mandarins, clementines and other similar citrus hybrids, fresh or dried		
0.10	0.00	Fruits otherwise prepared or preserved, nes, whether or not containing added sugar o spirit		
0.10	0.00		Tobacco, manufactured	
0.09	0.72			Cocoa



OECD market share 1991/93 (%)	Japan market share 1991/93 (%)	Unexploited market opportunities	Little exploited market opportunities	Well exploited market opportunities
0.06	0.00	Fruit juices (including grape must) and vegetable juices, whether or not containing added sugar, but unfermented and not containing spirit		
0.06	0.00		Crustaceans and molluscs, whether in shell or not, fresh (live or dead) chilled, frozen, salted, in brine or dried; crustaceans, in shell, simply boiled in water	
0.05	0.00	Other citrus fruit, fresh or dried		
0.04	0.04			Cut flowers and foliages
0.04	0.00	Jams, fruit jellies, marmalades, fruit pure and fruit pastes, being cooked preparations, whether or not containing added sugar		
0.04	0.00	Non-alcoholic beverages, nes		
0.03	0.00	Other fresh or chilled vegetables		
0.02	0.00	Chocolate and other food preparations containing cocoa, nes		
0.02	0.00	Fruit, temporarily preserved		
0.00	0.00	Natural honey		
0.00	0.00	Pineapples, fresh or dried		
0.00	0.00	Dates, fresh or dried		
0.12	0.05	Total exports		

Source: G. Gutman y L. Miotti, based on CTP-Data.

Notes: The products correspond to the intersection "strong points-weak points" and are presented in decreasing order of their market share in the OECD in 1991/93.

Table 9

## MARKET OPPORTUNITIES - JAMAICA/CANADA: 1991/93

OECD market share 1991/93 (%)	Canada market share 1991/93 (%)	Unexploited market opportunities	Little exploited market opportunities	Well exploited market opportunities
3.42	0.00	Sugars, beet and cane, raw, solid		
1.32	0.00		Bananas (including plantains), fresh or dried	
0.80	13.02			Vegetable products, roots and tubers, chiefly for human food, nes, fresh or dried
0.49	1.02			Spices
0.44	0.60			Avocados, mangoes, guavas and mangosteens, fresh or dried
0.25	0.40			Other fresh fruit
0.25	0.06		Coffee and coffee substitutes	
0.16	9.27			Sugar beet, whole, sliced, fresh, dried or powdered; sugar cane
0.15	0.09		Oranges, mandarins, clementines and other similar citrus hybrids, fresh or dried	
0.10	1.38			Fruits otherwise prepared or preserved, nes, whether or not containing added sugar o spirit
0.09	0.00		Cocoa	
0.06	0.00		Fruit juices (including grape must) and vegetable juices, whether or not containing added sugar, but unfermented and not containing spirit	
0.05	0.00	Other citrus fruit, fresh or dried		
0.04	0.36			Cut flowers and foliage
0.04	0.17			Jams, fruit jellies, marmalades, fruit pure and fruit pastes, being cooked preparations, whether or not containing added sugar
0.03	0.11			Other fresh or chilled vegetables
0.02	0.15			Chocolate and other food preparations containing cocoa, nes

OECD market share 1991/93 (%)	Canada market share 1991/93 (%)	Unexploited market opportunities	Little exploited market opportunities	Well exploited market opportunities
0.00	0.00			Pineapples, fresh or dried
0.00	0.00	Dates, fresh or dried		
0.12	0.21	Total exports		

**Source:**

G. Gutman y L. Miotti, based on CTP-Data.

**Notes:**

The products correspond to the intersection "strong points-weak points" and are presented in decreasing order of their market share in the OECD in 1991/93.

