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**SUPPLY OF SELECTED PRODUCTS TO THE TOURISM INDUSTRY
IN THE CARIBBEAN**

XP/CAR/96/082

*Technical report: Findings and recommendations**

Prepared by the United Nations Industrial Development Organization

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Abstract

Supply of Selected Products to the Tourism Industry in the Caribbean Region. Project XP/CAR/96/082

PROJECT OBJECTIVES

To identify market opportunities and to promote new investments in industries which supply the needs of the tourism sector in the Caribbean Basin and to implement a program of assistance to these industries, with a view to improving the quality and competitiveness of selected products and to foster regional trade and cooperation. The targeted sectors of industries included: food processing, textiles and garments, leather, paper, furniture and wood, chemical, personal care, plastic, handicrafts and pottery products.

DURATION AND DEVELOPMENT OF THE PROJECT

The mission started the 3 of June, with the final preparation of the methodology for the survey to be carried out by the national experts and ended in the first phase, with the submission of this report, November 21, 1996

CONCLUSIONS AND RECOMMENDATIONS

The scope of the project aims to include, in its final results, the big Caribbean Basin that includes the 32 island Caribbean countries, plus Mexico, Belize, all the Central American countries and Panama, Colombia and Venezuela.

Tourism activity in the Caribbean is one of the pillars of the economy and one of the main generators of foreign exchange for the countries of the region. The tourism in the Caribbean Basin is composed of two sectors: stopover tourists, which in 1992 were around 12 million and the cruise visitors, which according to the Caribbean Tourist

Organization were 7.9 million passenger visits in 1994. Each one of these two sectors, even though they require the supply of similar goods for its daily operation, the form of acquisition, distribution and supply is different.

Tourist expenditures in food and beverage are between 6 and 13%, entertainment around 9% and other expenditures as maintenance, cleaning and toiletry and textile products are between 5 to 7%.

An estimated tourist income, in the countries of the Caribbean Basin, of 8 billion US dollars, permits us to estimate that 640 million dollars per year are spent in food and beverages, and 720 million in handicrafts and assorted products. This is the total market for the 42 countries, in the tourist spots located in the region. (For Mexico only includes Cancun and Cozumel and for the Central American countries and Colombia, the tourist places in the Caribbean).

With the exception of some hotel chains, which operate according to the rules established by its headquarters, the rest buys its inputs in the local market, using the local distributors that supply the national or imported products, through the same channels used to supply the medium and upper classes of each of the countries.

The Project aims to promote new investments in the region, and at the same time promoting technical assistance, transfer of technology, joint ventures, with already existing firms, strategic alliances and the organization of international fora of entrepreneurs of the region, to promote and facilitate regional sourcing of finished and intermediate goods for the tourism industry and its suppliers, as well as those consumed by the rest of the population.

The national studies revealed that to promote international trade among the countries of the Caribbean Basin it is necessary to have good ports and transportation infrastructure, efficient highways, improve the skill of the labor force and the development of regional trading companies.

The main proposals of the study are:

1.- For the group of industries that were selected for the first phase of the study, which depend more from the domestic market than from the tourism market, according to the results of the four national studies realized, the proposal consists on organize regional seminars that will help them to increase their efficiency and competitiveness. These sectors are: Meat industries; dairy industries; processed and grinder of cereals; bakery products; corn processed products; repair of furniture; printing shops, publishing companies and related industries; pottery and tiles, and tobacco products. The objectives of the seminars will be to improve the quality of the products, promote technical alliances, promote the establishment of associations of producers, developing common standards, and foster design and technological centers.

2.- Include in phase 2 of The Project only the following products: canned and preserved foods; chocolate and candy manufacturing; garments and manufactured textile products, such as: bed linens, tablecloths, napkins, towels and similar products); rubber and plastic shoes; packaging activities; furniture manufacturing; production of cellulose and paper products. janitorial type products; paints and coatings; personal care products, plastic products and the main products required to outfit new hotels and refurbish existing ones. Additionally it is convenient to include the main manufactured inputs for these industries, with the exception of the products mentioned in paragraph 5 below.

3.- The possibilities to supply the cruise ship industry, with the products proposed in the previous paragraph, also will form part of the phase two of The Project, remembering that it is necessary to use different approaches of sales and marketing.

4.- Include in the analysis of phase 2 of The Project the possibilities to use the already existing trading companies and wholesalers, to promote trade among the countries of the Caribbean Basin. This has been suggested, as a more efficient and fast form to operate. They will have to be approached, in order to make them part of The Project, obtain their participation in the development of the specific projects as shareholders and/or with long term contracts of acquisitions.

5.- Eliminate from The Project the following activities, for the low percentage of the demand that tourism activities represents: beverages, alcoholic and non alcoholic; leather products; leather shoes; edible oil and greases; sawmill products; sugar; textile products of hard fibers; textile products of soft fibers; knitted products; carpets. Also eliminate the inputs to produce them.

6.- Promote the formation of clusters of small and medium industries, in some of the countries of the region, to produce for their domestic market as well as to supply other countries of the region. That could be the case of processed agricultural products, personal care products, paints and coatings, etc.

7.- The association of Caribbean producers of specific products, could be achieved through the promotion of common standards and trademarks. This could be done without discontinuing the production of the trademarks already on the market. For this purpose it could be convenient to organize entrepreneurial meetings, for specific branches of industries.

8.- Promote, with the governments of the countries of the region, the participation of the industries selected for the Phase 2 in the negotiations in CARICOM, as well as in the Central American Common Market, in order to facilitate the commercial exchange of these products. Additionally, for the same products, promote tariff reductions among the countries of the recently established Association of Caribbean countries. This would imply negotiations between CARICOM, the Central American Common Market and the Group of Colombia, Mexico and Venezuela.

9.- For the second phase of the project is necessary to have the studies and cooperation of the World Tourism Organization; the Caribbean Tourism Organization; the Florida, Caribbean Cruise Association; and financial support to develop the projects from the International Financial Corporation of the World Bank and the Interamerican Development Bank.

INTRODUCTION

- 1.01.- Tourism is one of the most important sectors of the economies of all countries in the Caribbean Basin and a major foreign exchange earner. Much work, therefore, must be done to promote linkages within the manufacturing industry and the tourism industry.
- 1.02.- The growth and development of the tourism industry in the region and its expansion, in the foreseeable future, make it necessary to promote the establishment, improvement or the complementarity of industrial activities that supply the tourism industry.
- 1.03.- The Project aims to include, in its final results, proposals to supply the big Caribbean Basin, that includes the 29 island Caribbean countries, plus Mexico, Belize, all the Central American countries and Panama, Colombia and Venezuela.
- 1.04.- The tourism in the Caribbean Basin is composed of two sectors: stopover tourists, which in 1995 were around 14.2 million in the Caribbean Islands; 20.2 million to Mexico; 2.5 million to Central America and Panama, and 1.9 million to Colombia and Venezuela. The cruise visitors, according to the Caribbean Tourism Organization, were 7.9 million passenger visits in 1994 to the Caribbean Island Countries and the ports of Cozumel and Cancun in Mexico. Each one of these two sectors, eventhough they require the supply of similar goods for its daily operation, the form of acquisition, distribution and supply is different.
- 1.05.- In the case of the supply to the cruise ships, a study of the Florida-Caribbean Cruise Association established that, in 1995, there were 7.9 million passenger visits to the Caribbean, and that a passenger on a 7 day cruise, with an industry average of 3.5 port destinations per cruise, would spend approximately US\$434 at ports during the trip. Of this figure 61% corresponds to shopping, 13% to

food, and 7% in attractions, as the most important items. Shopping is mostly related with duty free sales, which are not relevant for locally manufactured products. If 7% is added to the last two items the shopping that is spent on locally manufactured products, a figure of US\$ 980 million is obtained, as the actual expenditure of this type of tourism to the region.

- 1.06.- In the case of hotels, according to a study realized by the Organization of American States together with the Government of Jamaica, using the input-output table of 1977, with limited updating, from the value added in the tourism industry 50% is accommodation, 6% is food and beverages, 9% is entertainment, 7% is shopping and 38% are miscellaneous items. The World Tourism Organization recently finished a comprehensive study, together with the Central Bank of Dominican Republic, about the National accounts of tourism in that country. For the second phase of the Project it is necessary to have this document, as a reference for the goods consumed by the tourism industry.
- 1.07.- From these figures it is possible to see that tourism expenditure on food and beverage is between 6 and 13%, entertainment around 9% and other expenditures such as maintenance, cleaning and toiletry and textile products are between 5 to 7%. The tourism income, in 1995, for the Countries of the Caribbean Island Countries was 12.5 billion US dollars; 6.2 billion for Mexico: 1.5 billion for Central America, and 1.3 billion for Colombia and Venezuela. The total of 21.5 billion US dollars, allows us to estimate that 1.7 billion US dollars were spent on food and beverages, and 1.9 billion on handicrafts and assorted products. This is the total market for the 39 countries, in the tourism spots located in the region
- 1.08.- A tourist income in the countries of the Caribbean Basin, of 21.5 billion US dollars, permits to estimate that 1.7 billion dollars are spent in food and beverages, and 1.9 billion in handicrafts and assorted products. This is the total market for the 39 countries, in the tourist spots located in the region.

- 1.09.- With the exception of some hotel chains, that operates according to the rules established by its headquarters, the rest buys its inputs in the local market, using the local distributors that supplies the national or imported products, through the same channels used to supply the medium and upper classes of each of the countries.
- 1.10.- The governments of the countries of the region are making efforts to increase the consumption of local products, taking into account the existence of a globalized and competitive economy. In some cases, local products (when they exist) lack quality and presentation, the design is inappropriate, the diversification is poor, the prices are higher than those imported, the delivery time is often exceeded, and there is hardly any complementarity among the countries of the region. This latter situation is accentuated between the English-speaking and the Spanish-speaking countries, as well as with the French-speaking countries.
- 1.11.- Increasing production and improving the quality of the products, according to market requirements, will not only serve the purpose of supplying the tourism industry, but also the local market, and increase the trade relations among the countries of the region.
- 1.12.- With these basis UNIDO has launched the project “The Supply of Selected Products to the Tourism Industry in the Caribbean Region” (The Project), with the objectives of identifying and promoting new investments in industries that will supply the needs of the tourism industry in the Caribbean Basin and of implementing a program of assistance to the industry in order to improve the quality and competitiveness of selected products. Once the projects have been identified, project proposals will be prepared and presented to regional and international institutions for funding and implementation.

As a result of the study the sectors originally included in The Project, were classified in the following form:

- 1.- Industries which already exist in some of the Caribbean countries, and their main buyers being their respective domestic markets, (the tourism activity only demands between 2 to 6% of their production): Meat industries; dairy industries; processed and grinder of cereals; bakery products; corn processed products; edible oil and greases; sugar; beverages, alcoholic and non alcoholic; tobacco products; leather products; leather shoes; sawmill products; repair of furniture; printing shops, publishing companies and related industries; handicrafts; pottery and tiles, excluding building materials; textile products of hard fibers; textile products of soft fibers; knitted products; carpets. As a consequence also it is proposed not to include the inputs to produce them. What these industries may require is technical assistance to improve the quality of their products, promote technical alliances, induce the association of producers, develop common standards, and foster design and technological centers. In all these fields the support of UNIDO would be very helpful.

- 2.- The sectors that are proposed to be included in the phase 2 of The Project are: canned and preserved foods; chocolate and candy manufacturing; garments and manufactured textile products, such as: bed linens, tablecloths, napkins, towels and similar products); rubber and plastic shoes; packaging activities; furniture manufacturing; production of cellulose and paper products. janitorial type products; paintings and coatings; personal care products, and plastic products. Additionally it is proposed to include the main manufactured inputs for these industries.(including bed linens, tablecloths, napkins, towels and similar products); packaging activities; janitorial type products; paintings and coatings; personal care products; plastic products; canned and preserved foods; chocolate and candy; rubber and plastic shoes; manufacture of cellulose and paper products. Also it is

proposed to include the main manufactured inputs required to manufacture the above mentioned industries many of which are produced and can be supplied by Colombia, Mexico, Venezuela, Costa Rica, Cuba, Trinidad and Jamaica, to mention just some of them. That is the case of some petrochemical and chemical products, synthetic and artificial fibers, steel and aluminum.

- 3.- Include in the analysis of phase 2 of the Project the establishment of trading companies or the possibility to use the already existing ones, to promote trade among the countries of the Caribbean Basin.
- 4.- For the second phase of the project it is necessary to have the studies and cooperation of the World Tourism Organization; the Caribbean Tourism Organization; the Florida, Caribbean Cruise Association; and financial support to develop the projects from the International Financial Corporation of the World Bank and the Interamerican Development Bank.

Structure of the Report

In order to appraise the possibilities of industrial development for the four countries of the sample, the first Chapter presents a short summary of the macroeconomic situation for the period 1991-1995 and a forecast for 1996-2000. The second Chapter explains the development of the tourism industry, of the four countries, from 1991 to 1995 and a forecast for 1996 to 2000. The Chapter III presents an analysis of the target industries selected for the phase 1 of The Project. Conclusions and recommendations are the last part of this report.

CHAPTER I**MACROECONOMIC SITUATION OF BELIZE, CUBA, HONDURAS AND
JAMAICA.****A.-THE BELIZE ECONOMY****1.- The Belize economy (1991-1995)**

- 1.01 Belize's development strategy is primarily private sector led, as this sector is the main vehicle for the production of goods and services.
- 1.02 The country offers a near textbook case of a small, open economy. Foreign trade dominates the economy, as can be measured from its ratio of exports and of imports to Gross Domestic Product (GDP). During its early stages of development, Belize could be described as having an extractive economy that provided raw forest products and agricultural commodities to England. Early exports were logwood, mahogany, chicle (chewing gum) and bananas. As the population expanded, the production base increased --in fact, changed-- as forest products gave way to agricultural commodities (sugar, citrus concentrates, bananas) which are currently being exported in a semi-processed state.
- 1.03 The Belize economy, which achieved extraordinarily high growth rates in the period 1986 - 1990 (rising from 3.0% annual growth in 1986 to 13.2% and 10.3% in 1989 and 1990, respectively) began a downward trend in the period 1991 - 1995, averaging a 4.4% annual growth rate during that period, as against 8.92% over the previous five years. This decline in economical performance has been attributed to unfavorable external disturbances and local fiscal imbalances
- 1.04 The economy of Belize (Table 1.1) continues being dependent on agriculture or on agricultural-related industries, although substantial remittances from Belizeans

living abroad (particularly in the United States of America) and from the British forces training in Belize are said to contribute close to 10% of Belize's foreign exchange earnings.

- 1.05 Agricultural production, including forestry and fishing, today accounts for 19.6% of GDP, but has seen its share reduced in relative terms over the past decade. The agricultural sector is dominated by the production of sugar, citrus and bananas, which among them contributed US \$70 million in 1994. This figure is expected to rise in absolute terms over the next few years, as citrus production from young groves entering the productive stage increases. Agricultural exports also account for 85% of merchandise exports and 45% of total export earnings.
- 1.06 The manufacturing sector produces 17% of GDP, but two-thirds of that is from sugar and citrus processing and another 20% from cigarette and beverage processing. Garment production is the only significant non-agricultural manufacturing activity, accounting for about 6% of manufacturing value added.
- 1.07 The construction industry, which was booming in the late 1980s and early 1990s, has experienced a considerable decrease from 8.3% of GDP in 1993 to 6.4% in 1995. Import substitution activities have not really prospered, despite high levels of protection, including quantitative restrictions, licensing and investment incentives.
- 1.08 "Services" accounts for about 56% of GDP, with trade, tourism, transport and communication making up close to 60% of that. Transport and communication has been one of the more rapidly growing sectors in recent years, increasing annually from 8.7% of GDP in 1984 to 14.6% in 1993 and remaining constant at that level for the past three years. Tourism services have also been increasing, although the trend has been erratic, climbing from a low of 15.5% of GDP in 1984 to 19.2% in 1990 and gradually falling to 17.9% in 1995. On the other hand, tourism has become big business in Belize in the 1990s and most industry

experts expect it to increase, particularly in the area of eco- and cultural tourism.

- 1.09 Given the economic composition of the economy, most of the inputs into the productive sector are imported, along with consumer goods. These characteristics make the economy highly vulnerable to external shocks. Given this, the term “imported inflation” would be the most appropriate term to describe this type of inflation. In spite of the above, however, official inflation has remained fairly low, averaging 2.5% per annum over the past decade. This situation is not expected to worsen in the medium term. (Table 1.1)

2.- Belizean economy forecast (1996-2000).

- 2.01 The Ministry of Economic Development (MED), in its *draft* “National Development Strategy 1996-2000”, notes that the slowdown of the economy in the 1990-1994 period was caused by a contraction of public investment, a sharp drop --by 20.5%-- in construction activity and the departure of the British Forces, whose expenditures traditionally contributed approximately 4% of GDP. An expansion in the tourism industry and a solid export performance were insufficient to offset the impact of these deficiencies, which worsened in the face of significant short-term debt repayments that became payable.
- 2.02 The MED’s National Development Strategy identifies economic diversification as the main vehicle towards an improved economy. This will be accomplished through the development and marketing of new products, identifying and utilizing new ways of producing and marketing traditional products, identifying and penetrating new markets. The productive sector, made up of tourism, agriculture, manufacturing and extractive industries is expected to generate sufficient income to meet national needs, albeit with some improvement of its efficiencies and competitiveness.
- 2.03 In tourism, Belize will continue its policy of promoting the country as an eco-

tourist destination. In order to sustain this, it will continue fostering the link between environmental protection and tourism, to promote the development of archaeological sites and production of cultural artifacts. This will require investment expansion, marketing and improvement in the quality of services offered to visitors.

- 2.04 In the area of agricultural production, Belize will continue providing support to sugar, citrus, bananas, while at the same time promoting efforts at diversification into other non-traditional commodities. Because of the liberalization of the economy by way of the removal of quotas, the reduction of the level of import duties in line with the commitments to the Caribbean Community (CARICOM), and the possibility of Belize's preferential export marketing arrangement eroding over time, agricultural (and other) productive enterprises must become more efficient.
- 2.05 Manufacturing also faces strong challenges from an international liberalization trading regime, which would force Belize's small and fledgling manufacturing sector to become competitive. The garment industry, matches, arts and crafts, pepper sauces, jams and jellies, as well as batteries, paper products, flour, beverages, etc. are aware that their survival will depend on their efficiencies and how well they combat the problems of high energy costs, lack of/or expensive capital, a relatively unskilled labor force and quality control.
- 2.06 Faced with an era characterized by global trade liberalization and an increasing emphasis on production efficiencies and competitiveness, Belize must now reorient its productive sector towards an export culture, that would simultaneously satisfy import substitution and export expansion, while meeting other objectives, such as job creation and foreign exchange earnings and savings.
- 2.07 Government's National Development Strategy, 1996 - 2000 emphasizes a favorable macro-economic environment for accelerated economic growth that

promotes local and foreign investments. This will entail the re-establishment of the confidence of the private sector through the improvement of the fiscal management of the public sector. The strategy will establish monetary policies that will contain the foreign reserve loss and maintain a stable exchange rate. Government will also seek physical infrastructural improvements to facilitate the role of the private and the community sectors

2.08 Belize's medium to long-term development projects will depend to a large extent on:

- a) Its macro-economic management performance
- b) The behavior of international commodity prices for its main export commodities
- c) The impact of international trade liberalization and of the preferential access arrangements governing citrus, bananas and sugar
- d) Its ability to attract and absorb increased external savings
- e) Its ability to attract and retain local and international investment
- f) Its ability to further develop its human resource base
- g) Its ability to deal with its environmental problems

The medium-term outlook (1996 - 2000) is for the country to continue recording positive growth in the export sector, as the preferential marketing arrangements for sugar, citrus and bananas will most certainly continue for the next five years. It is not unreasonable, then, to anticipate GDP growth in the 5% per annum range over the next 5 years. Projections beyond the year 2000 will not be so favorable.

- 2.09 While the population is expected to increase to around 250,000 by the year 2000, GDP, at current market prices, is projected to rise consistently with the average increases over the past 10 years, which was estimated at 10% per annum and per capita GDP at 8% per annum.

B.- THE CUBAN ECONOMY**3.- The Cuban economy (1991-1995)**

- 3.01.- In the 1991-1995 period the Cuban Economy had to face the consequences of the sharp and unexpected disappearance of the socialistic Europe, the disintegration of the USSR (in 1989 approximately 85% of the commercial exchange was accomplished with the USSR and other Eastern Europe countries. In 1991 the principal markets for the sugar, nickel and citric products were lost and the prices of these items descended significantly in these years). The situation was worsened by the economics measures, economic commercial and financial (economic blockade) imposed unilaterally by the United States against Cuba by three decades, what has caused that the country fell in one of the deepest economic crisis its history, known as "Special Period".
- 3.02.- The country, during these years, carried out a economic strategy that allowed, in 1994 and 1995, to stop the diminishing trend of the economy in the first year and to begin the recuperation from second.
- 3.03.- To analyze the period 1991 - 1995 it has to be taken as reference for the main economic indicators the year 1989, that was the final year of stability in the external supplies.
- 3.04.- Upon comparing 1993 with 1989, the following results are shown:
- Fall of the GDP by 35%.
 - 77% decrease of the 77% in the total foreign trade.
 - Disequilibrium in the internal finances, that were expressed, fundamentally, in fiscal deficit and excess of monetary liquidity. (Table 1.2)
- 3.05.- During the period 1990 - 1993 an Adjustment Program was applied and an Opening program to the foreign trade to administer the crisis, known as National

Emergency Program in Peace Time, in which the capacity to import was defined in the basis of the available external liquidity.

- 3.06.- In agriculture important changes were produced, when the state farms, that occupied 75.2% of the cultivable lands, were converted into cooperatives, reducing by approximately 40% the subsidies by the State in these farms.
- 3.07.- In 1993 the concept of self employment were widened, diversifying the opportunities to provide no state employment in the production and in services.
- 3.08.- In 1994 the Cuban economy had a growth rate of 0.7% meaning, for the first time, the reversal of the trend of a decreasing economy, that happened during the three previous years. In 1995 the growth rate reached 2.5%, confirming the trend to the upswing experimented in 1994. (Table 1.2)
- 3.09.- The measures taken during 1994-1995, to administer the economy and to begin their reactivating were: A deep restructuring of the Central Administration of the State; the reduction of the excess of currency; prices increases, diminution of subsidies, introduction of taxes, to restore the financial situation.