Table 10

## MARKET OPPORTUNITIES - JAMAICA/GERMANY: 1991/93

OECD market share 1991/93 (%)	Germany market share 1991/93 (%)	Unexploited market opportunities	Little exploited market opportunities	Well exploited market opportunities
1.32	0.00	Bananas (including plantains), fresh or dried		
0.80	0.00	Vegetable products, roots and tubers, chiefly for human food, nes, fresh or dried		
0.68	0.78			Spirits (other than those of heading 512.16); liqueurs and other spirituous beverages, nes; compound alcoholic preparations (known as "concentrated extracts") for the manufacture of beverages
0.49	0.72			Spices
0.44	0.12		Avocados, mangoes, guavas and mangosteens, fresh or dried	
0.25	0.08		Other fresh fruit	
0.25	0.00		Coffee and coffee substitutes	
0.15	0.02		Oranges, mandarins, clementines and other similar citrus hybrids, fresh or dried	
0.10	0.00		Fruits otherwise prepared or preserved, nes, whether or not containing added sugar or spirit	
0.09	0.00		Cocoa	
0.06	0.05		Fruit juices (including grape must) and vegetable juices, whether or not containing added sugar, but unfermented and not containing spirit	
0.06	0.00		Crustaceans and molluscs, whether in shell or not, fresh (live or dead) chilled, frozen, salted, in brine or dried; crustaceans, in shell, simply boiled in water	
0.05	0.00		Other citrus fruit, fresh or dried	
0.04	0.02		Cut flowers and foliage	
0.04	0.00	Non-alcoholic beverages, nes		

OECD market share 1991/93 (%)	Germany market share 1991/93 (%)	Unexploited market opportunities	Little exploited market opportunities	Well exploited market opportunities
0.04	0.00	Jams, fruit jellies, marmalades, fruit pure and fruit pastes, being cooked preparations, whether or not containing added sugar		
0.03	0.00		Other fresh or chilled vegetables	
0.02	0.00	Fruits temporarily preserved		
0.00	0.00	Natural honey		
0.00	0.00			Pineapples, fresh or dried
0.00	0.00	Dates, fresh or dried		
0.12	0.02	Total exports		

Source:

G. Gutman y L. Miotti, based on CTP-Data.

Notes:

The products correspond to the intersection "strong points-weak points" and are presented in decreasing order of their market share in the OECD in 1991/93.

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## Annex

Table 1  
JAMAICA, 1963-93: EXPORTS TO THE OECD, BY PRODUCT GROUPS  
(Percentages of total agricultural exports)

SITC	Product groups	1963-1965	1973-1975	1979-1981	1984-1986	1988-1990	1991-1993
0611	Sugars, beet and cane, raw, solid	55.932	39.515	31.630	28.977	33.978	31.075
0573	Bananas (including plantains), fresh or dried	23.983	16.246	11.902	5.495	15.190	21.090
1124	Spirits (other than those of heading 512.16); liqueurs and other spirituous beverages, nes; compound alcoholic preparations (known as "concentrated extracts") for the manufacture of beverages	5.305	11.542	23.697	20.996	20.588	16.077
071	Coffee and coffee substitutes	0.709	2.056	3.017	5.074	4.530	6.762
0548	Vegetable products, roots and tubers, chiefly for human food, nes, fresh or dried	0.025	1.167	2.155	4.410	5.309	4.690
036	Crustaceans and molluscs, whether in shell or not, fresh (live or dead) chilled, frozen, salted, in brine or dried; crustaceans, in shell, simply boiled in water	0.104	0.574	0.066	0.883	0.953	2.280
1123	Beer made from malt (including ale, stout and porter)	0.059	0.011	0.147	1.013	1.884	2.083
122	Tobacco, manufactured	1.022	2.853	5.985	5.414	3.261	1.916
075	Spices	2.430	2.726	1.979	2.518	1.769	1.553
0571	Oranges, mandarins, clementines and other similar citrus hybrids, fresh or dried	0.379	0.158	0.576	1.020	1.820	1.432
05798	Other fresh fruit	0.000	0.030	0.041	1.511	0.252	1.383
098	Edible products and preparations, nes	0.104	0.245	0.610	1.280	1.012	1.362



SITC	Product groups	1963-1965	1973-1975	1979-1981	1984-1986	1988-1990	1991-1993
0589	Fruits otherwise prepared or preserved, nes, whether or not containing added sugar or spirit	2.486	1.357	1.746	2.226	1.040	1.137
072	Cocoa	0.724	1.483	3.538	4.026	1.677	1.104
048	Cereal preparations and preparations of flour or starch of fruits or vegetables	0.014	0.081	0.114	0.275	0.489	0.893
0585	Fruit juices (including grape must) and vegetable juices, whether or not containing added sugar, but unfermented and not containing spirit	2.240	0.812	0.987	1.744	0.991	0.844
0545	Other fresh or chilled vegetables	0.043	0.408	0.908	3.427	1.197	0.773
05797	Avocados, mangoes, guavas and mangosteens, fresh or dried	0.000	0.000	0.132	0.239	0.277	0.670
2927	Cut flowers and foliage	0.000	0.088	0.307	0.496	0.798	0.464
034	Fish, fresh (live or dead) chilled or frozen	0.000	0.003	0.102	0.180	0.281	0.419
056	Vegetables, roots and tubers, prepared or preserved, nes	0.202	0.308	0.318	0.256	0.290	0.366
423	Fixed vegetables oils, 'soft', crude, refined or purified	0.000	0.000	0.000	0.000	0.001	0.287
111	Non-alcoholic beverages, nes	0.001	0.003	0.041	0.114	0.189	0.257
	Sub-total	95.760	81.664	89.998	91.574	97.777	98.916
073	Chocolate and other food preparations containing cocoa, nes	0.000	0.022	0.016	0.022	0.301	0.249
0572	Other citrus fruit, fresh or dried	0.587	0.287	0.245	0.452	0.302	0.188
121	Tobacco, unmanufactured; tobacco refuse	0.491	0.314	0.139	0.424	0.190	0.168
081	Feeding stuff for animals (not including unmilled cereal)	0.090	0.029	0.020	0.685	0.195	0.142

SITC	Product groups	1963-1965	1973-1975	1979-1981	1984-1986	1988-1990	1991-1993
0586	Fruit, temporarily preserved	0.069	0.101	0.050	0.034	0.094	0.075
0583	Jams, fruit jellies, marmalades, fruit purée and fruit pastes, being cooked preparations, whether or not containing added sugar	0.144	0.193	0.086	0.085	0.069	0.068
037	Fish, crustaceans and molluscs, prepared or preserved, nes	0.001	0.106	0.000	0.513	0.009	0.062
0577	Edible nuts (excluding nuts chiefly used for the extracting of oil), fresh or dried	0.116	0.159	0.028	0.083	0.045	0.030
1122	Other fermented beverages, nes (e.g., cider, perry and mead)	0.000	0.000	0.019	0.008	0.010	0.023
0619	Other sugars; sugar syrups; artificial honey (whether or not mixed with natural honey); caramel	0.001	0.003	0.001	0.010	0.065	0.017
0224	Milk and cream, preserved, concentrated or sweetened	0.000	0.003	0.001	0.042	0.014	0.009
0541	Potatoes, fresh or chilled (not including sweet potatoes)	0.000	0.000	0.002	0.001	0.002	0.008
0546	Vegetables, fresh or chilled, nes	0.008	0.002	0.028	0.033	0.014	0.007
1121	Wine of fresh grapes (including grape must)	0.002	0.000	0.001	0.007	0.003	0.007
263	Cotton	0.000	0.000	0.000	0.000	0.001	0.005
0741	Tea	0.000	0.000	0.000	0.000	0.008	0.005
05482	Sugar beet, whole or sliced, fresh, dried or powdered; sugar cane	0.000	0.000	0.007	0.018	0.006	0.004
424	Other fixed vegetable oils, fluid or solid, crude, refined or purified	0.000	0.003	0.022	0.020	0.029	0.004
045	Cereals, unmilled (other than wheat, rice, barley and maize)	0.002	0.000	0.011	0.000	0.002	0.003
047	Other cereal meals and flours	0.000	0.000	0.000	0.000	0.000	0.003