These measures allowed the decrease of the budgetary deficit in 1994, with a reduction of approximately 24%. In the second half of 1994 was completed the gradual application of a new tributary system. In October of 1994 was created the Agricultural Market, and in December of that year the Market of Industrial Articles and Handicrafts, operating at free prices. Today the participation of the non state sector, in the sales of these products, represents the 80% in the first and 43% in the second.

- 3.10.- It was established a new salary and occupational treatment to the available workers, assuming the State the necessary subsidies for this purpose.

- 3.11.- In September 1995 it was approved a new Law of Foreign Investment.
- 3.12.- Notwithstanding, the humanist spirit of the political economy was preserved. The Infantile Mortality rate reached 8.7 for 1000 inhabitants; the mother mortality rate reached 4.3 for 10 000 inhabitants; it exists 51.8 physicians for every 10 000 inhabitants; 24 teachers by 1000 inhabitants, and the life expectancy reaches the figure of 75.5 years.
- 3.13.- After five years of having assumed a strategy of survival, the economic crisis, the deepest that have faced the country, it has been demonstrated the validity of the strategic line followed. Now, from the survival stage Cuba has passed already to the sustained development.

4.- Cuban economic forecast (1996-2000)

- 4.01.- In 1996 the projects of planning were recaptured and the government is working in the design for the policy up to year 2000, whose first results will not be ready until 1997.
- 4.02.- In the first semester of 1996, the process of recovery, with a growth of the GDP of 9.6%, was confirmed. The production of sugar grew 33.6%.
- 4.03.- The production of goods and services for the export, in this semester, grew at a rate of 34% and the gross formation of capital at 13%.
- 4.04.- The tourism grew at 46% with respect to the first semester of the previous year. The industrial production grew (without including the sugar industry) in 10.9%.
- 4.05.- Respect of the period 1996 - 2000, according to preliminary criteria of consulted experts (Alfredo Gonzalez Gutierrez and Elena Alvarez Gonzalez, of the Institute of Economics Investigations) for the year 2000, the GDP will reach between 16,

830 and 19,375 MMP; the agricultural GDP will be between 1,225 - 1,345 MMP, The Manufactured Industry GDP would be between 5,725 - 6,265 MMP and the GDP of the Services between 9,220 - 9,680 MMP. The population will be of 11,147 million inhabitants and the employment will be between 3,655 - 3,840 thousands of workers. (Table 2.1).

C. - THE HONDURAN ECONOMY

5.- The Honduran economy (1991-1995)

- 5.01.- In 1990, after a fall of the general economic activity, due to the application of the structural adjustment policy, a recovery was achieved in the years 1991 to 1993, (Table 1.3). Between 1990 - 93 the GDP increased 5% yearly. This growth was based in the increase of exports of the in-bond industry, seafood and some non traditional products, as citrics, and melons.
- 5.02.- This growth was also influenced by the investments program in physical infrastructure. The gross net investment increased 60%, between 1990 and 1993, at an annual rate of 17 percent.
- 5.03 The recovery reached in 1991-93 resulted compensated by the changes occurred in the two last years (1994-95). During 1994 the country faced an acute crisis of energy, that made decrease the economic activity by 1.4%, compared to the level reached in 1993. It is estimated that in 1995 the economy recovered growth to the 3.6%, relatively a similar rate of the growth of the population.
- 5.04.- The imports of goods grew 18% between 1990 and 1993, due to the commercial opening, while the exports grew almost 3% in the same period. With these behavior in international trade. The trade deficit increased. Imports continued growing and in 1995 reached 1.5 billions of dollars, increasing the trade deficit and the external indebtedness.

- 5.05.- As already was mentioned internal investment generated the greater dynamism in global demand. Between 1990 and 1995 it grew at 13.9% annual, as compared to 2.3% of the final consumption (inferior to the growth of the population) and to the 7% growth of exports. To a large extent the domestic consumption acted as the adjustment variable.
- 5.06.- In spite of the stabilization policy undertaken by the economic authorities, the levels of inflation continued increasing in 1990 - 95. The index of the consumer prices reflected in the NPI, continued increasing above the 10% per year, except for 1992. The average growth in the period 1990 - 95 was of 20.9% annual, above the historical increase of prices in Honduras (3 to 5% annual). The successive devaluations and the difficulties that face the productive sector to increase the food supply, explain, in large part, this situation.
- 5.07.- The minimum wage, that it is established by decree by the national government, maintained, though with a lag, the pace with inflation. Only half of the employed workforce receives a salary as remuneration for their work, a huge proportion are informal workers.
- 5.08.- The opening process of the national economy was made in 1994 by means of a progressive reduction of the import duties and of the elimination of permits of import. The maximum duty that was of 90%, and on the average of 35%, was reduced to a 20% as a maximum ceiling and a minimum of 5%.
- 5.09.- The internal sales tax was increased from 5 to 7% and 10% for certain items. Export duty was abolished for all products. The tariffs of the public services were strongly increased. The rates of interest were freed to stimulate domestic savings and the legal deposit of the commercial banks in the Central Bank of Honduras (BCH) was increased until 40%.
- 5.10.- A program of privatization of the properties and companies of the State was

initiated, specially in the field of the production of goods. However, electricity companies, as well as water and of telecommunications, continued to belong to the State.

- 5.11.- The law of industrial promotion was abolished. Only remained outstanding the privileges established to the reexport industry (in-bond industry)
- 5.12.- The agrarian reform process, based on the distribution of government lands, was stopped. The new agrarian policy is based on the stimulus of the commercial agricultural companies.
- 5.13.- The average exchange rate of the national currency, the Lempira, was devaluated from 4.38 in 1990 to 9.47 for dollar in 1995 (11.50 in June of 1995), what means a devaluation of 16.7% per year. It is slightly inferior to the average annual growth of the National Price Index (NPI).
- 5.14.- The agricultural sector which is the most important, within the productive sectors, maintained a growth rate of 3.3% annually, between 1990 and 1995, supported, to a large extent by the growth of the non traditional agricultural products of export. The manufacturing sector, continued in the stagnation that has been observing in the last decade, that was deepened in the last 2 years, contributing to this situation the scarce dynamism of the internal market and the difficulties in increasing the levels of exports to Central America and the rest of the world.
- 5.15.- The growth of the construction sector, 4.5% annually, was benefited by the investments in roads and of other infrastructure works and by the construction of new housings of high value and by commercial buildings to attend the purchases made by the high and middle class in urban zones.
- 5.16.- The GDP of the services sector showed a dynamic behavior, growing at an average of 3.4% annually, supported in the increase of the commercial

activity and in the strong growth of the financial sector, due to the opening of new banks.

- 5.17.- With an average rate of growth of the 3% per year, the growth of the population of Honduras continues being one of the highest of Latin America and the Caribbean. The population of less than 20 years of age represents about 55% of the population of the country.
- 5.18.- The Economically Active Population (EAP) represented, in 1995, 32 percent of the total population, which is relatively low. As consequence of the high rate of growth of the population, the EAP showed an average growth of the 4.1% annually, during 1990 - 95.
- 5.19.- The BCH estimates that in the last years open unemployment in Honduras reached an average of the 8 percent of the EAP, while the under-occupied persons, that work less than 35 hours per week, is estimated between 23 to 25%.

6.- Honduran economic forecast (1996-2000)

- 6.01.- No government document exists where it is forecasted or estimated the probable behavior of the main macroeconomic indicators in the long term. A notable exception is the case of some variables related with the population, that counts on estimates made by the Fund of the United Nations for the Population.
- 6.02.- The probable behavior of the macroeconomic and macrosectorial variables between 1995 and the year 2000 are as follows¹: principal source of this information are the preliminary estimates of the Department of Economics Studies of the BCH with respect to 1996, while for the following years the economic

¹ Principal source of this information are the preliminary estimates of the Department of Economics Studies of the BCH with respect to 1996, while for the following years the economic indicators were estimated on the basis of a macroeconomics model of input-product, elaborated in 1995 for the Technical Mission of Japan in Honduras.

indicators were estimated on the basis of a macroeconomics model of input - output, elaborated in 1995 for the Technical Mission of Japan in Honduras.

- 6.03.- In 1995-2000 the rate of population growth will be of 3.3% annually, due to the lack of definition of the government in accepting the need to plan the growth of the population. The acceleration of the urban growth and on the level of education, observed in the last 20 years, can help to limit the population growth in the future. (Table 2.2).
- 6.04.- With respect to growth rate of the economic activity, represented by the changes in the GDP, a similar rate to the one observed in the last years is expected, which is 4% in real terms.
- 6.05.- The dynamics sectors will be: Construction and services, with 7 and 4.5% annual of growth, respectively.
- 6.06.- The agricultural and the industrial production, will grow at a slower rate to the expected growth of the economy, with 2.5 and 3.5% annual growth, respectively. This situation will contribute to the difficulties that the agricultural production faces and the diminution of the internal market for the industrial products produced in the country.
- 6.07.- Imports will continue to growth at a rate of 5 percent annually, more rapidly than the expansion of the exports of goods, anticipated at 2.7% annual for the period 1996-2000. The external commercial gap will therefore continue. It is expected that it can be compensated by a greater entry of capital from foreign sources.

D.- THE JAMAICAN ECONOMY**7.- The Jamaican economy (1991-1995)**

- 7.01.- The Jamaican economy has been stagnant over the past five years, in terms of growth in GDP. While real GDP in Jamaican Dollars has grown at rates between 0.8% and 1.4%, because of the deterioration in value of the Jamaican dollar, during the period under review, as a result of high inflation rates, relative to their major trading partners, GDP in US dollar terms has declined significantly.
- 7.02.- Tourism receipts have grown from US\$764.0 million in 1991 to \$965.0 million in 1995. This growth has gone a long way in funding a trade deficit, which has grown from US\$778.0 million in 1991 to US\$1,393.3 million in 1995.
- 7.03.- Despite the above, the nation's net international reserves has grown from a negative US\$356.3 million to US\$418.6 million.
- 7.04.- Manufacturing has not fared well during this period, declining from 19.4% of GDP in 1991 to 18.2 % in 1995. Agriculture and Services (which includes tourism) has grown from 6.2% and 14.1% respectively in 1991, to 8.1% and 17.1% in 1995. The growth in services has come from the financial and tourism sectors. The tourism industry, as a large purchaser of agricultural produce, along with the growth in the export of traditional and non-traditional agriculture, has assisted in the growth of the agricultural sector's share of the economy.

Table 1.4: Jamaica: Macro Economic indicators 1991 to 1995

	Unit	1991	1992	1993	1994	1995
GDP J\$	J\$B.(Cons \$)	17.5	17.7	18.0	18.1	18.2
GDP Growth Rate	%	0.7	1.4	1.4	0.8	0.8
GDP US\$	US\$B.(Cons \$)	1.5	0.8	0.7	0.5	0.5
Population	Millions	2.411	2.425	2.434	2.455	2.486
GDP/Capita	US\$	642.3	330.0	287.6	203.7	200.2
Exchange Rate	J\$ per US\$	11.30	22.88	24.15	32.90	35.15
Inflation Rate	%	80.2	40.2	30.1	26.8	25.6
Exports	US\$ Millions	1,056.6	1,031.8	1,058.3	1,182.8	1,379.6
Imports	US\$ Millions	1,828.6	1,775.4	2,189.2	2,172.2	2,772.9
Balance of Trade	US\$ Millions	(778.0)	(743.6)	(1,130.9)	(994.4)	(1,393.3)
Tourism Receipts	US\$ Millions	764.0	858.0	942.0	919.0	965.0
Balance on Current AC	US\$ Millions	(255.8)	10.9	(194.2)	18.3	(255.1)
Foreign Debt	US\$ Billions	3.9	3.7	3.6	3.7	3.4
Budget Surplus % GDP	%	2.2	2.8	2.1	1.3	0.4
Money Supply M1	J\$ Billions	6,867.9	10,283.6	14,396.2	16,374.0	23,227.7
Net Int'l Reserves	US\$ Millions	(356.3)	(50.7)	70.8	408.3	418.6
Unemployment Rate	%	15.4	15.7	16.3	15.4	16.2
Agriculture/ GDP	%	6.2	6.9	7.5	8.0	8.1
Manufacturing/ GDP	%	19.4	19.4	18.8	18.5	18.2
Mining /GDP	%	9.2	8.8	8.7	9.3	8.6
Services/GDP	%	14.1	14.6	15.3	15.9	17.1

Source STATIN

8.- Jamaican economic forecast (1996-2000).

8.01.- The National Industrial Policy (NIP) has as its major growth objective the doubling of the economic output in six years. This will mean unprecedented economic growth levels. The fundamental basis for this growth must be macro economic stability. Money supply and the budget deficit must be kept under tight management, leading to low inflation rates, interest rates and a stable currency. This scenario of monetary and fiscal responsibility provides a predictable platform from which investors can plan and is a fundamental assumption of the NIP. The performance of the government in respect of monetary and fiscal responsibility has been good over the past few months and it remains to be seen if they will stay the course, in light of an election due in the next two to three years.

8.02.- The NIP forecast rapid growth in mining, tourism, agriculture and specific manufacturing sectors, like apparel and agricultural-processing. The sophistication of the financial sector must increase with the development of the economy, to handle the levels of growth predicted and the increased complexity of transactions that will become commonplace in a more developed economy. Incentives are in place for the expansion of the targeted sectors and these are being reviewed by government with the view to improving them.

CHAPTER II**THE TOURISM INDUSTRY IN BELIZE, CUBA, HONDURAS AND
JAMAICA****A.- THE BELIZE TOURISM****1.- The Belize tourism industry (1991-1995)**

- 1.01.- Tourism is currently the number one industry in the world, amounting to US \$3 trillion annually. In Belize, tourism & tourism-related activities account for almost US \$80 million annually and about 18% of the country's GDP. Tourism is now one of the major foreign exchange earners, earning some US \$78 million in 1995.
- 1.02.- The tourism industry in Belize is generally owned and managed by the private sector while the public sector is responsible for creating the investment climate, promoting the industry abroad and for establishing the necessary institutional and physical infrastructure. The Belize Tourist Board (BTB), under the supervision of the Ministry of Tourism and the Environment (MTE), is the agency directly responsible for promoting tourism.
- 1.03.- Hoteliers, restaurant owners and other tourism related enterprises have formed themselves into the Belize Tourism Industry Association (BTIA). The BTIA represents some 350 members and has as its mission statement "*to promote the development of sustainable eco-cultural tourism for the development of Belize.*"
- 1.04.- Tourist arrivals have steadily increased since the 1980s and numbered 121,270 in 1995, which is a 56% increase over the 1991 figure of 77,542 (Table 3.1). Most tourists (about 60%) have traditionally come from the USA, but increasing proportions are now coming from Europe and Canada (Table 3.1). Tourist arrivals increased substantially from 1991 to 1994, but slowed down in 1995,

apparently due to the world economic crisis. (Tables 3.1.1 and 3.1.2)

- 1.05.- In order to cope with this rapid demand, the tourism industry undertook a massive expansion program, with the number of hotels increasing from 183 in 1988 to 362 in 1995, and the number of rooms from 1,855 to 3,708, in the same period. (Table 3.1.3, 3.1.4 and 3.1.5).
- 1.06.- It's no secret that Belize is a very high priced tourist destination and that competition from regional neighbors is forcing the Belize tourism industry to look at its pricing structure very seriously. The average room rate for the past three years shows a trend of escalating prices annually, from US\$53 in 1993 to US\$67 in 1996. (Table 3.1.6).
- 1.07.- Because it is so richly endowed with natural resources and with a long tradition of the Mayan civilization, Belize is uniquely placed to take advantage of this eco-tourism market. Belize is in an advantageous and critical position with the potential to expand its adventure travel and the eco-tourism industry. It does not have the mass tourism of Mexico, Europe, the United States of America or the Caribbean nor does it have the mineral or other extractive resources of some other countries. On the other hand, its rain forests are healthy, and, to a great extent, intact. Its wildlife, birds and flora, its barrier reef, islands and extraordinary marine environment, have long been recognized by nature lovers, ecologists, divers and fishermen. Environmental education & protection play a key role in sustaining eco-tourism. Eco-tourism now accounts for about 15% of the exploding tourism market and is growing.
- 1.08.- One of the least known resources to the international tourism is Belize's Mayan culture. Mundo Maya is a rich and unique resource, and its preservation, management and marketing must be handled with real care. Belize serves as the Secretariat and headquarters for Mundo Maya, which gives it another unique opportunity to present to the world the value and eco-cultural potential of the

Mundo Maya. Belize can be offered as a safe access to the Mayan culture, ruins and artifacts, with knowledgeable and skilled guides. The extent that the Mayan civilization that inhabited what is now known as Belize, is only now being recognized; there is thus a large scope also for archaeologists, anthropologists, and for those tourists who want to take a look at the past.

1.09.- The tourism industry in Belize does have its constraints. These may be summarized as follows:

- There is not much scope for large scale tourism development. The coastline has few sites that would attract large developments and the fragile environment limits the development of sites that would be considered attractive.
- There is always a clear and present danger of environmental degradation. Environmentalists already point to the extensive damage to and exploitation of the mangrove eco-system which, they predict, at current destructive rates, could disappear in the next 15 years. There is also the tourism development danger of over-exploitation on the island of Ambergris, the tourism capital of Belize. That destination is already suffering from severe solid and liquid waste management problems and coral reef deterioration.
- Belize is a high priced tourism destination and service quality is considered poor. Many tourists report poor “value for money” and few hotels and restaurants meet international standards. Hospitality services also need upgrading.
- Although industry officials and international development agencies have invested considerably in hospitality training, an adequate labor force is yet to be developed.

- The government is pursuing a policy of small family-run eco-tourism establishments countrywide, which will cater to the nature lover or to the low budget traveler; however, access to capital for the establishment of these resorts is still limited.
- The industry to date has developed in an ad hoc fashion. There are very few technical studies of carrying capacity, hotel and restaurant quality, regional or national development strategy, etc.

2.- Forecast of the Belize tourism industry, 1996-2000

- 2.01.- It is generally agreed that the future of the Belize tourism industry lies in eco-tourism or, as some would call it, eco-cultural tourism.
- 2.02.- Belize is gradually developing a tourism culture that encourages eco-tourism so that the average tourist is spending some time on the beaches and sometimes taking in Belize territorial resources, such as nature parks, camping, bird watching, etc..
- 2.03.- Government's policy states that it will promote the establishment of community-based eco-tourism. This initiative would encourage small, family-owned enterprises in the various eco-tourism localities that would cater to the needs of the tourist traveling outside of the main tourism centers. This type of establishment is expected to be cheaper, more nature-oriented and would bring the tourists closer to the community; it would also involve the community in seeking to preserve the tourism and conservation value of the country's natural resources. The establishment of this kind of tourism, however, would have to entail the institution of quality standards which are lacking today.
- 2.04.- Belize's medium term strategy to attract a greater number and better quality of

tourist must also include some element of skills improvement of the tourism workers. Hospitality services must improve and the tourist must feel that he is getting value for its money

- 2.05.- Much has been stated over the past few years about the rise in crime and security considerations in the Belize tourism industry. They have, no doubt, affected the tourism negatively. The Government of Belize, at the insistence of and in collaboration with the BTIA, has taken strong measures to alleviate the situation, including the creation of a tourism police force. There is some evidence that the crime situation is improving.
- 2.06.- Belize has suffered over the years from marketing problems, so that the trickle of tourists that arrive came mainly through word-of-mouth information, or casual visitors who did their own research or were looking for a different adventure. Over the past few years, and through the help of various international agencies, the MTE and the BTB has done the job of promoting Belize abroad. Europeans and Canadians are coming to the country in increasing numbers, while the US tourist continues coming. Future marketing thrusts must be made to attract more European travelers and some Japanese tourists. The industry must also do more to attract tourists from the Mexican and Central American region, roughly a market of about 50 million people.
- 2.07.- Belize tourism industry prospers during what is referred to as "*the tourist season*" (October to March), but takes a nose-dive from April to September. Future efforts at tourism promotion, then, must seek to attract tourists to Belize during this low period. There are indications that the industry is going along these lines.
- 2.08.- The Belize tourism industry has been lax in its efforts to persuade Belize to tour their own country. With a rapidly growing and young population, and an increasing awareness about the environment, the tourism industry will be well advised to embark on an expansion program that would take full advantage of the

spending power of this segment of the population within the next five to ten years .

B.- THE CUBAN TOURISM

3.- The Cuban tourism industry (1991-1995)

- 3.01.- From the final years of the 80'S, tourism has become a dynamic sector of the Cuban Economy. Its development is one of the priorities of the country in the last years.
- 3.02.- Tourism must provide an important part of the resources in foreign currencies that are needed to the country and, at the same time, a source of employment for thousands of persons, and a driving force for the development of other branches of the economy.
- 3.03.- In the period 1991 - 1995 the gross income of this industry grew to 734 MMP, the arrival of tourists grew in 174%, and the number of rooms were increased in 146%.
- 3.04.-The world tourism represents an annual average growth of 5.6% in the period 1990 - 1993; in the Caribbean its growth was of 3.9%, while Cuba from 1990 to 1993, achieved a growth of the 17%, what permitted to increase its percentile participation as a destination in the Caribbean from 2.8% to 4.1%. (Table 3.2.1.)
- 3.05.-Between 1993 - 1995 the tourism in South America grew at a rate of 8.8% annual, Central America in 3.9%, the Caribbean at 6.8% and Cuba maintained its rate of 17%.
- 3.06.-The principal countries of origin of the tourists to Cuba, in the period of 1991 to 1995, were: Canada, Italy, Spain, Germany, France, England, Mexico and Argentina. All of them accounted for 70% of the tourists that visited Cuba in said period.

- 3.07.-During the period 1987-1991, in the Caribbean, the average growth of the tourism income was 8%, while Cayman Islands, Cuba and Aruba had a more dynamic growths, with an increase of 31.5%, 19.9% and 18.4%, respectively. (Table 3.2.2)
- 3.08.-With respect to the lodging capacity of the area, Cuba in 1991 had 12% of the total and in 1993 its participation was of the 14%. (Table 3.2.3).
- 3.09.-The levels of occupation the Caribbean have had a growing trend, maintaining Aruba in the first place, followed by Dominican Republic and Cayman Islands. (Table 3.2.4)
- 3.10.-Cuba reduced the level of occupation in 1995 upon obtaining a relation rooms - days / tourists - days in 1995 of approximately 2 times, considering a mean stay of 7 days.
- 3.11.- With relation to the investment process the tourism sector was a priority. In the period about 990 MMP were devoted to construction of tourism installations, increasing in 7,595 new rooms and other recreational facilities, such as restaurants, night clubs, etc. In infrastructure approximately 170 MM were invested, 42% in airports, the rest was devoted fundamentally to give access to the cayeria north of Ciego de Avila and Camaguey.

4.- Forecast of the Cuban tourism industry (1996-2000)

- 4.01.- To the end of the first semester of 1996, the arrival of tourists increased by 46% compared to the same period of the previous year. " Cuba begins to develop as a touristic power and figure already among the 40 principal tourist countries. Even with the limitations of receiving direct tourists from the United States, the Island achieved extraordinary growths from 1991 to date.
- 402.- Internationally it is one of the highest rates and much has to do with the diversity of its offer and the composition of its market, since in a constant

form increases the caption from travelers originating from Europe and the Americas", expressed Antonio Enriquez Savignac, Secretary-General of the World Tourism Organization, during a recent visit to the Havana.

- 403.- With relation to the economics of tourism, in the first semester of 1996, Cuba reduced the relation cost/income by 5 cents in the Cost / USD of income (0.68) and increased 7 USD in the revenue by tourists - days (87 USD), compared with the first semester of 1995. This year 5,000 rooms will be added, among new and remodeled.
- 404.- 13 new joint ventures have been signed, which include 8,905 rooms. Also 36 hotels are administered by foreigners.
- 405.- The cruises to the Island began around the end of 1995. Each week the ship "Costa Playa" , with capacity of 480 passengers, has as itinerary Port Silver (Dominican Republic), Santiago of Cuba - Montego Bay (Jamaica), Bahia of The Havana and the North Oriental Bay of Nipe (Cuba).
- 4.06.- The "Health tourism" is developed with success, , with moderated prices and attractive therapeutic services with the support of recognized professionals. This system has linked 42 centers, including 9 international clinics located in the principal tourist centers and a network of hotels to give service to the patients and their companions.
- 4.07.- In the projections to 2000, the Ministry of the Tourism expects to receive some 2.5 million Tourists, at an average growth rate of 25%; to incorporate 5,000 annual rooms on the average, To reach about 50,000 rooms in the year 2000, and generating a gross income of 3.1 billion dollars at the end of the period, taking as reference a mean stay of 7.6 days.*

* Eduardo Rodriguez de la Vega. Tourism vice-minister. Granma, 17 of July of 1996. 1 Granma, 17 of July of 1996.

C.- THE HONDURAN TOURISM INDUSTRY

5.- The Honduran tourism industry (1991-1995).

- 5.01.- In Honduras the tourism sector has not reached a strong development, in relation to its potential, as a source to provide foreign currencies and generating employment to benefit the national population.
- 5.02.- The principal tourist resources of Honduras are: Beaches and reefs; the islands of the Bahia (Roatan, Guanaja and Utila), that are underlined by the beauty of their coral reefs, that form part of the second coral barrier in the world, after Australia; archeology counts with several archeological sites, the most visited is found in Copan, west of the country, with important ruins of the Mayan civilization, ecological tourism, and modern and colonial cities. Regrettably until the present this variety of resources has not constituted the base of a tourist activity in big scale, even though some advances have been achieved within a modest magnitude.
- 5.03.- As a consequence of the war conflict, which affected practically all the Central American region in the decade of the 80's, the number of visitors in all the countries of the region, and in Honduras in particular, declined significantly. Around the beginning of the present decade the number of visitors began to recover, arriving, in 1995, 270 thousand visitors, with a growth of 4.5% annually, for the period 1991-95. (Table 3.3.1).
- 5.04.- According to estimates of the Honduran Institute of Tourism (HIT), the average stay in the country was 7 days in the Islands of the Bahia and of 4 days in other tourist areas of the country. This represents an average of 5.5 days stay in the country. The daily expense by visitor varies between US\$ 129 in the case of the USA tourists and US\$ 80 per day, in the case of the European and Central American tourists. The average rate of use of the installed capacity is estimated, for the main hotels, in 70 percent for 1995.(Table 3.3.1).

5.05.- The annual revenue in foreign exchange, according to the Central Bank of Honduras (BCH), reached 80 million dollars in 1995.

5.06.- In 1995 the percentile structure of the origin of the visitors to Honduras was.

USA 40.5%
 Central America 32.2%
 Europe 12.4%
 South America 4.2%
 Caribbean Islands 1.2%
 Mexico 2.8%
 Canada 3.1%
 Other 3.6%

5.07.- The more dynamic trend in the last years corresponds to the North American tourists (USA and Canada) and to those of European origin, reducing the importance of the visitors of the rest of Central America.

5.08.- The total offer of hotels, in 1995, reached 405 hotels, with 10,022 rooms and 16,979 beds, in 4 categories. (Source HIT). However, a rapid investigation permitted to determine that only the hotels that the IHT qualified as first category are able to receive the international tourism and to compete at that level. In 1995 52 of these establishments existed, with 2,808 rooms and 5,600 available beds.

6.- Forecast of the Honduran tourism industry (1996-2000)

6.01.- The Secretary of Planning, Coordination and Budget (SECPLAN) and the HIT elaborated a document "The Tourism, An Alternative for the Sustainable Development of Honduras" , where it established a strategy for the development of tourism, through a series of policies, programs, high-priority projects for the sector and the quantitative goals to reach until the year 2010.

6.02.- The strategy of the tourism development is based on the development and

implementation of the following actions:

6.02.1.-Institutional Reorganization. In this point it included the formulation of a regulatory framework that facilitate the coordination of policies and the improvement of the mechanisms of interinstitutional coordination that aims to energize the tourism activity.

6.02.2.-Sustainable Development. The growth of the tourism sector must be carried out in a sustainable development framework, without altering the ecological or biological characteristics of the zones to be developed.

6.02.3.-New markets. The growth of the sector is directed basically to stimulate the development of the following new market segments:

- " Green Market " or ecological, considered as an independent market.
- Archeology market
- Market for divers
- Family market of long stay

6.02.4.-Infrastructure Support . Improvement and expansion of the highway network, especially toward the north coast of the country, in order to widen the sites offered for the attraction and recreation.

6.02.5.-Financing of the sector. Novel financing plans are sought, among them through joint ventures of the sector to be done with the foreign and national private sector.

6.02.6.-The Document also establishes some goals to be reached for the period 1995-2001:

Increase the number of visitors in 4.6% per year; the number of rooms in 8.4%; the income in foreign currency in 10.5%, and the expense by tourist in

5.7%. (Table 3.3.2)

D.- THE JAMAICAN TOURISM INDUSTRY

7.- The Jamaican Tourism Industry (1991-1995).

7.01.- The tourist industry has been important to Jamaica since the 1950's. In 1995 there were 1,147,000 stopover visitors and 605,200 cruise ship visitors, making a total of 1,752,200. This level of visitor arrivals makes the tourist industry extremely important to Jamaica, as a major foreign exchange earner and employer. In 1995 the tourism industry earned US\$969 million in foreign exchange. This represents an increase from US \$764 million in 1991. With a balance of trade deficit of US\$1.4 billion the industry plays a very important role in generating foreign exchange.

7.02.- In 1995 the industry directly employed 118,881 persons, 42,774 indirectly and generated another 135,255 jobs in the economy. This total of 270,864 represents a growth from the 196,194 persons employed in 1991. With a population base of 2.5 million the industry is clearly an important employer of labor.

Table 3.4.1 Jamaica Tourist Industry Indicators 1991- 1995.

INDICATOR/YEAR	Unit	1991	1992	1993	1994	1995
Foreign Exchange Earnings	US\$(Mill.)	764	858	942	919	969.0
Visitor Arrivals: Stop Over	Thousands	1,006.8	1,057.1	1,105.4	1,108.9	1,147.0
Visitor Arrivals: Cruise Ships	Thousands	490.5	649.5	629.6	595.6	605.2
TOTAL VISITORS	Thousands	1,497.0	1,706.6	1,850.4	1,704.5	1,752.2
Hotel Rooms	Units	11,423	12,189	12,643	13,080	13,742
Other Rooms	Units	5,914	6,402	6,292	6,680	6,928
TOTAL ROOMS	Units	17,337	18,591	18,935	19,760	20,670
Occupancy Rate	Percent	57.9	60.1	60.3	57.3	60.8

A c c o m m o d a t i o n Employment	FTE (1)	22,788	25,466	26,030	28,410	31,154
Other Direct Employment (2)	FTE	43,181	46,244	73,298	80,000	87,727
Indirect Employment (2)	FTE	31,289	34,966	35,740	39,008	42,774
Induced Employment (2)	FTE	98,936	110,563	113,012	123,446	135,255
TOTAL EMPLOYMENT	FTE	196,194	217,239	248,071	270,864	296,910

Sources and Definitions

All statistics are from the Jamaica Tourist Board unless otherwise stated.

- (1) FTE:- Full Time Equivalent Jobs (Definition)
- (2) Economic Impact of Tourism in Jamaica 1992: OAS :-1994 .

8.- Forecast of the Jamaican tourism industry (1996-2000).

- 8.01.- The Government's NIP identified the tourism industry as a major linchpin of economic development over the next few years. The policy seeks to encourage the growth of over 6% per annum for the industry. This will translate, in the year 2000, to 383,000 direct, indirect and induced jobs and foreign exchange earnings of US\$1.375 billion.
- 8.02.- There will be major benefits to the various sectors that support the industry if these targets can be achieved. To achieve this growth there will have to be significant investment in hotel rooms, air and sea transport facilities, attractions, sewage and water supplies, housing for employees in the resort areas etc. During the construction periods there will be significant amounts of construction labor needed. Suppliers to the industry can also expect significant growth in their business.
- 8.03.- Hotels must be competitive on an international basis for the industry to prosper and grow in the long term. High interest rates and poor infrastructure are major deterrents to the establishment of manufacturing in Jamaica as costs are too high.
- 8.04.- Distributors of imported products have benefited from the recent revaluation of the Jamaican Dollar at the expense of local manufacturers. Macro Economic Stability is a necessary condition for investment as it provides a predictable platform from which investors can plan.

CHAPTER III**INDUSTRIES THAT SUPPLY THE TOURISM INDUSTRY IN BELIZE, CUBA,
HONDURAS AND JAMAICA****A.- ACTUAL SITUATION.**

- 1.01.- An examination of the products used by the tourism industry revealed that local products and those imported from within and from outside the region are the same as the ones used by the general population. What may differ is the presentation. The packaging industry will have to be developed, to be able to manufacture for the particular needs of the tourism industry, in particular if the food processing and personal care products want to penetrate more in this market.
- 1.02.- For the investigation in the four countries the following steps were followed: The questionnaires provided were faxed or presented in person, to tourist enterprises, distributors and manufacturers, prior to the interview, because of the extensive amount of information required. Appointments were subsequently made and face to face interviews were conducted with the relevant parties to obtain the information on the questionnaire. Official government statistics on imports, exports and production were used to estimate the Apparent National Consumption (ANC) of products used in the sector.
- 1.03.- The consumption and production of the products used by the industry were examined and a number of recommendations were made as to potential products for manufacture. The requirement to be internationally competitive limited the range of products that could be competitively manufactured in the countries of the region.
- 1.04.- The four studies made by the national consultants showed that the country with the most integrated industry is Jamaica. However, during the visit to Kingston we received information that some industries are moving to Trinidad, because the industrial climate provided by the government is better there. Also we received information that the same is happening in Costa Rica. For this

reason it is proposed to include Trinidad and Costa Rica in the second phase of the Project.

- 1.05.- The studies of the national consultants of Honduras and Jamaica were the more comprehensive to cover the required subjects, as a consequence they are the most mentioned as basis of this report.
- 1.06.- The lack of adequate production statistics and of interest to answer the questionnaires by many of the private people interviewed in the four countries, made the work of the national experts difficult. The questionnaires will therefore be adjusted to the reduced list of industries proposed for phase 2 of The Project. Another questionnaire will be prepared for the suppliers of inputs, in the countries which already have factories that produce them.

B.- STATISTICAL AND INFORMATION LIMITATIONS.

- 1.- As mentioned before, the products used by the tourism industry are not different from the products used by the country as a whole. The hotel and institutional trade prefer products in an institutional package size e.g. jams and butter in a portion pack size, soaps in a small size, and some food and other products in sizes much larger than those used in households. The external trade and production statistics does not publish statistics on an item by size, so it is practically impossible, within the scope of this study, to desegregate the information for some products and to separately identify those used by the tourism sector from the rest of the economy. For each category of products there is a section "Not Elsewhere Specified". The numbers in these categories are large enough to make the analysis more difficult.
- 2.- As previously mentioned, the local production statistics are limited. Production of many categories are not tracked so the method to determine Apparent National Consumption, as is estimated internationally, could not be applied for many of the products used in the tourism industry. The products for which statistics are kept are often not detailed regarding its size or presentation. For example, edible fats and oils are tracked as two categories and not as the many

types of each that are used in the trade. This is important as equipment to manufacture and pack each different type is often different.

- 3.- The units of measurement may vary according to the source of the information. Cigarettes and cigars are recorded as thousand units in the production statistics and as KG in the foreign trade statistics. In the case of alcoholic beverages the statistics do not record the strength, just the weight or the size of the immediate container.
- 4.- Private Sector Associations in Belize, Honduras and Jamaica do not keep production statistics of their members. The government's statistics could not therefore be improved with more information.
- 5.- There are many products available in the domestic markets of three countries, for sale to the population at large and to the tourism industry, for which production data is not available. The consumption for these products are therefore understated by the level of local production.

C.- MACROECONOMIC FACTORS AFFECTING THE DEVELOPMENT OF INDUSTRIES IN THE CARIBBEAN BASIN.

- 1.- The globalization of the economy, together with the neo-liberal policies followed by the majority of the countries of the region, including the liberalization of imports, have caused a very difficult situation for the subsistence and development of industries in many of the countries of the Caribbean Basin.
- 2.- So, there is a negative feeling to the manufacturing sector as a profitable investment at this time. Interest rates are high and combined with the long cycles involved in manufacturing, make the financing of working capital an expensive proposition.
- 3.- Some multinationals, with the opening of the economies, decided to locate their productions in function of world sourcing and their decision to produce

could be directed towards big plants they already own in other countries. In the case of domestic industries, some firms have closed all or part of their facilities and are now sourcing the products from other countries. For example, many Jamaican manufacturing operations have closed their factories in Jamaica or have stopped production of certain items and shifted production overseas. Seprod recently closed its soap and detergent plant, sold the brands to Colgate Palmolive, who now manufacture the products in Barbados and Dominica, for sale in Jamaica and other markets in the region.

- 4.- With the globalization of trade, the relaxation in trade barriers and foreign exchange restrictions and the diminution of import duties, companies now find it easier to import products from the most inexpensive source. Nothing is wrong with this, as business people will behave rationally and take the necessary actions to increase their profitability and cash flow.
- 5.- The questionnaires also helped to detect, in the case of Jamaica, that poor transportation for workers, which along with the crime situation, makes the operation of multiple shifts difficult and expensive. When to this situation high energy costs and high interest rates are added, the prospects to establish new industries or expand the ones already existing are reduced. On the contrary, as was mentioned in the interviews, in the case of Trinidad, for example, it is possible to manufacture a number of products and sell to Jamaica at a CIF price of, in some cases, more than twenty percent lower than manufacturing in Jamaica.
- 6.- Additionally, an overvalued currency makes imports more inexpensive than comparable locally manufactured products. This situation has occurred in some countries of the region for several years, with negative effects in the development of the industry.
- 7.- To promote the expansion of the manufacturing sector to account for higher percentages of GDP it is necessary to have an outline of the Macro Economic environment of the countries. Even with Macro Economic stability there will have to be a significant period of stability before the investor, national or

foreigner, will be convinced that investment in manufacturing is a good one for the long run.

D.- COMMENTS ON THE SELECTED INDUSTRIES

- 1.- The hotel industry must be competitive on an international basis to prosper in the long term. Guests are mostly from the developed countries and expect to receive world class service and good value for their money spent on a vacation. The quality of goods served to the guests is, therefore, extremely important. In order to be internationally competitive hotels and cruises are very aggressive in their purchasing methods. Larger hotels and cruises continuously compare international prices with those offered by local purveyors to the industry and where the foreign products are more economical, the tourism industry will import or buy directly from some other countries, excluding the local manufacturers and distribution chain.

- 2.- As a result of the four country studies, the industries that supply the tourism industry, that were selected to form part of the Project, have been divided in four categories:
 - a) Industries that supply only the domestic market, and in which the tourism industry represents a small percentage of the total demand, or in which the tourist demand is oriented to high quality or special brands that for the small volume of the demand do not justify the local production;
 - b) Industries that, to be economically feasible, need to supply several countries of the region;
 - c) Industries that, to be internationally competitive need to export to the region and to third markets, and
 - d) Manufactured inputs required by the three types of industries above mentioned, that are or could be produced in some country(ies) of the Caribbean Basin.

- 3.- The industries classified in each one of this categories, and the reason of its classification are explained in the following sections.(Note.- In Annexes 4 to 9 appear the country data provided by the national consultants. In Annex 10 it is presented a consolidated statement for the four countries, using the latest information provided.)

1.-Industries that supply only the domestic market, and in which the tourism industry represents a small percentage of the total demand.

1.1 Meat Industry

There are large amounts of chicken, beef, mutton, pork, fish and shellfish used by the domestic and tourism industry. All of these items are locally produced in the four countries of the sample. Honduras exports around 30% of its meat production, mostly to the US. Belize has the biggest dependence on import products, on the other three countries there are imports to supplement local production. The amounts imported varies from product to product, in a range of 8%.

1.1.1 Chicken

In Cuba there are small imports from Canada, mostly in cut pieces. Honduras is self sufficient. Jamaica produces most of its chicken requirements and there are some imports from the USA. The largest Jamaican broiler producer, Jamaica Broilers Ltd., has as one of its objectives to become internationally competitive. Cost reduction is an obvious strategy in achieving this objective. The company is now researching local carbohydrate replacement for corn as a way to reduce feed costs, which account for over 50% production costs. Further investments in efficiencies are planned prior to investments in expanding production.

1.1.2 Beef

Honduras export 30% of its beef production to the US. Belize has the biggest dependence on imports. Cuba has made some imports, in specialized cuts, from Holland. Jamaica produces most of the beef consumed; however, there are some

imports of high quality cuts for use in hotels, high class restaurants (serving the local and tourist trade) and households in the higher socio economic groupings. Beef is imported from the USA.

1.1.3 Mutton

Production and of both sheep and goat mutton is increasing in Jamaica. Goat is primarily consumed by the local market and lamb by the tourist trade. There are significant imports of lamb, most of which originate from Australia and New Zealand. Goat meat production is greatly underestimated as many households, particularly rural, raise goats and slaughter these at home for use within the household with some sales to neighbors. These are not captured in the statistics. The rest of the countries do not consume these types of meat.

1.1.4 Pork

The four countries produce almost all its requirements of this type of meat. However, Jamaica imports some of its requirements for pork from the USA. The local production is eaten as fresh pork or is used to produce ham, bacon and sausages.

1.1.5 Fish

Cuba is self-sufficient in these type of products and even export some of them, like shrimp and lobster. Between marine fishing and the fast developing fish (tilapia) farming industry, Jamaica supplies a major part of its needs. However, there are some imports from the Caribbean region. There are some specific fish types that are imported from outside the region e.g. mackerel, salmon, cod, tuna etc. Frozen mackerel is imported from the region and outside to produce salted mackerel an important part of the local cuisine. Shrimp is imported from the region, mainly Guyana and Belize to supplement local production.

There is planned expansion of fish farming and there is some research and development work being undertaken in growing fresh water lobsters in the same ponds as the tilapia, as the relationship is symbiotic.

1.1.6 General Comments on the Meat Industry

To process the meat products above in the region, there must be significant agricultural investment in the production of these animals to produce the raw materials at a competitive price to the processing facilities. The local availability of grain or other vegetable products for the carbohydrate input of the feed and other animal feed ingredients are and will continue to be important factors in producing these products competitively. Some research is being done in this area in an attempt to reduce feed costs, which in the poultry industry, accounts for 55% of production costs. Co-operation between the UNIDO and the FAO is absolutely necessary for the integrated development of the meat processing industry.

1.2 Dairy products

In the four countries of the sample there is insufficient production to supply the local needs. Milk solids are imported from Europe, North America and New Zealand in vast quantities to meet local demand for milk products. The milk powder is reconstituted to make liquid milk and a variety of dairy products. It is also repackaged in smaller sachets and used by households as a substitute for fresh milk. Adding the milk equivalent of imported butter and cheese makes the situation worse. The ability to produce milk at a competitive price is compounded by the high levels of subsidies enjoyed by farmers in the exporting countries, the high cost of production in the domestic markets and in the case of Jamaica, the lack of enough available land, suitable for dairying. High energy costs also makes irrigation water very expensive. A similar comment to the one made under the poultry section on the ability to produce feeds at a low price is also relevant here.

It is convenient to mention that Barbados Dairy Industries Ltd. that operates out of Widely, Barbados is supplying, at least eight cruises, with dairy products and pasteurized fruit juices. It is an experience to be followed.

It is unlikely that there will be any expansion in milk production until the subsidies are removed by developed countries on the export of surplus milk products. It is doubtful if the region has a comparative advantage in the production of milk to

support a broad based dairy industry. Guyana and Belize and other Latin American countries have vast areas of arable land that if put into the dairy industry, could possibly, make the industry as a supplier of milk solids and perhaps value added products viable in the region. Again a cooperative and integrated approach between UNIDO and the FAO is absolutely necessary if secondary and tertiary dairy processing is to develop regionally.