SITC	Product groups	1963-1965	1973-1975	1979-1981	1984-1986	1988-1990	1991-1993
223	Oil seeds and oleaginous fruit, whole or broken, of a kind used for the extraction of other fixed vegetable oils (including non-defatted flours and meals of oil seeds and oleaginous fruit)	0.000	0.000	0.000	0.000	0.001	0.003
0615	Molasses, whether or not decolourized	2.076	1.177	0.203	0.001	0.071	0.002
0582	Fruit, fruit-peel and parts of plants, preserved by sugar (drained, glacé or crystallized)	0.000	0.000	0.000	0.001	0.002	0.002
0616	Natural honey	0.078	0.036	0.837	0.105	0.001	0.001
035	Fish, dried, salted or in brine; smoked fish (whether or not cooked before or during the smoking process)	0.001	0.000	0.000	0.006	0.002	0.001
05795	Pineapples, fresh or dried	0.000	0.000	0.000	0.010	0.001	0.001
05799	Other dried fruit	0.000	0.001	0.001	0.001	0.000	0.001
05792	Pears and quinces, fresh	0.000	0.001	0.000	0.000	0.000	0.000
05794	Berries, fresh	0.000	0.000	0.000	0.020	0.001	0.000
05796	Dates, fresh or dried	0.000	0.000	0.000	0.000	0.000	0.000
0575	Grapes, fresh or dried	0.000	0.000	0.000	0.003	0.001	0.000
0111	Meat of bovine animals, fresh, chilled or frozen	0.000	0.000	0.000	0.000	0.000	0.000
0112	Meat of sheep and goats, fresh, chilled or frozen	0.000	0.000	0.000	0.000	0.000	0.000
0113	Meat of swine, fresh, chilled or frozen	0.000	0.000	0.000	0.000	0.000	0.000
0114	Poultry, dead (i.e. fowls, ducks, geese, turkeys and guinea fowls) and edible offals thereof (except liver), fresh, chilled or frozen	0.000	0.000	0.000	0.000	0.000	0.000
0115	Meat of horses, asses, mules and hinnies, fresh, chilled or frozen	0.000	0.000	0.000	0.000	0.000	0.000

SITC	Product groups	1963-1965	1973-1975	1979-1981	1984-1986	1988-1990	1991-1993
0116	Edible offals of the animals falling in headings 0011, 0012, 0013 and 0015, fresh, chilled or frozen	0.000	0.006	0.000	0.000	0.000	0.000
0118	Other fresh, chilled or frozen meat or edible meat offals	0.000	0.092	0.000	0.000	0.013	0.000
0121	Bacon, ham and other dried, salted or smoked meat of domestic swine	0.000	0.000	0.000	0.000	0.000	0.000
0129	Meat and edible meat offals, nes, salted, in brine, dried or smoked	0.000	0.000	0.000	0.000	0.000	0.000
014	Meat and edible meat offals, prepared or preserved, nes; fish extracts	0.007	0.002	0.000	0.000	0.000	0.000
0223	Milk and cream, fresh (including skimmed milk, buttermilk, sour milk, sour cream, whey, kephir and yoghurt), not concentrated or sweetened	0.000	0.000	0.000	0.000	0.000	0.000
025	Eggs, birds', and egg yolks, fresh, dried or otherwise preserved, sweetened or not	0.000	0.000	0.000	0.000	0.000	0.000
041	Wheat (including spelt) and meslin, unmilled	0.000	0.006	0.000	0.000	0.000	0.000
042	Rice	0.000	0.000	0.000	0.000	0.000	0.000
043	Barley, unmilled	0.000	0.000	0.000	0.000	0.000	0.000
044	Maize (corn), unmilled	0.000	0.000	0.000	0.000	0.000	0.000
046	Meal and flour of wheat and flour of meslin	0.000	0.000	0.000	0.000	0.000	0.000
0542	Beans, peas, lentils and other leguminous vegetables, dried, shelled, whether or not skinned or split	0.000	0.000	0.000	0.001	0.000	0.000
0544	Tomatoes, fresh or chilled	0.000	0.000	0.001	0.265	0.000	0.000
0574	Apples, fresh	0.000	0.000	0.000	0.001	0.000	0.000
0576	Figs, fresh or dried	0.000	0.000	0.001	0.000	0.001	0.000

SITC	Product groups	1963-1965	1973-1975	1979-1981	1984-1986	1988-1990	1991-1993
05793	Stone fruit, nes, fresh	0.000	0.000	0.001	0.005	0.000	0.000
0612	Refined sugars and other products of refining beet and cane sugar, solid	0.001	15.750	8.285	5.588	0.772	0.000
0742	Maté	0.000	0.000	0.000	0.000	0.000	0.000
222	Oil seeds and oleaginous fruit, whole or broken, of a kind used for the extraction of 'soft' fixed vegetable oils (excluding flours and meals)	0.000	0.000	0.000	0.000	0.000	0.000
264	Jute and other textiles bast fibres, nes, raw or processed but not spun; tow and waste thereof (including pulled or garnetted rags or ropes)	0.560	0.008	0.000	0.000	0.000	0.000
265	Vegetable textile fibres (other than cotton and jute) and waste of such fibres	0.000	0.000	0.000	0.000	0.000	0.000
268	Wool and other animal hair (excluding wool tops)	0.007	0.030	0.000	0.000	0.000	0.000
2687	Sheep's or lambs' wool or other animal hair (fine or coarse) carded or combed (excluding wool tops)	0.000	0.000	0.000	0.000	0.000	0.000
	Total	100.000	100.000	100.000	100.000	100.000	100.000

Source: G. Gutman and L. Miotti, based on CTP-DATA.