1.3 Local Processing of Cereals

Belize is highly dependent on imports of these products (17 million US dollars); Cuba is self-sufficient; Honduras required imports of raw rice in 1995 (14 million US dollars), and in the case of Jamaica wheat is imported from the USA, Canada and made into flour locally. Although some special grades of flour, with limited demand, is imported, the country is basically self sufficient in flour.

Rice and oats are processed in Jamaica. Paddy rice is imported and processed in Jamaica and this is supplemented by imported of finished rice from the region and outside, Oats, from extra regional sources is processed in Jamaica from imported raw material. Some of the oats imported is used to feed race horses and this can not be separated from the general trade statistics.

1.4 Bakery Products

In the four countries of the sample many hotels have in house bakeries to produce their own pastries and some specialized products. Bread and biscuits are purchased from the local bakery trade. The tourism industry is a major user of bread and other baked products, as well as pasta..

1.5 Corn Processing

This activity was only reported in Jamaica. Cornmeal and grits are produced locally from imported corn. Cornmeal is used in relatively small amounts to bake in the industry. Grits is used in beer manufacturing, of which the tourism industry is a significant user, and in the manufacture of snack foods. Apart from this corn products

are not important in Jamaica as in some Latin American countries.

1.6. Beverages

1.6.1 Beer & other Brewed Products

Cuba, Honduras and Jamaica report local production. The tourism industry gets its main supply from the domestic producers. There are some beer imports from the US, UK, Germany, Mexico and CARICOM for the tourism industry, as some guests demand their domestic beer and the hotels attempt to meet consumer requirements.

1.6.2 Carbonated Beverages

In the four countries there is production of carbonated beverages. Honduras reports an import of 3.5% of its ANC. In the case of Jamaica, the major multinational brands are manufactured in Jamaica and Trinidad for the Jamaican market. Carbonated beverages for the hotels are mostly supplied in the post-mix form. This is the most economical form for them. Smaller hotels use product in the glass and plastic bottles. There are no imports of post-mix products, as the logistics of transporting the empty reusable containers overseas is expensive.

There are large volumes of imports of carbonated beverages in plastic (PET) bottles from Trinidad. The PET bottle segment of the market is growing because of the convenience factor. A local plant to manufacture sodas in PET has recently opened.

1.6.3 Mineral Water

In Honduras there are six producers of purified water. In Jamaica the mineral water industry is small but growing rapidly in the tourism sector, because of fears of tap water quality by visitors. Bottled water is also a popular beverage in the metropolitan markets where the tourists originate from. While there are four local manufacturing facilities, the imports of popular metropolitan brands are growing at a much faster rate than the locally produced product. There are high quality springs in Jamaica that could be developed to serve the tourism and export trade. However, this will be

dependent on the development of the local plastic packaging industry, as PET bottles that are needed have to be imported.

1.7 Leather products.

It was reported that the tourism industry does not require products from this industry. However, there is a tannery in Jamaica that manufactures leather from cow and goat skins. The quality of the leather made from local hides lacks quality. Some skins are imported from the USA to supplement local availability of hides. The leather is used by shoe, bag, curio and gift item manufacturers. There are sales of gift items like leather key rings to tourist gift shops.

With the potential to increase local beef production to meet the demand, the concurrently development of the leather industry must be seriously considered in Jamaica.

1.8 Shoe Industry

1.8.1 Leather Shoes

The tourist industry does not purchase shoes directly. However, their staff generally has to adhere to a dress code and purchase shoes from local retailers. In the case of Cuba and Honduras the supply comes from local factories. Belize imports 1.1 million US dollars and in Jamaica the shoes are both of local and imported origin with the imported shoes coming from Spain, Brazil, Italy, and the USA, via distributors in Panama, the USA and Curacao.

1.9 Garment Manufacturing

In the four countries there is a garment industry. In Belize and Cuba its production is for the domestic market, while in Honduras and Jamaica there is an extremely well developed garment manufacturing industry. Much of the production in Honduras and Jamaica is for export and there are large factories working in freezones, under in-bond mechanisms and so called 807 manufacturers, that produce exclusively for export. The

raw material is imported as cut parts to be sewn locally or as fabric. These enterprises can not, by law in both countries, sell their production on the local market. However, it is ironic that these very products often find their way back into the domestic markets via distributors and wholesalers in Miami, New York and Panama. There is also much production for the local market but imports of some items are high. In Honduras imports represent 27% of the NAC.

The tourist industry uses garments for uniforms and for souvenir items such as tee shirts, batik etc. These are almost exclusively purchased locally. Some of the larger hotels import fabric for uniforms and contract with local factories to make uniforms for their staff. This fabric will often have the hotels' logo printed on waved into the fabric or will be of a special design. Other hotels will purchase stock items from factories specializing in uniforms, while others will contract with factories to make special designs for them with material supplied by the manufacturers.

The souvenir type items can be divided into small craft type manufacturers and the larger operations. The smaller operators will purchase fabric locally from wholesalers, manufacture their product and sell to the gift shops. Some will purchase plain tee shirts and print designs on them. The larger outfits will import fabric and manufacture and print the design. The other specialized garments for the tourist industry follow a similar pattern.

The fabric for the garment industry comes from local factories in Cuba, Honduras and Jamaica. In Belize, Honduras and Jamaica it is complemented with imports. These imports are from the USA and the Far East. The Far East purchases are often made through agents or distributors in the USA. There are Belizean, Honduran and Jamaican wholesalers and distributors of fabrics, that operate bonded warehouses, offering fabric to the smaller manufacturer, that cannot afford purchase large quantities at a time.

Taking into account the Mexican experience, where the in-bond industries are allowed to sell a part of their production in the domestic market, paying only the duties of the imported inputs, it is recommended to suggest the Governments of Honduras and

Jamaica to permit their respective plants, to sell a portion of their garment production in the local market, paying duty only in the imported inputs. This will increase competition, improve the quality of the products sold to the consumers and will help the manufacturers of handicrafts to have cheaper and better inputs for their production.

In the second phase of the Project, the supply of yarns and fabrics, from some of the more advanced countries of the Caribbean Basin, has to be considered. In this respect, to supply the export industries that send their garments to the USA, the requisites of origin have to be taken into account.

1.10 Manufacturing and Repair of Furniture

In the four countries wooden furniture is purchased from local manufacturers, craftsmen or made by in house staff. Repairs are done by the craftsmen and the hotels' staff.

1.11 Printing Shops

In general, most printing needs in the four countries are met locally, but the tourist industry will source specialized promotional material for use in their overseas marketing campaigns from the USA, Canada, Mexico, or the UK. Honduras reports imports of 20% of its ANC.

1.12 Handicrafts.

In the four countries there is a wide production of Handicrafts, such as garments, woodcarving, pottery and others. In this area there is need to technical assistance to improve the quality and design, as well to promote more the cultural heritage of the Caribbean countries. Special efforts will have to be made in this sector. It is important, not only for the direct employment that it generates, but also for the indirect employment in the commerce that sells these type of products. The stopover visitors and the cruise visitors already buys important amount of these products, but the amount can be increased if the diversity, quality and design are improved.

2.- Industries that, to be economically feasible, require to supply several countries of the region;

2.1. Edible Oils and Fats

Honduras is the only country that exports vegetable oil made from the African palm (7% of its production); however it imports 15% of its ANC, mostly in olive and corn oil. Belize imports all its needs. Cuba imports raw and processed oil, the last one mostly for the tourism industry and is imported from Mexico. Jamaica imports these products, from and outside the region, with Trinidad being a major supplier.

2.2 Sawmill products, excluding furniture

Belize, Honduras and Jamaica have production of Lumber. Belize and Honduras produce hardwoods. Pine is produced in Honduras and Jamaica. In Jamaica the production of lumber has not recovered from the devastation of forests after hurricane Gilbert in 1988. Pine lumber is imported from the USA and Canada; cedar, mahogany and other exotic woods used are imported from Central and South America.

Plywood is imported from Guyana, Surinam, Brazil, the USA and Canada. Compressed fiberboard is imported from the USA, Brazil and Canada.

2.3 Packaging

The absence of a well developed packaging industry mitigates against the development of manufacturing for the tourist domestic and export markets. The local food processing industry is particularly adversely affected by the poor state of the packaging industry in the four countries. In general, the importation of packaging material is expensive and not always a feasible option.

2.3.1. Plastic

In the Jamaican market it was reported that plastic bottles, that are available locally, are limited in variety and mold designs are not modern. Small manufacturers have

great difficulty in justifying the purchasing of appropriate molds. The lack of local availability of PET bottles has users paying high premiums to import these bottles. This is limiting the development of the food processing sector. Plastic resins for the manufacture of the bottles are imported from outside the region, but PET bottles are manufactured in other countries of the Caribbean Basin.

2.3.2 Cans

In Cuba there is a factory to produce cans, but it requires updated technology, capital and raw materials. In Jamaica, for the products that have to be canned, the availability of appropriate size cans are a problem. The hotel industry purchases large volumes of locally manufactured juices in 540 ml cans. The hotels would prefer to purchase these items in 1.4L or 5L cans but these are unavailable locally. They can be imported but at uneconomical prices. The local can manufacturing plant will not invest in lines to produce these sizes unless the volume is guaranteed and the canneries will not invest in machinery to can those sizes unless the cans are available locally.

There is some importation of cans from Trinidad and Barbados, where the local can plant has affiliated companies. There is a small amount imported from the Dominican Republic.

Cuba and Jamaica need to import tin plated steel used in the can making process. In the case of Jamaica it is imported from the UK and Europe because of international purchasing arrangements with the France based parent company of the local can plant.

2.3.3. Cartons

Honduras produces all the requirements of paper products. They are producing from imported paper in big rolls. The availability of forest resources in Honduras justifies the study to establish a cellulose and paper factory.

In the Jamaican case corrugated cartons for packaging are available and these are of acceptable quality. The raw materials are imported from the USA and from Venezuela. The adhesives are purchased from overseas although there are two

adhesive manufacturing plants in Jamaica.

2.3.4. Labels

In the Jamaican case the printing industry has greatly improved over the past few years and most labels used are purchased locally. The areas that the Jamaican industry is weak in such as printing on metalized paper and on pressure sensitive rolls are not a major problem as these products can be imported competitively from Barbados and Trinidad. The paper is purchased from distributors in the USA and Canada.

2.4. Janitorial Type Products

The studies of Cuba, Honduras and Jamaica reported that cleaning and sanitizing janitorial type chemical products used by hotels are purchased locally. Most of these products are manufactured locally, but some are imported from CARICOM, the USA and Central America. A large volume product used by the industry is chlorine powder for swimming pool water treatment. This is imported from Europe and the USA and distributed by local chemical distribution firms. This is a product that can be supplied by some of the countries of the Caribbean Basin and this investigation has to be done in the second phase of the study.

2.5. Paints and Coatings

Paints and coatings used directly and indirectly through their suppliers are for the most part locally manufactured in three countries. The supply of inputs, that are imported could be supplied by several of the larger countries of the Caribbean Basin.

2.6 Detergents

Laundry detergents are purchased locally from hotel supply purveyors. Cuba, Honduras and Jamaica produce some of them and supplied to the domestic markets by the local chain of distributors. Other products are sourced from CARICOM countries, , Costa Rica, Mexico and the USA. The recent closure of the local soap and detergent manufacturing plant in Jamaica, will see the removal of this country as a

source of product in 1996 onwards. The supply of inputs for the local plants of detergents, by countries of the Caribbean Basin is a point to be included in the second phase of the Project.

2.7 Personal Care Products

Bath soaps, shampoo and personal care type products are purchased locally from local manufacturers, but in some cases these have to be imported because of international marketing agreements. In Jamaica there is a local manufacturer that specializes in manufacturing shampoos, and lotions in small packages, specifically for the hotel trade. Soaps are now imported, mainly from CARICOM, as the local soap manufacturing plant is now closed. Suntan products are usually brought with the tourist and there are some imports and local production.

2.8. Plastic Products

The tourist industry is a large user of plastic products. Plastic is used in shower curtains, pool and beach furniture, plastic bags, storage containers, microwave and food film, cups, drinking straws etc. There are many plastic souvenir type items sold in the tourist gift shops. Plastic bags, cups and drinking straws are manufactured locally and the other items are imported and sold through local distributors. A further integration of the industry is necessary, at the Caribbean level. This is also a matter to be included in the second phase of the Project.

2.9. Pottery

The tourism industry uses pottery for plants in interior decorating and in the landscaping of the hotel grounds. These are generally locally manufactured, although plastic pots for plants are becoming more evident. Sculptors generally sell some of their pottery type works in the stores catering to the industry. Assistance in design, improved technology and quality, through technical assistance, are points to be included as one of the services that can be provided by UNIDO.

3.- Industries which, to be internationally competitive, need to be produced for the local market, export to the region and to third markets.

3.1. Canned and Preserved Foods

This sector is wide in scope. While the external trade statistics are detailed, in many cases they do not separate the products by size. The tourism industry basically uses the same products as the domestic market, but in different sizes, making it difficult to separate the domestic and tourist usage. For example there are some imported jams and jellies used by the tourism industry in portion control sizes. Most of these same jams and jellies are produced for the domestic market, but only in bottles for the consumer trade. There are also many fresh products used directly by the tourist industry and by households that is used as a raw material by the food processing industry. This relates to both local and imported products. Some examples are local orange juice is purchased fresh and is also an integral ingredient in tropical fruit punch. Frozen vegetables are imported for sale in supermarkets, to hotels and as an ingredient in the local manufacturing of canned vegetables. Tomato paste is used in the tourist industry, households and as an ingredient in the food processing industry.

3.2. Sugar Industry

Sugar is a product of big importance for Belize, Cuba, Honduras and Jamaica, as they are exporters of the product. Honduras has an export quota, at preferential prices to the United States, and Belize and Jamaica export raw brown sugar to Europe, under the Lome treaty with the European Union, at special prices, that are higher than world market prices. Stocks from the local production is retained for local sale.

Refined sugar is imported from the US, Brazil, the UK and some Latin American countries at the lower world market price, to fill local needs.

In Jamaica there is significant packaging of sugar, mainly refined, in portion packs for the hospitality trade, but there are some imports of this item. A local sugar factory, as part of its development plan, will be renovating a mothballed refining plant and when complete will reduce the level of imports of refined sugar. It must be

recognized that this will reduce the amount of raw brown sugar available for export to Europe and the USA at preferential prices.

The support that UNIDO is giving to GEPLACEA can help to decide if there is something more to be done in this industry, in the Caribbean Basin.

3.4. Cocoa, Chocolate and Candy Products.

In Honduras and Jamaica locally grown cocoa is blended with imported product to manufacture chocolates and cocoa drinks locally. This is done to achieve the correct taste for the consumer. Some chocolates and cocoa drinks are imported from CARICOM, Europe, North America and Latin America. In each of these two countries there is a thriving cottage industry of manufacturing high quality chocolate specialty items for the up market trade and this includes the tourist trade.

With the recent closure of a large candy manufacturing facility in Jamaica the country and the tourist industry will become more dependent on imports.

Sources of imports of candy is widespread and from the region. Costa Rica, Trinidad, Venezuela and Colombia appear to be the largest suppliers. From outside the region Brazil and the traditional trading partners like the US, Canada and Europe are significant.

3.5. Other alcoholic beverages

Production statistics are kept on beer and stout, rum, other alcoholic beverages and carbonated beverages. The tourist industry uses large volumes of these products and most are locally produced. Imported products used by the tourist industry and the local population include wines, scotch whiskey and other specialized alcoholic beverages. There are some imports of beer for the tourist industry, as hotels strive for consumer satisfaction by providing their guests with some preferred imported brands. In Honduras there are some imports of Caribbean rum and scotch whiskey, wines and other alcoholic beverages from Europe. In Jamaica, there were some imports of brewed products and rum from Trinidad, Barbados and Guyana, but these have declined drastically in recent years.

3.5.1 Alcoholic Beverages

There is a well developed manufacturing sector for alcoholic beverages in Jamaica. Rum, with the exception of minor imports to supply guest requirements, is locally produced. Jamaica has a well developed export trade in rum. There is some bottling of liqueurs, gin, vodka and whiskey. Some of these are international brands bottled under license but there are large imports of these products. Wine is for the most part imported although there are some locally manufactured wines aimed at the lower end of the market. Larger hotels import some of these products directly circumventing the local distribution chain.

3.6. Tobacco Products

There are sophisticated cigarette and cigar manufacturing facilities in Cuba, Honduras and Jamaica with spare capacity. Tobacco is grown locally, but special varieties have been imported to blend with the local product, to get the right flavor. The three countries export large volumes of cigars and cigarettes, as the quality of their product is internationally recognized. The tourism industry buys locally these products. However, in the case of Jamaica there are imports of specific brands from Cuba (cigars) and cigarettes from the USA and CARICOM, to meet consumer tastes and requirements. Honduras only imports Burley tobacco, for mixtures with local tobacco.

3.7. Textile Products of Hard Fibers

There is not an important direct consumption of hard fiber products and its textiles in the tourism industry. However, the craft trade does significant volumes of hats and belts of local straw and thatch waded locally as a cottage industry, that are sold to the tourists, in Jamaica and Honduras.

3.8. Textile Products of Soft Fibers excluding Knitted

In three of the countries there are a few manufacturers of bed linens, tablecloths, napkins drapery and covers for furniture. Some of them do not manufacture the whole range, but will import to complement their production in order to offer a full line to

a hotel. The larger hotels will generally supply the textiles to the local manufacturers, who will manufacture the products to the hotels' specifications. In Honduras and Jamaica there are distributors and wholesalers of imported fabrics, that cater to local manufacturers. Larger manufacturers will purchase directly from overseas. The large hotels, as part of a their periodic renovations, will import directly if the quantities are large and cost savings can be achieved. Raw materials for the manufacture of these items are imported mainly from the USA and the Far East. In Cuba there are factories with spare capacity, that can be used to supply part of the Caribbean needs.

In terms of the craft type items in Honduras and Jamaica there is some cut -work and embroidery done on napkins and tablecloths, that are made from locally manufactured fabrics, or locally purchased imported fabrics and a few manufactures made from scratch and then decorated.

3.9. Carpets and other Textile Products of Soft Fibers.

There is some carpet production of a limited range in Jamaica, although this has been declining over the years. Most hotels in Belize, Cuba, Honduras and Jamaica import carpets through local agents or directly from the USA, Canada or Europe. Rugs are imported, although there is some cottage industry production.

3.10. Knitted Products

In Cuba there is production of towels. The factory has spare capacity to supply other markets. In Jamaica there is production of towels, on a small scale and there are imports; there are local distributors of the imported products but the hotels import directly if volumes and prices warrant it. Some beach towels are printed locally with Jamaican logos for the gift shop trade. In Honduras towels are imported from El Salvador, that has a modern plant and export them to several countries of the Caribbean region.

In Jamaica there is a thriving cottage industry manufacturing knitted belts, vests and tams from imported yarn to supply the tourist souvenir trade. Some distributors have been importing these from Guatemala to supplement local production. It appears that,

with some proper organization of production, there is potential for expansion of local production as the distribution systems to the gift shops are in place.

3.11. Plastic and Rubber Shoes

The tourist industry uses rubber and plastic shoes and slippers in the pool, beach water sports area of the industry. There is a growing market for a rubber reef walking shoe to protect swimmers from cuts and pricks from sea urchins. These are imported through distributor /wholesalers in The USA and Panama with the ultimate source often being the Far East.

Cheap plastic and rubber shoes are used by lower level tourist industry employees. These are generally imported from the Far East. Rubber water boots are used by hotel ground staff and are produced locally in Jamaica..

The production of rubber shoes, for reef walking and use in the pools is one activity that has to be considered for further study in the second phase of the Project. This article can be supplied also to the cruises, as their passenger can use this type of shoes by the pool, and when they may go to the beaches during the cruise. This is a large market to be explored.

3.12. Glass

Manufacturers in Jamaica pay at least 30% more than manufacturers in the UK for glass bottles used in the food processing industry. However, the local glass factory has started a development plan to upgrade their plant and become more efficient. Already the liquor industry is benefiting from this in the form of lower bottle prices and improved quality. One company who used to bottle in Jamaica for the Canadian and US markets stopped doing some years ago because of high packaging costs and uncertainty of supply. This company presently ships bulk rum to Canada and bottles there for sale in the US & Canada. This company is now investigating the feasibility of bottling again in Jamaica for these markets, because of the improvements at the local glass factory.

The silica used in the production of glass is locally produced, the soda ash is imported from Europe and the USA. There is some use of recycled glass in the manufacturing process but the recycling operation needs to become more organized to bring in more recycled glass to the factory.

There are other glass producers in the Caribbean region, that can supply also the needs of this product. This is a product that has to be included in the second phase of the project. Due to the recent developments in the bottling industry, the case of the glass bottles has to be considered together with the PET bottles. Some companies in the region already manufacture one or the two products.

3.13. Manufacturing of cellulose, paper and its products.

Cellulose and paper is generally imported for the countries of the Caribbean islands. In Mexico, Guatemala, Colombia and Venezuela already exist plants that could supply the regional needs. Another countries in Central America, like Honduras, could manufacture cellulose and paper. This is a sector that has to be included in the second phase of the Project.

In Cuba, Honduras and Jamaica processing to manufacture paper products, like sanitary type paper products are manufactured locally from a mix of recycled paper and imported bulk stock. While the imported products are purchased from local purveyors, some of the larger hotels will import container loads of toilet paper, hand towels and paper napkins directly from overseas distributors and wholesalers to achieve cost savings. There are imports from CARICOM, Central America and the USA. In general, there is spare capacity in the local manufacturing of paper products.

3.14. Chemical Products

3.14.1. Perfumes

The in bond trade is a large purchaser of perfumes, but these are generally of the multinational branded products. There are a few local perfumes sold through the gift shops.

3.14.2. Inks

The tourist industry does not use directly this product, but indirectly it is used through the printing shops. This sector uses locally produced inks, as well as imported ones. It is necessary to include, in the second phase of the project the availability of regional sourcing, with the existing plants or their expansion.

3.14.3. Matches

Matches are used by the hotels generally as a promotional item with the name of the enterprise and the logo printed on the cover. These are either purchased from the local manufacturers or are imported. There are a few companies that specialize in sourcing the hotels with imported products. It could be convenient to study the feasibility to supply this market with the already existing factories in the Caribbean Basin.

4.- Manufactured inputs required to produce the goods demanded by the tourism industry, that are or could be produced in some country(ies) of the Caribbean Basin.

According to the Country reports, the inputs required by the industries established in each country are the following:

4.1. Belize

Belize did not present any list of required inputs.

4.2. Cuba:

Inputs for fabrics: cotton fiber, artificial and synthetic fibers, threads, and colorings..

Garments: Fabrics, threads, buttons and zippers

Shoe manufacturing: Hides, sole leather, heels and laces.

Synthetic and Artificial Fibers

Furniture manufacturing and repair: Wood, rattan and polyurethane

Mattresses: springs

Printing and publishing: paper, inks, films

Paintings: Vinyl emulsions, Epoxy resins, derivatives of the cellulose, xilol, organic pigments, glycerin, ftalic anhydride, chemical additives.

Pottery and ceramic: ball clay, potassium feldespath

Tiles: ball clay, potassium feldespath

4.3. Honduras:

Canned and preserved foods: peaches, apples and other fruits of temperate zone.

Fabrics: cotton fiber

Bed linen, bed spreads, table linen, drapes: Fabrics of high quality.

Paper products: cellulose

Chemical products: PVC, polystyrene and other petrochemical products used to manufacture plastic trays and cups.

4.4. Jamaica:

The study, as was presented, does not allow us to make a clear definition of the inputs. There are also inconstancies, which made the interpretation of the figures difficult. For example, in table 3 (National production), in many items the note: "Production, but no data" appears. In Table 4 the data for the Apparent National Consumption are given however, it is not clear how these figures were arrived at.

Additionally, the figures of the ANC of Tables 4 and 6 are the same used in tables 7, 8, 9 and 10, even though the first ones are referred to as products imported from the Caribbean and the last two to as the products imported from the rest of the world. If there are no figures of production or detailed listing of imports and exports, it is not possible to determine, with the information provided, the products and the amount that may be used as basis for further study in phase 2 of The Project.

4.5. General observations

The four national consultants stated that there is not enough information, either in the government or in the private sector and also that there was resistance in answering the questionnaires. It is expected that in the second phase, with a narrow list of products

the questionnaires will be narrower and the objectives for each sector more specific.

5.- Other relevant findings from the questionnaires.

It must be noted that the products of the sample used by the tourist industry, with a few exceptions, e.g. souvenir type items, are the same as what is consumed by the local population. What will differ in most cases is the size and type of packaging.

5.1. Lack of competitiveness or quality of the domestic products.

Most hotels expressed a preference to purchase locally manufactured products whenever possible. Additionally they prefer to purchase imported products from local firm, rather than import themselves. Vendors are screened for quality prior to purchase and those who do not meet the strict quality standards are eliminated. Distributors and manufacturers complain that hotels pay bottom dollar for their products and want the best quality. However, the hotels generally purchase in large volumes and feel that the prices they demand are warranted. The larger hotels also have the capability of directly importing from overseas, wholesalers giving them leverage in negotiating prices.

5.2. Labor

The hotel industry has less than 2% of employees as expatriates. These persons are at the top management and technical levels. There is some level of training of local staff to replace expatriates in the medium to long term. There is a notion that an unusually large percentage of these expatriates end up as permanent resident on the Caribbean region. Programs established in several countries of the Caribbean Basin, as the programs in Jamaica, at The UWI and The University of Technology are providing most of the management needs of the industry; Cuba and Mexico have also similar programs, but the output of graduates will have to be expanded, to keep pace with the needs of the industry.

At the lower level it is required the promotion of training courses for the tourism workers, using, among others, extensive on the job training of staff. One of major

problem faced by the hotels, in Honduras and Jamaica is punctuality and absenteeism. The Honduran study explains that the cost of labor in Honduras, in the manufacturing and tourist sector, is below the other Central American countries and from some Caribbean countries, but that this is due to lower training and education of workers.

5.3. Infrastructure

In respect of infrastructure the perception was that the four countries have excellent air links, sea transportation facilities and links in telecommunications.

Electricity supply was seen to be improving, but the cost of electricity, in some of the countries, was seen to be high. Water and sewage were viewed as poor, and this could affect the environment and the future development of the tourism industry. Plants for water treatment and the chemical products and the machinery needed for this purpose could be included in the second phase of the Project.

Overland transportation in Belize, Honduras and Jamaica were viewed as being poor. In Jamaica crime and security were also mentioned as problems.

5.4 Fiscal, Financial and Credit

In Cuba, Honduras and Jamaica there are incentives for development of the tourism activity. However, in the Jamaican case, it was generally felt that the activity is overtaxed, development funds are available at internationally competitive interest rates for long term projects that will earn foreign exchange. These are readily available for the tourist industry. It is more difficult for manufacturers to access these funds. It was felt that more could be done in terms of preferential interest rates to the productive sector.

In the four countries there are no incentives to attract investment into the manufacturing sector. The only country that has a National Industrial Policy is Jamaica, without establishing concrete incentives. Cuba is preparing a long term plan, but it will be ready until 1997.

5.5. Market

As previously mentioned, in the four countries, the main market for the products of the manufacturing sector and for the distributors is the domestic market. The tourism market represents between the 1.5% to the 6% of the total sales. This situation establishes a framework for the measures and promotions to be taken in the second phase of the Project.

Usually, the tourist sector demands the same products required by the medium-upper income class and high income class. So, their demand is covered, with national or imported product, in the same pattern used by the nationals. The exceptions are for some hotels related to multinational operators, in which they may prefer foreign products, because worldwide contracts or due to lower prices obtained in the big volumes of acquisition by the head office.

The cruise market is a different one, as they have centralized decisions of acquisition and usually require to be supplied in their main ports of call. There are some exemptions that confirm the general rule. Distributors and brokers concentrate the supply to the cruise industry. As a consequence a different strategy has to be designed to manufacture and supply for them.

In three of the countries the market is now open to imports and all distributors are scouring the globe to find new sources that are competitively priced. These products compete with local products and in many cases are much more competitive in price and the quality is good. Some distributors have exclusive contracts to distribute the brands of major multinationals and hence are tied to a particular supplier. Others are free to find the most inexpensive products to compete in a particular category.

Marketing efforts, in particular the persistent, regular and professional calls by sales representatives and support from the Sales and Marketing Management of the purveyors are the most important steps in developing a relationship with the tourist sector. This modus operandi is similar to the marketing of goods in general.

5.6. Distribution

The most successful suppliers to the sector have a well developed distribution system. Hotels, in particular, run a just in time delivery system. They have particular days for receiving goods and deviation from this can lead to stock outs at the hotels and guest inconvenience and dissatisfaction. Small manufacturers who can not service the hotels effectively must use an efficient distributor to effectively compete in the hotels. A number of smaller manufacturers appeared unwilling to relinquish some margin to a distributor to service the hotel sector. Association of producers, working with common standards, and subcontracting can be of use to this purpose.

5.7. Technology

The major problem reported by Cuban and Jamaican manufacturers, with few exceptions, is the old equipment used in their factories. The technology being used is often greater than 30 years old and the equipment is generally inefficient and unreliable and leads to high production costs, that affect the entire population, not just the tourist activity. In the Jamaican case, the opening of the economy, makes the local production susceptible to price of imports from overseas. This is even more critical as Jamaican hotel chains and distributors have identified inexpensive sources of whatever there is to trade in. There needs to be a major revision of industrial incentives for manufacturing and an aggressive factory modernization program. The incentives must also encourage the use of new and appropriate technology as a part of the factory up-grading program.

6. Reasons why Products manufactured in the Caribbean Region are Consumed by the tourism industry.

Caribbean Products are consumed because they offer value for the money. Additionally, a number of multinationals have selected Trinidad, Costa Rica and other countries, as a manufacturing base for the Caribbean. As a result products are supplied from there. In the case of Belize and Jamaica the products of CARICOM receive a special import duty treatment. In Honduras the Central American products also attract of lower import duties. In these cases the preferential treatments may encourage buying in the producing countries of the region, if the price, quality and delivery and transportation times correspond to the needs of the buyers.

7. Reasons why inputs from third countries are used.

In the four countries it was reported that the use of inputs from countries outside the Caribbean Basin was due to fact that there is no domestic production or because the quality is not the one required by the tourists, or the price of the imported products are lower. In some cases there is a combination of these factors.

8. Additional Suggestions

There was significant resistance from all the parties interviewed to the length of the questionnaire and the time taken to research the responses and complete the form. There were numerous complaints about this. Many persons outright refused to cooperate. The sample size was therefore smaller than desired.

The government statistics available were not in the form needed to provide accurate information as sizes of each product were not disaggregated and too many products were included in a category called "Not Elsewhere Specified". The study assumed that all countries were using the Harmonized System. This low level of availability of statistics is, possibly, a feature of some developing countries.

The Hotel managers, the manufacturers and the distributors gave some information regarding their expenditures, but, in general, were reluctant to give information about the details of income and profits.

Additionally, distributors were unwilling to provide information in a number of areas. For example, they would not provide the names of their suppliers, especially when they did not have a tight contract and felt that they were obtaining excellent prices and service.

It was recommend that future studies be conducted on a much smaller range of products. This will greatly reduce the time that businessmen have to spend from their busy schedule to fill out the questionnaire. Some kind of prior "Desk" research can be done to identify areas of greatest potential and used to narrow the parameters of the project.

Additionally, if the range of products are small the participants may be willing to give

information on the amount of each consume and this will allow to separate the tourism industry usage from the economy at large.

CONCLUSIONS AND RECOMMENDATIONS

A.- CONCLUSIONS

- 1.- Tourism is one of the most important sectors of the economies of all countries in the Caribbean Basin and a major foreign exchange earner. Much work, therefore, must be done to promote linkages within the manufacturing industry and the tourism industry. The Project aims to address the supply of manufactured products to the tourism industry located in the Caribbean Basin. The Caribbean Basin includes the 29 Island Countries of the Caribbean, plus Mexico, Belize, the 5 Central American Countries, Panama, Colombia and Venezuela. However, from the 29 island countries only 10 receive more than 250 thousand visitors per year and have an industry that can provide some of the needs of the tourism industry. This reduces the total countries to be involved in the second phase to 20.
- 2.- The growth and development of the tourism industry in the region and its expansion, in the foreseeable future, makes it necessary to promote the establishment, improvement or the expansion of industrial activities that supply the tourism industry.
- 3.- The scope of The Project aims to include, in its final results, the form in which the selected industries can be either established or expanded, whatever the case may be, as well as the industries related to the production of the necessary inputs. In all the cases the aim is that the industrial enterprises of the region will supply the needs of the countries that form part of the Caribbean Basin.
- 4.- The tourism in the Caribbean Basin is composed of two sectors: stopover tourists, which in 1995 were around 14.2 million in the Caribbean Islands; 20.2 million to Mexico; 2.5 million to Central America and Panama, and 1.9 million to Colombia and Venezuela. The cruise visitors, according to the Caribbean Tourism Organization, were 7.9 million passenger visits in 1994 to the Caribbean Island Countries and the ports of Cozumel and Cancun in Mexico. Each one of

these two sectors, even though they require the supply of similar goods for its daily operation, the form of acquisition, distribution and supply is different.

- 5.- In the case of the supply to the cruise ships, a study of the Florida-Caribbean Cruise Association established that, in 1995, there were 7.9 million passenger visits to the Caribbean, and that a passenger on a 7 day cruise, with an industry average of 3.5 port destinations per cruise, would spend approximately US\$434 at ports during the trip. Of this figure 61% corresponds to shopping, 13% to food, and 7% in attractions, as the most important items. Shopping is mostly related with duty free sales, which are not relevant for locally manufactured products. If at the last two items it is added a 7% of the shopping that is spent in locally manufactured products, a figure of US\$ 980 million is obtained, as the actual expenditure of this type of tourism to the region.
- 6.- In the case of hotels, according to a study realized by the Organization of American States together with the Government of Jamaica, using the input-output table of 1977, with limited updating, from the value added in the tourism industry 50% is accommodation, 6% is food and beverages, 9% is entertainment, 7% is shopping and 38% are miscellaneous items. The World Tourism Organization recently finished a comprehensive study, together with the Central Bank of Dominican Republic, about the National accounts of tourism in that country. For the second phase of the Project it is necessary to have this document, as a reference for the goods consumed by the tourism industry.
- 7.- From these figures it is possible to see that tourism expenditure in food and beverage is between 6 and 13%, entertainment around 9% and other expenditures as maintenance, cleaning and toiletry and textile products are between 5 to 7%.
- 8.- The tourism income, in 1995, for the Countries of the Caribbean Island Countries was 12.5 billion US dollars; 6.2 billion for Mexico: 1.5 billion for Central America, and 1.3 billion for Colombia and Venezuela. The total of 21.5 billion US dollars, allows us to estimate that 1.7 billion US dollars were spent on food and beverages, and 1.9 billion on handicrafts and assorted products. This is the total market for the 39 countries, in the tourism spots located in the region.

- 9.- With the exception of some hotel chains, that operate according to the rules established by its headquarters, the rest buy inputs in the local market, using the local distributors that supply the national or imported products, through the same channels used to supply the middle and upper classes of each of the countries mentioned.
- 10.- The Project has the following positive aspects: the growing importance of tourism for the countries of the region; the existence of industries that supply one or more domestic markets, as well as the production of the necessary inputs required by the industries of the Caribbean region.
- 11.-The main difficulties that the Project will have to face are: the big area that the Caribbean Basin covers, in which the land surface is very small, as is the size and population of the majority of the countries of the region; the insufficient maritime and air transportation links between them; the almost non existence of trade between the English speaking countries with the Spanish speaking; the high dependence of distributors to supply the tourism industry and the lack of capital and technology, in the majority of the countries.
- 12.- Additionally to promote new investments in the region, UNIDO, could increase its work in technical assistance, transfer of technology, joint ventures, strategic alliances and the organization of international fora of entrepreneurs of the region, to promote and facilitate regional sourcing of finished and intermediate goods for the tourism industry and its suppliers, as well as those consumed by the rest of the population.
- 13.- The national studies reveal that to promote international trade among the countries of the Caribbean Basin it is necessary to have good ports and transportation infrastructure, efficient highways, improve the skill of the labor force and the development of regional trading companies.

B.- PROPOSALS OF THE PROJECT

- 1.- For the group of industries which were selected for the first phase of the study, which depend more from the domestic market than from the tourism market, according to the results of the four national studies realized, it is proposed to organize regional seminars which will help them to increase their efficiency and competitiveness. These sectors are: Meat industries; dairy industries; processed and grinder of cereals; bakery products; corn processed products; repair of furniture; printing shops, publishing companies and related industries; pottery and tiles, and tobacco products. The objectives of the seminars will be to improve the quality of the products, promote technical alliances, promote the establishment of associations of producers, developing common standards, and foster design and technological centers.
- 2.- Include in the phase 2 of The Project only the following products: canned and preserved foods; chocolate and candy manufacturing; garments and manufactured textile products, such as: bed linens, tablecloths, napkins, towels and similar products); rubber and plastic shoes; packaging activities; furniture manufacturing; production of cellulose and paper products. janitorial type products; paints and coatings; personal care products, plastic products and the main products required to outfit the new hotels and refurbish existing ones. Additionally it is proposed to include the main manufactured inputs for these industries.
- 3.- The possibilities of supplying the cruise ship industry, with the products proposed in the previous paragraph, also will form part of the phase two of The Project, keeping in mind that it is necessary to use different approaches of sales and marketing.
- 4.- Include in the analysis of phase 2 of The Project the possibilities to use the already existing trading companies and wholesalers, to promote trade among the countries of the Caribbean Basin. This has been suggested, as a more efficient and fast form to operate. They will have to be approached, in order to make them part of The Project, obtain their participation in the development of the specific projects as shareholders and/or with long term contracts of acquisitions.

- 5.- Eliminate from The Project the following activities, for the low percentage of the demand that tourism activities represents: beverages, alcoholic and non alcoholic; leather products; leather shoes; edible oil and greases; sawmill products; sugar; textile products of hard fibers; textile products of soft fibers; knitted products; carpets. Also eliminate the inputs to produce them.
- 6.- Promote the formation of clusters of small and medium industries, in some of the countries of the region, to produce for their domestic market as well as to supply other countries of the region. That could be the case of processed agricultural products, personal care products, paints and coatings, etc.
- 7.- The association of Caribbean producers of specific products, could be achieved through the promotion of common standards and trademarks. This could be done without discontinuing the production of the trademarks already on the market. For this purpose it could be beneficial to organize entrepreneurial meetings, for specific branches of industries.
- 8.- Promote, with the governments of the countries of the region, the participation of the industries selected for the Phase 2 in the negotiations in CARICOM, as well as in the Central American Common Market, in order to facilitate the commercial exchange of these products. Additionally, for the same products, promote tariff reductions among the countries of the recently established Association of Caribbean countries. This would imply negotiations between CARICOM, the Central American Common Market and the Group of Colombia, Mexico and Venezuela.
- 9.- For the second phase of The Project it is necessary to have the cooperation of the World Tourism Organization; the Caribbean Tourism Organization; the Florida, Caribbean Cruise Association; and financial support to develop the projects from the International Financial Corporation of the World Bank and the Interamerican Development Bank.

RECOMMENDATIONS FOR THE SECOND PHASE

A.- To know the possibilities of supply of products manufactured in the Caribbean Basin.

- 1.- Use the available information in the data bank of UNIDO, related to production and any other aspect that may exist, for the products selected for phase 2, and for all the countries of the Caribbean Basin. Additionally complement this information with the one that may be available in the International Trade Center (ITC), in Geneva, for the corresponding foreign trade figures. With this information it would be possible to determine if it is necessary or not to elaborate the questionnaires and decide about the following stages.
- 2.- Prepare short questionnaires, to be applied to governments, associations of manufacturers, associations of hotels and tourism activities, and to big wholesalers. They will refer only to the selected industries for phase 2.
- 3.- Among the questions to be included, for the products chosen, are the following:
 - a) Is there production in the country of this product?;
 - b) How many producers do exist?;
 - c) Does the country have the necessary inputs to manufacture the product?;
 - d) Do you prefer to import the product?;
 - e) Why?;
 - f) What are the distribution channels to supply the domestic market?;
 - g) What are the channels to supply the tourism market?;
 - h) Would you be interested to participate in the production of some of these products?.
- 4.- The questionnaires will be applied by consultants contracted for this special task, for the countries where it is considered necessary. In every country they will have to apply at least four questionnaires. One to the Government, one to the Manufacturers Association, one to the Hotels Association and one to a big wholesaler or to the Association of Wholesalers. If they can apply more, for example one to the Ministry of Tourism and one to the Ministry of Economy, or its similar this could be very useful for the study. In the case of the private sector also it would be convenient to apply a questionnaire to the association of exporters, if it exists.

- 5.- The results would be coordinated and analyzed and the results will be presented to the sectorial experts in the head office of UNIDO, to have a review of the results and to enrich the proposals with their knowledge and expertise.
- 6.- Specific contacts will have to be made with the Florida, Caribbean Cruise Association and with the Cruise Lines International Association, its suppliers, and concessionaires, in order to determine the feasibility to supply this important market.

B.- To estimate the demand side.

- 1.- Spain has finished in 1996 an intersectorial study of the tourism economy for 1992 and Canada has also finished a similar job. In the Caribbean area, the World Tourism Organization recently finished a study, made jointly with the Central Bank of the Dominican Republic, that will be published shortly, and in the past years Jamaica made a similar study, with the support of the Organization of American States.

2.- Using these elements, the following methodology is proposed:

- a) Obtain the figures of the percentage of the tourism expenditure that is dedicated to the acquisition of the products selected for the phase 2 of The Project, in the four countries before mentioned.
- b) Use the average of the Spain and Canada figures as a benchmarking, and the Jamaican and Dominican Republic figures, as a description of the actual situation in the Caribbean countries.
- c) With this information, plus the expected number of tourists to visit the Caribbean region, plus the estimated expenditures that they will make, a projection of the demand will be made. A similar procedure will be applied to estimate the demand of the cruise ship sector, using for this purpose the information that could be obtained from them.

C.- PUTTING TOGETHER THE DEMAND AND SUPPLY.

- 1.- Once the possibilities to supply the products of phase 2 are known, when compared with the possible demand, it would be possible to decide the path to be followed. If the demand is satisfied mostly from imports it will justify the establishment or the increase in capacity for these industries, in the Caribbean Basin.
- 2.- The result of this analysis will be presented for review to the sectorial experts of UNIDO headquarters. Once this information is validated or reviewed, and the final study is approved, the results would be presented in a business forum for the region.
- 3.- With this proposed activities for phase 2, the expenditures could be reduced, as a significant part of the work could be done by UNIDO personnel.

D.- TIMETABLE TO COMPLETE THE PROJECT.

To complete The Project, the following procedures have to be followed and the suggested time schedule is as follows:

- 1.- Obtain from the databank of UNIDO all the information of the Country reviews, for the countries of the Caribbean Basin. Complement this information with the one existing in the International Trade Center (ITC) and with any other data bank of the United Nations that may have relevant information for the products included in phase 2, December, 1996.
- 2.- Prepare the questionnaires to: Governments, associations of manufacturers and exporters, associations of hoteliers, and associations of wholesalers, if it is consider necessary. January 1997.
- 3.- Apply the questionnaires. January - February, 1997. For this purpose four groups

have been formed:

- a) The Caribbean Islands of Antigua and Barbuda, Bahamas, Barbados, Bermudas, Haiti, and the Dominican Republic
- b) Costa Rica, El Salvador, Guatemala and Nicaragua
- c) Colombia, Guyana, Panama Trinidad and Tobago and Venezuela.
- d) Mexico.

The criteria used to select these countries are:

- i) To receive more than 250 thousand tourists per year and
- ii) To have an industrial platform, to be used as a basis.