Note: Product groups are shown in decreasing order of export value in the last subperiod (1991/93).

Table 2  
DYNAMISM OF OECD AGRICULTURAL IMPORTS, 1981-1993

Product groups <u>a/</u>		Annual cumulative growth rate (percentages)
		(1)
<b>Very dynamic markets</b>		
111	Non alcoholic beverages, n.e.s. <u>b/</u>	17.82
057980	Other fresh fruit	17.63
0546	Vegetables, frozen or in temporary preservative	16.39
0980	Edible products and preparations, n.e.s.	15.94
0114	Poultry, dead (i.e. fowls, ducks, geese, turkeys and guinea fowls) and edible offals thereof (except liver), fresh, chilled or frozen	15.57
048	Cereal preparations and preparations of flour or starch of fruits or vegetables	14.44
0619	Other sugars, sugar syrups, artificial honey (whether or not mixed with natural honey), caramel	13.60
037	Fish, crustaceans and molluscs, prepared or preserved, n.e.s.	13.50
05797	Avocados, mangoes, guavas and mangosteens, fresh or dried	13.13
1122	Other fermented beverages, n.e.s. (e.g. cider, perry and mead)	13.06
<b>Dynamic markets</b>		
046	Meal and flour of wheat and flour of meslin	12.77
034	Fish, fresh (live or dead), chilled or frozen	12.46
122	Tobacco, manufactured	12.32
0583	Jams, fruit jellies, marmalades, fruit purée and fruit pastes, being cooked preparations, whether or not containing added sugar	12.28
0742	Maté	12.13
05792	Pears and quinces, fresh	11.83
0586	Fruit, temporarily preserved	11.75
2927	Cut flowers and foliage	11.59
0223	Milk and cream, fresh (including skimmed milk, buttermilk, sour mil, sour cream, whey, kephir and yoghourt), not concentrated or sweetened	11.48
073	Chocolate and other food preparations containing cocoa, n.e.s.	11.46
0224	Milk and cream, preserved, concentrated or sweetened	11.24
05794	Fresh berries	11.08
1123	Beer made from malt (including ale, stout and porter)	10.96
0545	Other fresh or chilled vegetables	10.86
0113	Meat of swine, fresh, chilled or frozen	10.21
1124	Spirits (other than those of heading 512.16); liqueurs and other spirituous beverages, nes; compound alcoholic preparations (known as "concentrated extracts") for the manufacture of beverages	9.87

Product groups <u>a/</u>		Annual cumulative growth rate (percentages)
		(1)
036	Crustaceans and molluscs, whether in shell or not, fresh (live or dead) chilled, frozen, salted, in brine or dried; crustaceans, in shell, simply boiled in water	9.81
05793	Stone fruit n.e.s., fresh	9.76
0585	Fruit juices (including grape must) and vegetable juices, whether or not containing added sugar, but unfermented and not containing spirit	9.71
035	Fish, dried, salted or in brine; smoked fish (whether or not cooked before or during the smoking process)	9.24
0576	Figs, fresh or dried	9.15
0589	Fruit otherwise prepared or preserved, n.e.s., whether or not containing added sugar or spirit	9.07
05795	Pineapples, fresh or dried	9.02
056	Vegetables, roots and tubers, prepared or preserved, n.e.s.	8.70
0111	Meat of bovine animals, fresh, chilled or frozen	8.63
0575	Grapes, fresh or dried	8.47
1121	Wine of fresh grapes (including grape must)	8.44
0542	Beans, peas, lentils and other leguminous vegetables, dried, shelled, whether or not skinned or split	8.40
423	Fixed vegetable oils, "soft", crude, refined or purified	8.38
0573	Bananas (including plantains), fresh or dried	8.25
<b>Markets of intermediate dynamism</b>		
05799	Other dried fruit	7.60
0577	Edible nuts (excluding nuts chiefly used for the extracting of oil), fresh or dried	7.27
0571	Oranges, mandarins, clementines and other similar citrus hybrids, fresh or dried	7.14
0544	Tomatoes, fresh or chilled	7.12
047	Other cereal meals and flours	6.98
0611	Sugars, beet and cane, raw, solid	6.97
0574	Apples, fresh	6.89
0582	Fruit, fruit-peel and parts of plants, preserved by sugar (drained, glacé or crystallized)	6.58
014	Meat and edible meat offals, prepared or preserved, n.e.s.; fish extracts	6.57
0541	Potatoes, fresh or chilled (not including sweet potatoes)	6.43
075	Spices	6.19
0112	Meat of sheep and goats, fresh, chilled or frozen	6.16
0572	Other citrus, fresh or dried	6.01