Also it has to be remembered that UNIDO already has information about Belize, Cuba, Honduras and Jamaica. In total 20 countries will be asked for information for The Project. If some other country wishes to provide the information of the questionnaires, its participation will be welcomed.

- 4.- Consolidate the information of the questionnaires and the information available in the data banks mentioned in paragraph 1 above. February, 1997.
- 5.- Evaluate the results of the questionnaires and prepare estimates of the total supply of the region, for the selected products. February - March, 1997.
- 6.- Prepare the demand figures, with base in the studies of Spain, Canada, Dominican Republic and Jamaica. March, 1997.
- 7.- The reports of supply and demand, for the products selected for phase two will be analyzed by the sectorial areas of UNIDO. March - April, 1997.
- 8.- Prepare the final report. April, 1997.
- 9.- Presentation of the final Report to the office of the Director General and review, according to observations and comments made. May, 1997.
10. Presentation of the document to a business forum. June-July, 1997. For this

presentation there are two options:

- a) Organize a specific business forum by UNIDO. This will be done in one of the countries of the region.

- b) Use the Latin American Business forum that the Mexican government organizes every year in Cancun, to present the results of the Project. One session of the forum will be requested for this purpose and during the rest of the meeting a business table will be permanently opened for the entrepreneurs attending it. In this case it has to be negotiated that UNIDO will be able to invite to the forum specific entrepreneurs. In this year's business forum more than 250 entrepreneurs attended the meeting.

**E.- COORDINATION AND SUPPORT FROM OTHER INTERNATIONAL ORGANIZATIONS
AND ASSOCIATIONS**

In implementing the second phase of the project, it would be beneficial to have the support and cooperation of the World Tourism Organization, The Caribbean Tourism Organization and The Florida, Caribbean Association of cruise ships. Additionally, it would be useful to obtain the support to finance the specific industrial projects, from the Inter American Development Bank and from the International Finance Corporation of the World Bank.

ANEX 1

CALENDAR OF THE PROJECT:

This phase of The Project started the 3 of June, 1996, with the final preparation of the methodology for the survey to be carried out by the national experts and ended with the submission of this report, the 6 of November, 1996. The first meeting with the national experts started, in Kingston, Jamaica, on June 7 with an initial meeting with Miss Patricia Scott, UNIDO representative and Mr. Gilles Stevens, UCD in Jamaica. From June 10 to 14 it was carried out the introductory course for the national consultants, in the JAMPRO Headquarters, in Kingston, Jamaica. It included the different questionnaires, the methodology for applying them, the information to be obtained, a demonstration to apply them, with government and private entities and the various steps to be followed, until the presentation of the final report.

At the meeting it was established that the preliminary report has to be sent to UNIDO and to the international consultant the 8 of August. The date to review the reports was fixed from the 19 to the 21 of August. However, due to the delay of sending the preliminary reports, the meeting was postponed until the 16 and 17 of September, and until the summation of this report, only a revised version of the national consultants of Belize, Honduras and Jamaica have been received, without incorporating all the points that were requested in the review meeting.

THE TWO PHASES OF THE PROJECT:

- a) Phase I consisted of a fact-finding investigation of the characteristics of the demand and supply for selected industries and products (and production possibilities) in four countries of the region. The four countries were: Belize, Cuba, Honduras and Jamaica. The industries selected for the Project were: meat products; dairy products; food processing, alcoholic beverages, soft drinks, textiles and garments, leather, paper, furniture and wood products, hygiene-related products, paints and maintenance products, PVC, polystyrene and polyurethane products, chemical products used as inputs for these

industries and handicrafts.

- b) Phase II will expand the investigation to other countries of the larger Caribbean Basin, such as Mexico, Costa Rica, Trinidad & Tobago and Colombia or Venezuela, in order to verify, expand or eliminate some of the products that have been selected in Phase I.

DEVELOPMENT OF THE WORK

In terms of implementation of the Project, an international expert was recruited to direct the project, under the supervision of the UNIDO headquarters. A national consultant from each of the 4 countries was chosen to carry out the research and investigation. The national consultants met in Jamaica in June with the international expert and the UNIDO Headquarters personnel to:

- a) Understand the objective of the study, the questionnaires to be used, the information to be obtained, etc.
- b) Visit offices and officials from the public and private sectors in Jamaica conducting "mock" interviews to get a "feel" for the research and investigation and
- c) To interact with their colleagues in order to get a collective understanding of the exercise.

The national experts then returned to their respective countries to carry out the exercise and to prepare a report to send to UNIDO. The following time-table was agreed upon:

June 10 - 14, 1996	:	International experts and country consultants meet in Jamaica
June 17 - July 12, 1996	:	Country consultants carry out field research and investigation
July 15 - August 9, 1996	:	Country consultants prepare draft report
August 12, 1996	:	Country consultants send draft report to UNIDO in Vienna and to the

		international consultant
August 12 - 23, 1996	:	UNIDO and the international consultant review the reports
August 26 - 28, 1996	:	International expert and country consultants meet in Jamaica to receive comments and suggestions to complement the national reports.
September 9, 1996		Country consultants send the final national reports to UNIDO in Vienna and to the international consultant.

However, the country consultants did not comply with the agreed schedule and as a consequence the review meeting was held until September 16 and 17. Two reviewed versions were received by the 17 of October by the international consultant (Belize and Honduras), and the one by Jamaica the 31 of October. Neither of them included all the additional information requested in the meeting of September.

TABLES

Table 1.1
BELIZE
MAJOR ECONOMIC INDICATORS

	1989	1990	1991	1992	1993	1994 R	1995 P
POPULATION (Thousands)	183.2	184.3	189.4	199.0	205.0	211.0	216.0
PER CAPITA GDP (BZ\$, Curr)	3,328.0	3,579.0	374.3	4,129.0	4,398.0	4,435.0	4,718.0
GDP AT CURRENT MARKET PRICES (BZ\$)	613.5	677.2	727.3	823.7	901.5	927.0	985.9
Real GDP Growth (%)	13.2	10.3	3.1	9.5	4.3	1.5	3.8
Sectoral Distribution of Constant Price GDP (%)	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Agriculture, Forestry & Fishing	18.3	18.5	18.7	19.6	18.8	19.1	19.6
Mining	0.5	0.7	0.9	0.8	0.8	0.7	0.8
Manufacturing	17.2	17.2	16.7	16.4	16.4	16.9	17.0
Utilities	1.8	1.8	1.9	1.9	2.0	2.1	2.1
Construction	7.1	7.1	7.4	7.6	8.3	6.5	6.4
Trade, Restaurant & Hotels	18.7	19.2	18.3	17.8	17.7	18.2	17.9
Transport and Communication	12.4	12.6	13.3	14.4	14.6	14.6	14.6
Finance, Insurance, Real Estate & Business Services	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Public Administration	9.3	8.8	8.8	8.3	8.2	8.4	8.1
Other Services	8.0	7.5	7.5	7.0	6.9	7.0	6.9
Less Imputed Bank Charges	3.6	3.6	3.4	3.4	3.4	3.3	3.3
MONEY AND PRICES (BZ \$mn)							
Inflation (Annual percentage rate)	2.1	3.0	4.5	2.4	1.5	2.6	2.9
Currency and Demand deposits (M1)	97.8	105.5	122.8	143.8	149.2	157.2	165.0
Quasi-Money (Savings and Time Deposits)	225.2	269.2	306.4	325.4	324.4	350.0	424.4
Money Supply (M2)	323.0	374.7	429.2	469.2	473.6	507.2	589.4
CREDIT (BZ \$mn)							
Commercial Bank Loans and Advances	255.8	299.4	336.0	373.2	404.1	422.4	440.7
Public Sector	22.5	28.9	4.9	1.2	13.9	13.8	2.7
Private Sector	233.3	270.5	331.1	372.0	390.2	408.6	438.0
INTEREST RATE (%)							
Weighted Average Lending Rate	14.0	14.3	14.3	14.4	14.6	15.0	16.2
Weighted Average Deposit Rate	6.0	6.3	6.4	6.0	6.0	6.1	7.1
CENTRAL GOVERNMENT FINANCES (BZ \$MBN)*							
Current revenue	184.2	210.9	224.4	230.1	249.0	265.1	259.9
Current Expenditure	127.0	137.8	150.5	173.2	208.7	233.8	239.8
Current Account Surplus/(Deficit)	57.2	73.1	73.8	56.9	40.3	31.3	20.1
Capital Expenditure	69.0	85.8	118.4	148.6	139.1	111.0	83.2
Overall Surplus/(Deficit)	1.6	1.7	(42.5)	(50.2)	(69.1)	(65.2)	(46.9)
Domestic Financing	(12.1)	(7.4)	24.7	26.4	32.3	24.5	33.1
External Financing	10.5	5.7	17.8	30.9	46.3	27.1	3.7
BALANCE OF PAYMENTS (US \$mn)							
Merchandise Exports	124.8	129.2	126.3	141.3	134.1	143.5	149.9
Merchandise Imports	192.6	188.4	223.6	244.5	250.6	231.9	214.2
Trade Balance	(67.8)	(59.2)	(97.3)	(104.3)	(116.5)	(88.4)	(64.3)
Current Account Balance	(19.0)	15.2	26.6	29.1	(49.0)	(30.5)	1.3
Capital Flows	27.2	25.1	22.0	29.1	43.3	18.0	(19.8)
Net Change in Official International Reserves	N/A	N/A	N/A	N/A	N/A	N/A	N/A
N/A note: minus = increase	(11.7)	(12.5)	20.8	(1.4)	18.9	3.7	(4.8)
Net International Reserves	55.6	72.0	49.3	50.7	31.8	28.1	32.2
Import Cover of Reserves (in months)	4.1	4.3	2.9	2.7	1.7	1.4	2.9
EXTERNAL PUBLIC DEBT (US \$mn)							
Disbursed Debt Outstanding	130.6	N/A	150.6	145.6	167.9	184.0	183.9
Debt Service Payments	14.6	N/A	15.0	13.4	15.5	24.0	29.8
Debt Service Ratio	6.6	N/A	5.8	4.6	5.4	8.2	10.3

Sources: Central Statistical Office / Ministry of Finance / Central Bank of Belize

CUBA
MAJOR ECONOMIC INDICATORS

INDICATORS	U.M.	1989	1993	1994	1995	YARG
Gross Domestic Product	Billions	19,585.8	12,776.7	12,868.3	13,184.3	1.55
Variation i/i - 1	%	0.7	(14.9)	0.7	2.5	
Variation i/1989	%		(34.7)	(34.0)	(32.7)	
Per Capita GDP	P	1,865	1,172	1,175	1,200	
GDP Agriculture 1	Billions	1,924.5	924.9	879.4	915.5	(0.55)
GDP Manufacturing	Billions	4,886.8	3,103.6	3,340.6	3,555.0	7.05
GDP Services 1	Billions	11,301.8	8,266.1	8,166.9	8,149.6	(0.70)
Population 2	Th	10,522.8	10,904.5	10,951.3	10,978.1	0.65

Economic Active Population. *

Employment 1	Th	3,669.0	N.D.	3,435.7	3393.8	(1.20)
Tourism Employment	MM	N.D.	63.3	N.D.	57.6	(4.65)
Trade Balance	Billions	(2,734.0)	(900.0)	(796.0)	(1,293.0)	
Exports (FOB)	Billions	5,400.0	1,137.0	1,315.0	1,479.0	(14.05)
Imports (CIF)	Billions	8,134.0	2,037.0	2,111.0	2,772.0	(16.65)

Current account Balance *

Tourism Exports		N.D.	N.D.	N.D.	N.D.	
Tourism Imports. 2	Billions	273.3	699.2	898.2	1,146.9	28.10
No. of Tourists 1	Th	300.0	543.8	616.7	738.2	16.50

Consumer Price Index (CPI) *

Products Price Index (PPI) **

Interes rates

Average exchange rate.		1:1	1:1	1:1	1:1	
Minimum wage		N.D.	N.D.	N.D.	N.D.	
Average wage 2	Pesos	189.0	184.0	186.0	195.0	3.00

1 The Economist Conferences. Selected indicators of the Cuban economy. London, June, 1996

2 Oficina Nacional de Estadística

*There are not official figures published

YEARLY AVERAGE RATE OF GROWTH
(YARG) (%)

Indicators	A	B
GDP	5	8
Agriculture GDP	10	12
Manufacturing GDP.	6	8
Services GDP	2.5	3.5
Population	0.3	0.3
Employment	1.5	2.5

Table 1.3

HONDURAS
MAJOR MACROECONOMICS INDICATORS
(1990-95)

Indicators	1990	1991	1992	1993	1994	1995	YARG %
1. GDP (In Mill de LP)	5,165	5,344	5,634	5,985	5,897	6,111	3.4
2. Imports of Goods (M)	915	913	990	1,080	1,351	1,519	10.7
3. Final Consumption (M)	4,133	4,205	4,303	4,561	4,464	4,634	2.3
4. Domestic gross invest	962	1,084	1,310	1,538	1,745	1,842	13.9
5. Exports of Goods (M)	848	834	833	873	940	1,188	7.0
6. Trade Balance (5-2)	(67)	(79)	(157)	(207)	(411)	(331)	
7. Agriculture/GDP (m)	1,285	1,364	1,412	1,404	1,415	1,513	3.3
8. Mining/GDP (Mill. L)	71	75	83	86	88	96	6.2
9. Manufacturing/GDP	709	721	765	813	798	819	2.9
10. Construc./GDP (M)	218	212	284	344	278	272	4.5
11. Services/GDP (M)	2,882	2,962	3,090	3,338	3,318	3,411	3.4
GDP (Factor price) (M)	11,156	14,003	16,131	19,495	25,102	32,545	23.90
GDP (Market price) (M)	12,537	16,342	18,800	22,689	28,715	37,350	24.40
Final Consumption (M)	10,271	12,790	14,663	17,122	21	27,728	22.00
Domestic gross investr	2,881	4,022	4,881	7,342	10,346	11,781	32.50
Agriculture/GDP (Mill	2,503	3,178	3,286	4,014	6,028	7,973	26.10
Mining/GDP (Mill. L)	191	231	308	369	490	655	28.00
Manufacturing/GDP (M)	1,823	2,367	2,875	3,456	4,275	5,440	24.40
Construction/GDP (M)	574	745	1,061	1,457	1,445	1,853	26.40
Services/GDP (Mill.L)	6,065	7,482	8,601	10,199	12,864	16,624	22.30
Population (Th)	4,758	4,910	5,079	5,248	5,422	5,603	
GDP (Market prices) (C	3,031	3,304	3,345	2,896	3,374	3,944	
Per Capita Income (In	637	673	659	552	622	704	
12. Tourism ¹ /Exports	29.0	30.6	31.8	60.0	72.0	80.0	15.5
13. Tourism /Imports.	37.5	36.8	38.2	55.0	57.0	57.0	1.8
14. Tourists number (T	290	226	244	261	234	271	(1.3)
15. Consumer Price In	23.3	34.0	8.8	10.7	21.7	26.8	20.9
16. Productors Price In	29.6	34.6	10.1	12.7	26.5	32.6	14.4
	2/	2/	2/	2/	3/	3/	
17. Interest rate	17.0	25.0	21.0	21.0	35.2	37.8	
18. Average exchange r	4.38	5.40	5.62	6.57	8.51	9.47	16.7
19. Minimum wage (5/	7.25	10.70	12.00	13.80	13.80	16.95	18.5
20. Population (Thous)	4,758	4,910	5,079	5,248	5,422	5,603	3.3
21. Economic Active P	1,463	1,523	1,586	1,653	1,723	1,796	
22. Employment	1,359	1,412	1,497	1,537	1,579	1,648	3.9

1/ Period 1993-95, 2/ Special Rate of the Fondo de Desarrollo Industrial (FONDEI), 3/ Average lending rate 4/Average selling rate in the banks 5/ Manufacturing Industry, from 1 to 5 workers

JAMAICA
Macro Economic indicators 1991 to 1995

	Unit	1991	1992	1993	1994	1995
GDP J\$	J\$B.(Cons \$)	17.50	17.70	18.00	18.10	18.20
GDP Growth %	%	0.70	1.40	1.40	0.80	0.80
GDP US\$	US\$B.(Cons \$)	1.50	0.80	0.70	0.50	0.50
Population	Millions	2.41	2.43	2.43	2.46	2.49
GDP/Capita	US\$	642.30	330.00	287.60	203.70	200.20
Exchange Rate	J\$ per US\$	11.30	22.88	24.15	32.90	35.15
Inflation Rate	%	80.20	40.20	30.10	26.80	25.60
Exports	US\$ Millions	1,056.60	1,031.80	1,058.30	1,182.80	1,379.60
Imports	US\$ Millions	1,828.60	1,775.40	2,189.20	2,172.20	2,772.90
Balance of Trade	US\$ Millions	(778.00)	(743.60)	(1,130.90)	(994.40)	(1,393.30)
Tourism Receipts	US\$ Millions	764.00	858.00	942.00	919.00	965.00
Balance on Current Account	US\$ Millions	(255.80)	10.90	(194.20)	18.30	(255.10)
Foreign Debt	US\$ Billions	3.90	3.70	3.60	3.70	3.40
Budget Surplus	%	2.20	2.80	2.10	1.30	0.40
Money Supply	J\$ Billions	6,867.90	10,283.60	14,396.20	16,374.00	23,227.70
Net Int'l Reserves	US\$ Millions	(356.30)	(50.70)	70.80	408.30	418.60
Unemployment	%	15.40	15.70	16.30	15.40	16.20
Agriculture/GDP	%	6.20	6.90	7.50	8.00	8.10
Manufacturing/GDP	%	19.40	19.40	18.80	18.50	18.20
Mining /GDP	%	9.20	8.80	8.70	9.30	8.60
Services/GDP	%	14.10	14.60	15.30	15.90	17.10

Source: STATIN

Table 2.1

CUBA
MAJOR ECONOMIC INDICATORS

Indicators	Unit	YEAR 2000	
GDP	Billions	16,830	- 19,375
Agriculture/GDP	Billions	1,225	- 1,345
Manufacturing /GDP	Billions	5,725	- 6,265
Services/GDP	Billions	9,220	- 9,680
Population	Th	11,147	11,147
Employment	Th	3,655	- 3,840

HONDURAS
FORECAST OF SOME MACROECONOMIC INDICATORS (1996-2000)

Indicators	1995	1996	1997	1998	1999	2000	Rate 2000/96
1. GDP (Millions LPs 1978)	6,111	6,362	6,614	6,878	7,151	7,438	4.00
2. Population (Thousands)	5,603	5,789	5,981	6,180	6,385	6,597	3.30
GDP (Market prices) (mill. L)	3,944	4,106	4,269	4,439	4,615	4,800	
Per Capita Income (mill. L)	704	709	714	718	723	728	
3. Economic Active Population (EAP) (Th)	1,796	1,874	1,955	2,041	2,131	2,227	4.40
4. Imports of Goods (Millions \$)	1,519	1,563	1,641	1,723	1,809	1,900	5.00
5. Exports of Goods (Millions \$)	1,188	1,266	1,300	1,335	1,371	1,408	2.70
6. Agriculture / GDP (Millions LPs 1978)	1,513	1,564	1,603	1,643	1,684	1,726	2.50
7. Manufact and Mining / GDP (Millions LPs. 1978)	915	952	985	1,020	1,055	1,092	3.50
8. Construcción / GDP (Millions LPs. 1978)	272	286	306	327	350	375	7.00
9. Services / GDP (Millions LPs. 1978)	3,411	3,560	3,720	3,888	4,062	4,245	4.50

Source: Input-Output Model , JICA 1995, BCH with estimations of the national expert

Table 3.1

BELIZE
3.1.1 TOURISM INCOME
1988-1995

Year	US\$ Million
1988	37
1989	45
1990	45
1991	45
1992	60
1993	69
1994	71
1995	78

Source: Belize Tourist Board, MTE, Belize

3.1.2 TOURIST ARRIVALS BY COUNTRY OF ORIGIN

PAIS	1991		1992		1993		1994	
	No. de turistas	%	No. de turistas	%	No. de turistas	%	No. de turistas	%
U.S.A.	46,372	59.8	58,705	59.1	61,384	59.2	71,588	59.6
Canada	4,729	6.1	6,366	6.4	7,242	7.0	9,216	7.7
United Kingdom	7,287	9.4	9,390	9.5	8,774	8.5	8,010	6.7
Europe	9,341	12.0	15,422	15.5	16,353	15.8	20,508	17.1
Others	9,813	12.7	9,425	9.5	9,856	9.5	10,747	9.0
TOTAL	77,542	100	99,308	100	103,609	100	120,069	100

3.1.3 NUMBER OF HOTELS

AREA	1988	1989	1990	1991	1992	1993	1994	1995
Belize Dist.	47	45	44	51	53	57	59	60
Ambergris	37	37	39	50	51	47	50	52
Caye Caulker	16	21	23	25	24	29	30	33
Cayo	24	31	38	44	52	55	60	67
Corozal	8	8	9	9	9	9	10	12
Orange Walk	7	10	11	12	12	9	10	10
Stann Creek	14	16	10	10	14	25	35	38
Placencia	10	11	15	18	20	22	25	31
Toledo	10	10	12	17	21	26	29	34
Other Islands	10	12	9	12	15	24	23	25
TOTAL	183	201	210	248	271	303	331	362

Source: Belize Tourist Board, Ministry of Tourism and the Environment, Belize

3.1.4 NUMBER OF ROOMS

AREA	1988	1989	1990	1991	1992	1993	1994	1995
Belize Dist.	541	573	532	813	831	881	859	837
Ambergris	413	517	497	716	719	665	709	728
Caye Caulker	159	193	198	229	232	293	291	316
Cayo	232	304	322	381	416	497	545	599
Corozal	122	124	137	134	134	142	143	149
Orange Walk	85	92	110	115	110	93	108	110
Stann Creek	105	131	88	100	133	233	284	318
Placencia	58	66	80	92	101	129	151	185
Toledo	55	71	86	121	146	188	211	239
Other Islands	85	97	65	83	91	204	203	227
TOTAL	1,855	2,168	2,115	2,784	2,913	3,325	3,504	3,708

Source: Belize Tourist Board, Ministry of Tourism and the Environment, Belize

**3.1.5 BELIZE TOURISM INDUSTRY OCCUPANCY RATES
(1993-1996)**

AÑO	ENE	FEB	MAR	ABR	MAY	JUN	JUL	AGO	SEP	OCT
1993	37	41	40	31	28	25	24	27	22	22
1994	36	39	39	30	26	22	25	27	19	19
1995	35	40	41	35	27	26	25	25	21	21
1996	32.6	39.1	40.2	31.3						

Source: Belize Tourist Board, Ministry of Tourism and the Environment, Belize

BELIZE**3.1.6 AVERAGE ROOM RATES BY MONTH (US\$, per night)**

AÑO	ENE	FEB	MAR	ABR	MAY	JUN	JUL	AGO	SEP	OCT
1993	57	56	63	54	51	47	47	48	43	47
1994	62	62	65	61	58	53	49	48	45	49
1995	63	65	62	57	52	51	49	48	47	58
1996	59	67	72	68						

Source: Belize Tourist Board, Ministry of Tourism and the Environment, Belize

CUBA**3.2.1. PARTICIPATION IN THE MAIN DESTINIES OF THE CARIBBEAN****Unit: Th Tourists**

COUNTRY	1990	1991	1992	1993
Cuba	340	424	461	546
Puerto Rico	2,645	2,626	2,640	2,857
Bahamas	1,561	1,427	1,399	1,489
Dominicana	1,533	1,321	1,524	1,719
Jamaica	841	845	909	979
Others	4,932	5,004	5,167	5,708
Total Caribe	11,853	11,647	12,100	13,289
Cuba Participation (%)	2.8	3.6	3.8	4.1

Source: Price Waterhose

3.2.2 RATE OF INCOME INCREASE IN THE CARIBBEAN COUNTRIES**Unit: Billions USD**

Country	1991	1987-1991
Puerto Rico	1,445	10.9
Bahamas	1,222	1.6
República Domi	877	11.3
Jamaica	764	6.4
U.S. Islas Virger	708	2.6
Bermudas	454	1.0
Barbados	453	4.5
Islas Caimán	437	31.5
Antigua	401	18.4
Aruba	314	13.2
St. Maarten	310	15.5
Cuba	300	19.9
Others	1,927	-
TOTAL	9,116	8.0

Source: World Tourism Organization, statistical Yearbook, 1993

3.2.3. LODGING CAPACITY OF THE CARIBBEAN COUNTRIES**Unit: Rooms**

Country	1991	1993	1995
República Dominicana	22,555	26,801	N.D.
Cuba	16,638	22,561	24233 *
Jamaica	17,337	18,935	N.D.
Bahamas	13,165	13,521	N.D.
Puerto Rico	7,897	8,581	N.D.
Guadalupe	7,016	7,798	N.D.
Martinica	5,658	6,960	N.D.
Aruba	5,864	6,150	N.D.
Others	43,355	49,530	N.D.
Total Caribe	139,485	160,837	N.D.

Source: World Tourism Organization. Statistical Yearbook, 1993

3.2.4. OCCUPANCY RATE IN THE CARIBBEAN COUNTRIES**Unit : %**

Country	1991	1993	1995
Aruba	68.9	79.5	N.D.
Dominican Republic	68.3	75.0	N.D.
Cayman Islands	60.0	71.1	N.D.
Grenada	65.0	68.8	N.D.
Puerto Rico	66.3	68.4	N.D.
St. Lucía	65.9	67.9	N.D.
Curacao	77.1	67.1	N.D.
U.S. Virgin Islands	58.4	61.0	N.D.
Guadalupe	62.3	60.7	N.D.
Cuba	-	60.4	52.6 *

Source : Anuario Estadístico CTO 1993.

3.2.5 MAIN COUNTRIES OF ORIGIN OF THE TOURISTS TO CUBA

Country	1991	%	1992	%	1993	%	1994	%	1995	%
Canada	81,044	19.4	94,058	20.6	114,831	21.1	109,711	17.7	141,984	19.2
Italy	24,916	5.9	39,630	8.7	49,109	9.0	66,081	10.7	112,954	15.3
Spain	38,974	9.3	49,059	10.7	53,800	9.8	61,967	10.0	88,902	12.0
Germany	60,976	14.6	57,880	12.7	63,003	11.5	60,156	9.7	56,912	7.7
France	9,252	2.2	13,086	2.8	23,274	4.2	33,870	5.5	34,288	4.6
England	3,225	0.7	5,934	1.3	6,205	1.1	25,411	4.1	19,476	2.6
Mexico	47,675	11.4	44,596	9.7	56,197	10.3	48,900	7.9	31,937	4.3
Argentina	16,201	3.8	19,158	4.2	29,106	5.3	36,367	5.9	32,378	4.4
Sub Total	282,263	67.5	323,401	71.0	395,525	72.7	442,463	71.7	518,831	70.3
Total	417,971	100.0	455,240	100.0	544,089	100.0	617,284	100.0	738,232	100.0

Source: Oficina Nacional de Estadística

HONDURAS
3.3.1 TOURISM INDICATORS 1991-95

INDICATOR	1991	1992	1993	1994	1995	T.A. 1991/1995
Visitors (People Number)	226,121	243,544	261,475	233,516	270,549	4.6
Hotels Number	276	306	337	352	405	10.1
Rooms Number	7,259	7,968	8,551	8,803	10,022	7.4
Beds Numer	11,946	12,473	14,427	14,849	16,979	9.2
Occupancy rate per room (%)	n.d	n.d	n.d	70	n.d	
Stay average (number of days)	n.d	5.5	5.6	n.d	n.d	
Income foreign currency (Millions of Dollars USA)	30.6	31.8	60	72	80	n.d
Restaurants	458	524	555	813	..	
Hotels Employment	3,768	3,933	4,080	4,227	..	
Other Touristic Areas Employment	6,585	7,942	8,859	9,769	..	

1/ Including Night Clubs, Travel Agencies, Car rentals and Handicraft stores.

**3.3.2. FORECAST OF SOME INDICATORS OF THE TOURISM INDUSTRY
(1996-2000)**

Indicator	1995	1996	1997	1998	1999	2000	Crecimiento Anual
1. Visitors	270,549	282,994	296,011	309,628	323,871	338,769	4.6
2. Rooms	2808.0	3043.0	3299.0	3576.0	3877.0	4203.0	8.4
3. Income of foreign currency (Millions of A14US \$)	80.0	88.4	97.7	107.9	119.3	131.8	10.5
4. Expenditure Per Cápite (\$)	296	313	331	350	370	390	5.7

Source: THT, With estimations of the national expert

Table 3.4

JAMAICA
Tourist Indicators 1991 to 1995 Jamaica

INDICATOR/YEAR	Unit	1991	1992	1993	1994	1995
Foreign Exchange Earnings	US\$(Mill)	764	858	942	919	969.0
Visitor Arrivals: Stop Over	Thousands	1,006.8	1,057.1	1,105.4	1,108.9	1,147.0
Visitor Arrivals: Cruise Ships	Thousands	490.5	649.5	629.6	595.6	605.2
TOTAL VISITORS	Thousands	1,497.0	1,706.6	1,850.4	1,704.5	1,752.2
Hotel Rooms	Units	11,423	12,189	12,643	13,080	13,742
Other Rooms	Units	5,914	6,402	6,292	6,680	6,928
TOTAL ROOMS	Units	17,337	18,591	18,935	19,760	20,670
Occupancy Rate	Percent	57.9	60.1	60.3	57.3	60.8
Accommodation Employment	FTE (1)	22,788	25,466	26,030	28,410	31,154
Other Direct Employment (2)	FTE	43,181	46,244	73,298	80,000	87,727
Indirect Employment (2)	FTE	31,289	34,966	35,740	39,008	42,774
Induced Employment (2)	FTE	98,936	110,563	113,012	123,446	135,255
TOTAL EMPLOYMENT	FTE	196,194	217,239	248,071	270,864	296,910

Sources and Definitions

All statistics are from the Jamaica Tourist Board unless otherwise stated

(1) FTE: Full Time Equivalent Jobs (Definition)

(2) Economic Impact of Tourism in Jamaica 1992: OAS: 1994

Table 4.2

CUBA
APPARENT NATIONAL CONSUMPTION

311101 Livestock slaughter and birds							
• Beef meat meat							
	U.M.	1991	1992	1993	1994	1995	
1.1	National Production	Mt	44.6	34.6	29.3	29.4	N.A.
	Imports	Mt	---	---	---	---	0.1
1.2	Apparent National Consumption		Process does not				
1.3	Forecast of production and Apparent National Consumption by 1996-2000						
	Not available						
• Pork meat in bands							
	U.M.	1991	1992	1993	1994	1995	
1.1	National Production	Mt	47.9	13.9	10.5	14.3	N.A.
	Imports	Mt	---	---	---	---	0.0
1.2	Apparent National Consumption		Process does not				
1.3	Forecast of production and Apparent National Consumption by 1996-2000						
	Not available						
311164 Preserves preparation and meat balys							
• Meats in preserved							
	U.M.	1991	1992	1993	1994	1995	
1.1	National Production	Mt	47.5	65.8	67.6	66.8	N.A.
	Imports	Mt	---	---	---	---	0.3
1.2	Apparent National Consumption		Process does not				
1.3	Forecast of production and Apparent National Consumption by 1996-2000						
	Not available						
311282 Cream, butter and cheese manufacturing							
• Cheese							
	U.M.	1991	1992	1993	1994	1995	
1.1	National Production	Mt	10.4	2.9	2.3	2.8	3.3
	Imports	Mt	---	---	---	---	0.5
1.2	Apparent National Consumption		Process does not				
1.3	Forecast of production and Apparent National Consumption by 1996-2000						
	Not available						
311284 Ice-cream and gelatins							
• Ice-cream							
	U.M.	1991	1992	1993	1994	1995	
1.1	National Production	MMG	19.3	15.7	11.3	10.1	11.1
	Imports	MMG	---	---	---	---	0.0
1.2	Apparent National Consumption		Process does not				
1.3	Forecast of production and Apparent National Consumption by 1996-2000						
	Not available						
311501 Bread products							
• Nonferrous pastes							
	U.M.	1991	1992	1993	1994	1995	
1.1	National Production	Mt	33.0	21.7	13.0	24.2	25.4
	Imports	Mt	---	---	---	---	0.5
1.2	Apparent National Consumption		Process does not				
1.3	Forecast of production and Apparent National Consumption by 1996-2000						
	Not available						
311701 Oils and edible fats							
• Vegetal oil refine							
	U.M.	1991	1992	1993	1994	1995	
1.1	National Production	Mt	54.3	41.9	29.7	17.4	13.5
	Imports	Mt	---	---	---	---	57.0
1.2	Apparent National Consumption		Process does not				
1.3	Forecast of production and Apparent National Consumption by 1996-2000						
	Not available						
312124 Mayonnaise manufacture, Vinegar and other seasoning							
• Vinegar							
	U.M.	1991	1992	1993	1994	1995	
1.1	National Production	MML	6.9	7.8	6.2	5.5	8.0
	Imports	MML	---	---	---	---	0.0
1.2	Apparent National Consumption		Process does not				
1.3	Forecast of production and Apparent National Consumption by 1996-2000						
	Not available						
3513 Artificial fibers and textiles							
• Fiber of rayon							
	U.M.	1991	1992	1993	1994	1995	

Table 4.2

CUBA
APPARENT NATIONAL CONSUMPTION

1.1	National Production	-	-	-	-	-	-
	Imports	-	-	-	-	-	-
1.2	Apparent National Consumption						
1.3 Forecast of production and Apparent National Consumption by 1996-2000							
		U.M.	1996	1997	1998	1999	2000
	National Production	t	240	1,320	1,650	2,065	2,580
	Imports		-	-	-	-	-
	Exports		-	-	-	-	-
	Apparent National Consumption		-	-	-	-	-
3522 Other substances industry and Chemical products							
• Paints							
		U.M.	1991	1992	1993	1994	1995
1.1	National Production	ML	8,903.2	4,412.9	2,872.5	4,842.8	4,220.0
	Imports	ML		-	-	-	278.4
	Exports						
1.2	Apparent National Consumption						4,498.4
1.3 Forecast of production and Apparent National Consumption by 1996-2000							
		U.M.	1996	1997	1998	1999	2000
	National Production	ML	6,000.0	6,593.9	7,636.9	8,731.7	9,843.8
	Imports		N.A.	N.A.	N.A.	N.A.	N.A.
	Exports		-	-	-	-	-
	Apparent National Consumption						Proceed does not
3611 Pottery and Ceramic							
• Sanitary furniture							
		U.M.	1991	1992	1993	1994	1995
1.1	National Production	MU	121.5	96.0	70.0	70.2	110.4
	Imports		-	-	-	-	-
	Exports	MU	-	-	-	1.0	3.5
1.2	Apparent National Consumption						Proceed does not
1.3 Forecast of production and Apparent National Consumption by 1996-2000							
		U.M.	1996	1997	1998	1999	2000
	National Production	MU	160.0	290.0	N.A.	N.A.	N.A.
	Imports		-	-	-	-	-
	Exports	MU	10.0	30.0	N.A.	N.A.	N.A.
	Apparent National Consumption						Proceed does not
• Mosaic cubes							
		U.M.	1991	1992	1993	1994	1995
1.1	National Production	Mm	755.6	482.0	249.2	276.4	390.2
	Imports		-	-	-	-	-
	Exports	Mm	N.A.	N.A.	N.A.	29.0	N.A.
1.2	Apparent National Consumption						Proceed does not
1.3 Forecast of production and Apparent National Consumption by 1996-2000							
		U.M.	1996	1997	1998	1999	2000
	National Production	Mm	500.0	560.0	N.A.	N.A.	N.A.
	Imports		-	-	-	-	-
	Exports	Mm	N.A.	155.0	N.A.	N.A.	N.A.
	Apparent National Consumption						Proceed does not

Notes:

— In imports are not reflected the figures, since in this period were decentralized the import companies and the base is not homogeneous, something which could give contradictory elements

Apparent National Consumption: Proceed does not, upon descending the national production of the crisis and have not correspondence in the figures of import, is considered not to calculate them

N.D. Not available

Table 4.3

HONDURAS
SOME CHARACTERISTICS OF THE BRANCHES BUT LINKED TO TOURISM
Economic-Plans Units

Industrial Branches	Textiles	Carries	Attention	Others	Total Units	Employment	Compendium with + of 100 empl.
31. Food and Drinks	107	117	20	154	398	24774	53
3111. Industry of the Meat	10	12	2	9	33	2,081	8
3112. Milk Products	8	8	2	12	30	1,642	6
3113. Preserves of fruit and packed vegetables	4	3	3	8	18	6,515	5
3114/6 Cereal & Cereal Preparations	5	19	2	19	45	1,579	3
3115. Bread Products	48	43	5	53	151	2,942	4
3117. Oils and edible fats	1	2	2	4	9	1,718	5
3118. Sugar-beet industry	1	2	0	4	7	2,371	7
3119. Other foods	2	0	0	0	2	82	1
3121. Other Edible Products and Preparations	19	18	2	19	58	1,619	4
3130. Drinks	3	5	2	6	16	1,785	4
3131. Beverages No Alcoholic Industry	5	4	0	2	11	731	2
3140. Tobacco & Cigarettes	1	1	0	16	18	1,709	4
32. Textile industry	68	107	3	39	217	11,554	24
3211. Textile Yarn, Fabric & Clothing	4	7	0	1	12	2,058	4
3212. Articles except textile pledges	3	5	0	0	8	290	1
3213. Fabrication of carpets and tapestries	0	1	0	0	1	213	1
3214. Points fabrics	2	11	0	0	13	2,535	6
3220. Pledges of getting dressed	29	30	1	22	102	4,957	9
3230. Article of Leather & Leather Industry	3	4	1	6	14	350	1
3240. Industry of the leather Footwear	27	29	1	10	67	1,151	2
33. Wood and furniture	62	56	19	108	245	7,457	16
3311. Sawmills and carpenteries	18	8	2	59	86	4,542	13
3312/9. Cork and wood Manufactures, Including Furniture	10	8	4	13	37	726	0
3320. Furniture & Parts Thereof	34	40	15	35	122	2,189	3
34. Paper and printed	62	48	4	10	124	4,438	4
3410/9. Paper, Paperboard and articles of paper	8	8	1	0	17	1,452	4
3420. Printed on editorial	54	40	3	10	107	2,986	0
35. Chemical Industry	53	50	2	1	106	4,622	10
3513. Artificial fibers and synthetics	0	0	0	0	0	0	0
3522/29. Other substances and chemical products	56	23	1	0	60	2,373	3
3560. Plastic Materials	17	27	1	1	46	2,249	7
36. Mineral products no metallic	16	2	1	1	20	384	0
3610/20. Pottery and ceramic	16	2	1	1	20	384	0
Totals	368	380	49	313	1,110	53,229	107

Table 4.3

HONDURAS
FORECAST OF APPARENT NATIONAL CONSUMPTION (CNA) 1991
(In Thousands of Lempiras)

Industrial Branches	Value Produc. (1)	Import (2)	Export (3)	A N C (4)=1+2-3	Coef. De M (5)= 2/4
31. Food and Drinks	3,233,211	375,940	355,106	3,254,045	11.6
3111. Industry of the Meat	523,104	23,139	170,291	375,952	6.2
3112. Milk Products	267,805	77,729	1,597	343,937	22.6
3113 Preserves of fruit and packed vegetables	126,146	13,850	48,709	91,287	15.2
3114/6 Cereal & Cereal Preparations	464,070	13,999	2,461	475,608	2.9
3115 Bread Products	259,544	3,001	772	261,773	1.1
3117 Oils and edible fats	439,515	67,155	6,061	500,609	13.14
3118 Sugar-beet industry	279,677	660	47,421	232,916	0.3
3119 Coffee, Tea, Cocoa, Spices & Manufactures Thereof	34,341	8,278	1,306	41,313	20
3121 Other Edible Products and Preparations	252,526	198,007	26,700	363,633	38
3130 Drinks	205,247	26,672	297	231,622	11.5
3131 Beverages No Alcoholic Industry	230,863	898	0	231,761	0.4
3140 Tobacco & Cigarettes	150,383	2,552	49,491	103,644	2.5
32. Textile industry	635,541	303,972	121,797	817,716	37.2
3211 Textile Yarn, Fabric & Clothing	153,722	117,832	39,348	232,206	50.7
3212 Articles except textile plodges	384	21,282	3,353	18,313	100
3213 Fabrication of carpets and tapestries	0	2,092	0	2,092	100
3214 Points fabrics	50,167	13,373	11,880	51,660	25.9
3220 Plodges of juting dressed	331,532	135,059	60,864	405,727	33.3
3230 Article of Leather & Leather Industry	38,657	6,291	4,639	60,309	10.4
3240 Industry of the leather Footwear	41,079	8,043	1,713	47,409	17
33. Wood and furniture	578,803	11,261	88,945	501,119	2.2
3311 Sawnmill and carpenteries	404,213	9,090	24,667	388,636	2.3
3312/9 Cork on wood Manufactures, Excluding Furniture	59,630	1,953	40,801	20,782	9.4
3320 Furniture & Parts Thereof	114,960	218	23,477	91,701	0.25
34. Paper and printed	403,106	418,978	60,134	359,247	55
3410/9 Paper, Paperboard and articles of paper	267,905	362,901	29,501	601,305	60.4
3420 Printed on editorial	135,201	56,077	30,633	160,645	34.9
35. Chemical Industry	495,098	744,646	37,230	1,202,514	61.9
3513 Artificial fibres and sintetic	0	200,141	1,673	198,468	100
3522/29 Other substances and chemical products	218,977	431,685	35,118	615,544	70.1
3560 Plastic Materials	276,121	112,820	437	388,504	29
36. Mineral products no metallic	5,922	82,604	140	88,386	93.5
3610/20 Pottery and ceramic	5,922	82,604	140	88,386	93.5
Totals	4,948,978	1,937,401	663,352	6,223,027	30.15

Table 4.3

HONDURAS
FORECAST OF APPARENT NATIONAL CONSUMPTION (CNA) 1992
(In Thousands of Lempras)

Industrial Branches	Value Produc.	Import	Export	A N C	Coef. De M
	(1)	(2)	(3)	(4)=1+2-3	(5)= 2/4
31. Food and Drinks	4,303,757	344,857	396,105	4252509	8.0
3111. Industry of the Meat	652,581	31,953	201,108	483,426	6.6
3112. Milk Products	310,994	66,743	2,901	374,836	17.7
3113 Preserves of fruit and packed vegetables	160,919	18,195	42,210	136,904	13.3
3114/6 Cereal & Cereal Preparations	859,738	17,380	4,015	873,103	2.0
3115 Bread Products	299,004	6,484	1,291	304,197	2.1
3117 Oils and edible fats	463,815	13,340	27,743	449,412	3.0
3118 Sugar-beet industry	349,963	647	35,000	315,610	0.2
3119 Coffee, Tea, Cocoa, Spices & Manufactures Thereof	37,600	9,594	1,934	45,260	21.2
3121 Other Edible Products and Preparations	330,095	149,894	35,000	444,989	33.7
3130 Drinks	329,854	25,753	163	355,444	7.2
3131 Beverages No Alcoholic Industry	367,687	1,409	2	369,094	0.4
3140 Tobacco & Cigarettes	141,507	3,465	44,738	100,234	3.5
32. Textile Industry	831,239	367,871	162,302	1036808	35.5
3211 Textile Yarn, Fabric & Clothing	155,836	133,510	37,643	251,703	53.0
3212 Articles except textile pledges	403	29,843	13,351	16,535	0.0
3213 Fabrication of carpets and tapestries	0	2,090	19	2,071	100.0
3214 Pouches fabrics	60,524	11,874	13,063	59,335	20.0
3220 Pledges of getting dressed	505,820	178,092	90,359	593,553	30.0
3230 Article of Leather & Leather Industry	71,070	5,217	6,009	70,287	7.4
3240 Industry of the leather Footwear	37,577	7,605	1,858	43,324	17.6
33. Wood and furniture	689,619	10,277	126,732	573,164	1.8
3311 Sawmills and carpenteries	489,847	7,775	26,668	470,954	1.7
3312/9 Cork and wood Manufactures, Excluding Furniture	78,266	2,085	57,711	22,640	9.2
3320 Furniture & Parts Thereof	121,506	417	42,353	79,570	0.5
34. Paper and printed	544,006	357,506	66,694	834,818	42.8
3410/9 Paper, Paperboard and articles of paper	329,670	328,256	9,672	648,254	50.6
3420 Printed and editorial	214,336	29,250	57,022	186,564	15.7
35. Chemical Industry	304,437	726,578	46,622	1184413	61.3
3513 Artificial fibers and synthetic	0	201,309	2,114	199,395	100.0
3522/29 Other substances and chemical products	233,857	413,524	43,389	607,992	68.3
3560 Plastic Materials	268,600	109,545	1,119	377,026	29.1
36. Mineral products no metallic	6,940	86,822	455	93,307	93.0
3610/20 Pottery and ceramic	6,940	86,822	455	93,307	93.0
Totals	6,880,018	1,893,911	798,910	7,975,019	23.8