Product groups <u>a/</u>		Annual cumulative growth rate (percentages)
		(1)
<b>Stagnating markets</b>		
042	Rice	5.74
0116	Edible offals of the animals falling in headings 0011, 0012, 0013 and 0015, fresh, chilled or frozen	5.64
0121	Bacon, ham and other dried, salted or smoked meat of domestic swine	5.53
081	Feeding stuff for animals (not including unmilled cereals)	5.35
05796	Dates, fresh or dried	5.16
0118	Other fresh, chilled or frozen meat or edible meat offals	4.97
025	Eggs, birds', and egg yolks, fresh, dried or otherwise preserved, sweetened or not	4.74
0115	Meat of horses, asses, mules and hinnies, fresh, chilled or frozen	4.05
041	Wheat (including spelt) and meslin, unmilled	3.91
0129	Meat and edible meat offals, n.e.s., salted, in brine, dried or smoked	3.88
121	Tobacco, unmanufactured; tobacco refuse	3.59
0616	Natural honey	3.41
424	Other fixed vegetable oils, fluid or solid, crude, refined or purified	2.63
0548	Vegetable products, roots and tubers, chiefly for human food, n.e.s., fresh or dried	2.26
05482	Sugar beet, whole or sliced, fresh, dried or powdered; sugar cane	2.13
0741	Tea	1.77
072	Cocoa	1.14
268	Wool and other animal hair (excluding wool tops)	1.08
222	Oil seeds and oleaginous fruit, whole or broken, of a kind used for the extraction of 'soft' fixed vegetable oils (excluding flours and meals)	0.76
045	Cereals, unmilled (other than wheat, rice, barley and maize)	0.08
0615	Molasses, whether or not decolourized	0.03
<b>Declining markets</b>		
263	Cotton	-0.09
043	Barley, unmilled	-0.37
265	Vegetable textile fibres (other than cotton and jute) and waste of such fibres	-0.47
044	Maize, unmilled	-1.22
223	Oil seeds and oleaginous fruit, whole or broken, of a kind used for the extraction of other fixed vegetable oils (including non-defatted flours and meals of oil seeds and oleaginous fruit)	-1.36
071	Coffee and coffee substitutes	-2.84



Product groups <u>a/</u>		Annual cumulative growth rate (percentages)
		(1)
2687	Sheep's or lambs' wool or other animal hair (fine or coarse) carded or combed (excluding wool tops)	-4.31
264	Jute and other textiles bast fibres, n.e.s., raw or processed but not spun; tow and waste thereof (including pulled or garnetted rags or ropes)	-4.33
0612	Refined sugars and other products of refining beet and cane sugar, solid	-5.46

**Source:** Gutman and Miotti based on CTP-DATA.

**Notes:** (1) Cumulative annual growth rate of OECD world imports. Very dynamic markets: annual cumulative growth rate  $\geq 13\%$ .  
Dynamic markets:  $8\% \leq$  annual cumulative growth rate  $< 13\%$ .  
Markets of intermediate dynamism:  $6\% \leq$  annual cumulative growth rate  $< 8\%$ .  
Stagnating markets:  $0\% \leq$  annual cumulative growth rate  $< 6\%$ .  
Markets in decline: annual cumulative growth rate  $< 0\%$ .

a/ The numbers in the first column refer to the group, subgroup or item of the Standard International Trade Classification, Revision 2.

b/ nes = not elsewhere specified or included.