Table 4.3

HONDURAS
FORECAST OF APPARENT NATIONAL CONSUMPTION (CNA) 1993
(In Thousands of Lempiás)

Industrial Branches	Value Produc. (1)	Import (2)	Export (3)	A N C (4)=1+2-3	Coef. De M (5)= 2/4
31. Food and Drinks	5108603	636539	460,105	5285037	12
3111. Industry of the Meat	854,643	52,539	264,250	642,932	8.2
3112. Milk Products	419,659	117,415	3,317	533,757	22
3113. Preserves of fruit and packed vegetables	214,027	28,276	46,507	195,796	14.4
3114/6 Cereal & Cereal Preparations	903,348	35,454	6,711	932,031	3.8
3115. Baked Products	349,849	30,679	1,160	379,368	8.1
3117. Oils and edible fats	578,665	77,808	18,700	637,773	12.2
3118. Sugar-bowl industry	431,154	28,776	41,847	418,083	6.9
3119. Coffee, Tea, Cocoa, Spices & Manufactures Thereof	48,390	19,887	1,288	66,989	29.7
3121. Other Edible Products and Preparations	395,057	205,158	7,216	594,009	34.7
3130. Drinks	349,007	23,687	223	372,472	6.4
3131. Beverages No Alcoholic Industry	416,855	13,675	0	430,530	3.2
3140. Tobacco & Cigarettes	147,939	2,185	68,827	81,297	2.7
32. Textile industry	1099169	457809	77,347	1479631	30.9
3211. Textile Yarn, Fabric & Clothing	166,263	152,176	25,197	293,262	51.9
3212. Articles except textile pledges	822	41,586	3,647	38,761	100
3213. Fabrication of carpets and tapestries	0	2,026	2,084	542	100
3214. Points fabrics	38,108	9,807	13,456	34,459	28.5
3220. Pledges of getting dressed	758,730	250,675	31,401	958,004	34.1
3230. Articles of Leather & Leather Industry	77,172	10,850	934	87,088	12.5
3240. Industry of the leather Footwear	58,074	10,089	628	67,535	14.9
33. Wood and furniture	801,697	27,149	213,128	615,718	4.4
3311. Sawnmills and carpenteries	570,150	6,035	107,000	469,185	1.3
3312/9. Cork and wood Manufactures, Excluding Furniture	87,658	7,559	47,000	48,217	15.7
3320. Furniture & Parts Thereof	143,889	13,555	59,128	98,316	13.8
34. Paper and printed	669,699	302,350	74,996	1097053	45.8
3410/9. Paper, Paperboard and articles of paper	428,571	443,574	22,900	349,245	52.2
3420. Printed and editorial	241,128	58,776	52,096	247,808	23.7
35. Chemical Industry	383,685	928,911	44,172	1468424	63.3
3513. Artificial fibers and sintetics	0	267,282	0	267,282	100
3522/29. Other substances and chemical products	270,883	539,631	29,563	780,553	69.1
3560. Plastic Material	312,800	121,998	14,209	420,589	29
36. Mineral products no metallic	7,280	21,518	3,140	25,658	83.9
3610/20. Pottery and ceramic	7,280	21,518	3,140	25,658	83.9
Totals	8,270,133	2,574,276	872,888	9,971,521	25.82

Table 4.3

HONDURAS
FORECAST OF APPARENT NATIONAL CONSUMPTION (CNA) 1994
(In Thousands of Lempiras)

Industrial Branches	Value Produc. (1)	Import (2)	Export (3)	ANC (4)=1+2-3	Coef. De M (5)= 2/4
31. Food and Drinks	6,275,005	1,003,526	540,194	6,738,337	14.9
3111. Industry of the Meat	1,077,760	41,047	292,076	826,731	5
3112. Milk Products	600,811	139,378	12,473	727,716	19.2
3113. Preserves of fruit and packed vegetables	246,097	47,405	28,994	264,508	17.9
3114/6 Cereal & Cereal Preparations	1,084,128	151,352	5,112	1,230,368	12.3
3115. Bread Products	369,429	50,333	1,857	417,905	12
3117. Oils and edible fats	720,841	113,822	48,581	786,082	14.5
3118. Sugar-beet industry	538,701	56,390	43,987	551,104	20.6
3119. Coffee, Tea, Cocoa, Spices & Manufactures Thereof	57,260	30,388	404	87,844	34.6
3121. Other Edible Products and Preparations	444,354	318,479	1,805	759,028	42
3130. Drinks	378,800	31,792	783	409,807	7.8
3131. Beverages No Alcoholic Industry	572,908	20,697	0	593,605	3.3
3140. Tobacco & Cigarettes	183,316	2,443	102,120	83,639	2.9
32. Textile industry	1,375,005	635,724	112,115	1,898,614	33.5
3211. Textile Yarn, Fabric & Clothing	197,261	209,274	23,027	383,508	54.6
3212. Articles except textile pledges	992	47,784	2,472	46,304	100
3213. Fabrication of carpets and tapestries	0	3,642	0	3,642	100
3214. Prints fabrics	44,833	11,891	24,830	31,874	37.3
3220. Pledges of getting dressed	966,116	332,348	58,515	1,239,949	26.8
3230. Article of Leather & Leather Industry	97,481	16,736	1,356	112,881	14.8
3240. Industry of the leather Footwear	68,322	14,049	1,913	80,456	17.5
33. Wood and furniture	1,010,664	34,536	278,277	766,923	4.5
3311. Sawmills and carpenteries	694,619	9,878	116,094	588,603	1.7
3312/9. Craft on wood Manufactures, Excluding Furniture	105,497	5,370	49,754	61,113	8.8
3320. Furniture & Parts Thereof	210,548	19,288	112,429	117,407	16.4
34. Paper and printed	814,229	611,332	58,157	1,367,634	44.7
3410/9. Paper, Paperboard and articles of paper	554,347	533,568	32,402	1,075,513	51.5
3420. Printed on editorial	239,882	57,984	25,735	292,111	19.8
35. Chemical Industry	752,006	1,194,697	39,484	1,907,219	62.6
3513. Artificial fibers and sintetics	0	372,163	0	372,163	100
3522/29. Other substances and chemical products	343,892	665,820	21,156	988,562	67.4
3560. Plastic Materials	408,114	156,705	18,328	546,492	28.7
36. Mineral products no metallic	7,649	142,979	3,442	147,186	97.1
3610/20. Pottery and ceramic	7,649	142,979	3,442	147,186	97.1
Totals	10,234,558	3,623,014	1,031,669	12,825,903	28.2

Table 4.3

HONDURAS
FORECAST OF APPARENT NATIONAL CONSUMPTION (CNA) 1995
(In Thousands of Lempires)

Industrial Branches	Value Produc. (1)	Import (2)	Export (3)	ANC (4)=1+2-3	Coef. De M (5)= 2/4
31. Food and Drinks		1,402,122			
3111 Industry of the Meat		140,998			
3112 Milk Products		177,127			
3113 Preserves of fruit and pickled vegetables		96,298			
3114/6 Cereal & Cereal Preparations		131,090			
3115 Bread Products		110,536			
3117 Oils and edible fats		193,408			
3118 Sugar-bowl industry		25,554			
3119 Coffee, Tea, Cocoa, Spices & Manufactures Thereof		50,439			
3121 Other Edible Products and Preparations		376,830			
3130 Drinks		53,121			
3131 Beverages No Alcoholic Industry		44,580			
3140 Tobacco & Cigarettes		2,091			
32. Textile industry		1,100,357			
3211 Textile Yarn, Fabric & Clothing		338,152			
3212 Articles except textile pledges		74,935			
3213 Fabrication of carpets and tapestries		6,279			
3214 Points fabrics		42,234			
3220 Pledges of getting dressed		580,917			
3230 Article of Leather & Leather Industry		28,130			
3240 Industry of the leather Footwear		29,710			
33. Wood and furniture		58,272			
3311 Sawnmills and carpenteries		21,496			
3312/9 Craft or wood Manufactures, Excluding Furniture		7,294			
3320 Furniture & Parts Thereof		29,482			
34. Paper and printed		1,019,376			
3410/9 Paper, Paperboard and articles of paper		929,212			
3420 Printed or editorial		90,164			
35. Chemical Industry		1,894,103			
3513 Artificial fibers and acetates		589,873			
3522/29 Other substances and chemical products		1,028,256			
3560 Plastic Materials		275,976			
36. Mineral products no metallic		291,335			
3610/20 Pottery and ceramic		291,335			
Totals		5,765,567			

Table 4.4

JAMAICA
APPARENT NATIONAL CONSUMPTION OF PRODUCTS USED IN THE TOURIST
INDUSTRY 1991 - 1994

PRODUCT	Products Manufactured in Jamaica that are used by the Tourist Industry					
		UNITS	APPARENT NATIONAL CONSUMPTION 1991-1994			
			1991	1992	1993	1994
Meat Industry						
Poultry Meat	Production Data Available	KG	60,241,406	57,031,733	70,988,393	77,513,259
Beef	Production Data Available	KG	21,329,871	21,616,340	22,602,265	21,613,970
Mutton, Goat & Sheep	Production Data Available	KG	1,788,973	1,571,160	2,722,006	3,103,848
Fish all types	Production Data Available	KG	14,060,531	13,994,619	13,533,820	15,535,462
Pork	Production Data Available	KG	5,483,943	7,368,353	8,622,207	8,480,069
Shrimp, Lobster, Crabs, Crab	Production but no Data	KG	-25,205	-1,364,151	-2,109,533	-1,998,772
Dairy						
Milk	Production Data Available	KG	31,560,096	35,111,405	39,969,229	24,665,730
Cream	Production Data Available	KG	46,319	136,920	152,636	128,199
Yoghurt	Production but no Data	KG	10,871	1,450	3,286	18,381
Butter	Production Data Available	KG	789,676	611,508	771,511	726,758
Cheese	Production but no Data	KG	1,759,541	2,811,590	4,610,597	2,390,748
Condensed Milk	Production Data Available	KG	17,969,432	17,292,104	19,188,781	15,640,904
Ice Cream	Production but no Data	KG	330,947	-4,006	949	1,570
Canned & Preserved Foods						
Ham	Production Data Available	KG	245,708	103,510	81,357	197,828
Bacon	Production Data Available	KG	235,000	122,000	-56,621	211,011
Sausages, Frank-furters, Bologna	Production Data Available	KG	2,530,175	637,180	1,489,693	2,549,729
Salted fish in brine	Production but no Data	KG	124,374	1,111,267	265,734	2,283,754
Processed Corn	Production but no Data	KG	-6,613	24,740	31,719	64,415
Processed Beans	Production but no Data	KG	-1,876	23,812	17,681	89,971
Other Processed Vegetables	Production but no Data	KG	-288,467	-236,387	-244,289	-240,639
Guava Jams & Jellies	Production but no Data	KG	-80,079	-99,886	-82,380	-65,655
Other Jams & Jellies	Production but no Data	KG	40,450	41,611	38,342	50,075
Preserved or Prepared Ground	Production but no Data	KG	118,659	30,817	49,906	68,866
Other Nuts Preserved	Production but no Data	KG	9,815	21,048	45,680	42,930
Peanut Butter	Production but no Data	KG	67,321	41,234	107,782	87,318
Preserved Mangoes	Production but no Data	KG	-81,053	-98,140	-12,872	-84,911
Preserved pineapples	Production but no Data	KG	-58,863	-25,706	9,626	26,967
Preserved Citrus fruits	Production but no Data	KG	-703,526	-991,123	-495,919	-4,898
Other Preserved Fruits	Production but no Data	KG	-777,810	-919,941	-831,480	-713,051
Orange Juice not Concentrated	Production but no Data	LT	-53,001	-22,025	15,258	113,754
Grapefruit Juice not Concentrated	Production but no Data	LT	-590,872	-20,195	3,447	-44,053
Lime Juice not Concentrated	Production but no Data	LT	-2,095	165	4,530	19,673
Other Citrus Juices	Production but no Data	LT	29,787	-29,071	-82,242	-228,335
Pineapple Juice not Concentrated	Production but no Data	LT	9,072	43,060	9,739	-14,249
Tomato Juice	Production but no Data	LT	-10,628	6,160	15,070	22,467
Grape Juice not Concentrated	Production but no Data	LT	30,367	88,751	77,129	60,587
Apple Juice not Concentrated	Production but no Data	LT	58,396	71,489	143,462	192,574
Passion Juice	Production but no Data	LT	51	40,445	20	1,125
Mixed Juices	Production but no Data	LT	-522,864	-764,530	-363,090	-424,132
Soya Sauce	Production but no Data	KG	-15,498	-49,205	-6,187	6,281
Tomato Ketchup	Production but no Data	KG	-430,832	-909,324	-395,589	-318,510
Other Tomato Sauces	Production but no Data	KG	6,003	4,559	-13,893	26,614
Vinegar	Production but no Data	LT	526	6,608	18,167	19,683
Pepper Sauce	Production but no Data	KG	-384,832	-522,471	-385,169	-441,022
Mayonnaise	Production but no Data	KG	97,203	141,131	197,841	147,129
Other Sauces	Production but no Data	KG	127,390	-223,991	-186,797	-215,128
Dried Soups	Production but no Data	KG	-373,630	-355,807	-425,957	202,905
Preparations of Milk	Production but no Data	KG	-403,011	-324,593	156,956	1,000,067
Flavoured Powders for Making	Production but no Data	KG	-132,130	30,053	-81,755	855,730
Other Food Preparations NES	Production but no Data	KG	57,976	-84,091	388,928	208,615
Coffee Beans	Production Data Available	KG	8,653,783	-1,105,763	9,380,308	-799,384
Instant coffee	Production but no Data	KG	25,821	14,873	16,784	20,034
Tea	Production but no Data	KG	123,497	84,095	135,648	144,869
Salt	Production but no Data	KG	23,321,865	15,097,839	18,286,586	7,816,017
Grain & Cereals						
Flour	Production Data Available	MT	147,400	146,705	148,151	148,232
Bakery Products						
Biscuits Un sweetened	Production but no Data	KG	-547,601	-769,390	-723,801	-500,086
Biscuits Sweetened	Production but no Data	KG	507,621	-313,424	-364,588	89,453
Ice Cream Cones	Production but no Data	KG	27,929	13,687	11,506	14,184
Mixes & Doughs	Production but no Data	KG	-2,567	20,521	76,949	114,876
Pasta	Production but no Data	KG	39,050	111,002	160,772	271,481
Other Bakers Wares	Production but no Data	KG	-71,409	-237,944	-372,877	-456,258
Yeasts	Production but no Data	KG	154,363	192,822	215,154	214,415
Baking Powders	Production but no Data	KG	59	-3,945	-4,906	2,593
Other Food Preparations of Fl	Production but no Data	KG	969,783	82,555	63,532	155,776

Table 4.4

JAMAICA
APPARENT NATIONAL CONSUMPTION OF PRODUCTS USED IN THE TOURIST
INDUSTRY 1991 - 1994

Corn Processing						
Commeal	Production Data Available	MT	21,233	18,664	16,343	18,286
Edible Oils & Greases						
Soybean Oil	Production Data Available	LT	11,302,415	6,012,635	4,914,445	10,420,550
Coconut Oil	Production Data Available	LT	9,666,441	4,554,893	7,057,511	1,407,033
Edible Fats	Production Data Available	KG	9,671,406	9,694,026	8,546,772	13,133,419
Cereals						
Rice	Production but no Data	MT	84,360	73,363	81,008	68,548
Other Cereals	Production Data Available	KG	125,690	220,474	469,001	870,452
Sugar						
Cane Sugar (brwn)	Production Data Available	MT	80,756	89,084	368,754	98,318
Cane Sugar (refined)		MT	3,4819,683	6475	31,752,305	15,424,911
Flavoured Sugar Syrups	Production but no Data	KG	-589,646	-565,847	-313,049	-272,304
Cocoa, Chocolate & candy						
Chewing Gum	Production but no Data	KG	74,473	44,216	68,433	110,972
Other sugar confectionery prod	Production but no Data	KG	323,352	116,977	285,406	810,324
Confectionery	Production but no Data	KG	-224,689	-195,285	-98,159	88,036
Cocoa Powder un sweetened	Production but no Data	KG	331,753	-5,748	173,320	88,204
Cocoa Powder sweetened	Production but no Data	KG	-39,311	-48,955	-65,319	9,482
Other Cocoa Preparations	Production but no Data	KG	235,631	390,225	267,463	195,130
Cocoa Beans	Production Data Available	KG	3,275,782	4,626,836	3,930,546	4,811,008
Beverages						
Rum	Production Data Available	LT (000)	-933	4,040	7,674	7,843
Other Alcoholic Beverages	Production Data Available	LT (000)	1,172	207	1,400	1,992
Beer & Stout & Malt Beverages	Production Data Available	LT (000)	69,630	76,777	72,501	75,187
Aerated Waters	Production Data Available	LT (000)	51,707	52,151	51,539	70,509
Mineral Water	Production Data Available	LT	19,740	23,046	87,940	347,193
Tobacco						
Cigars (import & export data)	Production Data Available	000	-88,996	-80,873	-88,678	-119,658
Cigarettes (import & export)	Production Data Available	000	1,172,001	1,296,111	1,224,997	1,268,987
Textiles of hard fibres						
Table Linen	Production but no Data	KG	140,207	233,949	398,715	130,967
Drapes	Production but no Data	KG	9,571	7,597	5,413	7,014
Textiles of soft fibres excl. Knits						
Cotton	Production Data Available	SQ MT	5,041,786	7,022,001	9,968,770	15,512,695
Poly/Cotton	Production Data Available	SQ MT	17,823,905	20,673,826	24,692,530	22,828,659
Bed Linens	Production but no Data	KG	51,363	71,528	157,245	163,088
Bedspreads	Production but no Data	KG	4,853	10,378	5,263	6,017
Carpets	Production but no Data	SQ MT	327,038	372,283	304,337	339,287
Knitted Textiles						
Terry (includes fabric and fin)	Production but no Data	SQ MT	53,333	154,417	379,380	393,736
Leather Manufacturing						
Articles of Leather excluding	Production but no Data	KG	5,296	12,000	20,492	7,757
Garment Manufacturing						
Male						
Suits & Jackets	Production but no Data	NO	-549,055	-467,934	-122,803	-140,504
Trousers & Shorts	Production but no Data	NO	-1,240,979	-1,040,418	-491,071	-477,163
Shirts	Production but no Data	NO	-451,792	-1,362,591	-1,429,094	-922,742
Knitted trousers & shorts	Production but no Data	NO	22,402	-119,604	-437,014	-324,444
Knitted Shirts	Production but no Data	NO	-133,011	-208,187	-161,418	-164,397
Swimwear	Production but no Data	NO	-9,673	3,580	-6,623	6,793
Females						
Suits & Jackets	Production but no Data	NO	-29,227	-21,027	-26,426	2,916
Trousers & Shorts	Production but no Data	NO	-2,080,969	-1,082,569	-1,194,520	-404,482
Dresses	Production but no Data	NO	-120,124	-149,722	-104,333	-219,433
Skirts	Production but no Data	NO	-160,103	-71,262	-181,625	-3,565
Shirts & blouses	Production but no Data	NO	-164,008	-299,463	-329,633	-139,882
Knitted Skirts	Production but no Data	NO	-8,537	-10,056	-12,156	-7,987
Knitted trousers & shorts	Production but no Data	NO	-103,133	-302,053	-763,748	-341,855
Knitted Blouses & shirts	Production but no Data	NO	-136,590	-439,426	-378,726	-354,195
Swimwear	Production but no Data	NO	2,274	27,946	3,623	10,878
Unisex						
T Shirts	Production but no Data	NO	-16,121,590	-42,641,174	-37,218,516	-45,434,763
Hats/Caps	Production but no Data	NO	-5,410	149,289	412,723	259,293
Handkerchiefs	Production but no Data	NO	46,632	126,766	356,955	70,599
Footwear						
Plastic & Rubber & Other	Production Data Available	Pair	618,285	516,346	397,899	632,052
Leather	Production Data Available	Pair	526,621	527,158	1,544,563	538,306
Sewmill Products excl. Furifone						
Manufacture of containers other than wood						
Manufacturing & repair of w	Production but no Data	KG	-66,880	100,828	896,314	1,261,759
Paper Manufacturing						
Toilet Paper	Production but no Data	KG	673,122	360,612	277,545	1,679,331

Table 4.4

JAMAICA
APPARENT NATIONAL CONSUMPTION OF PRODUCTS USED IN THE TOURIST
INDUSTRY 1991 - 1994

Tissue and Paper Towels	Production but no Data	KG	170,930	87,724	64,601	438,886
Paper Napkins	Production but no Data	KG	36,793	60,969	89,265	95,603
Paper Socks	Production but no Data	KG	4,676,016	3,660,125	205,036	160,758
Printing						
Leaflets & Brochures	Production but no Data	KG	688,606	1,255,196	1,329,788	1,543,999
Postcards	Production but no Data	KG	2,457	6,013	-2,341	532
Synthetic & artificial fibres						
Chemicals						
Paint	Production Data Available	LT	6,490,899	7,388,684	7,992,673	8,648,838
Putty	Production Data Available	KG	33,293	20,468	36,774	97,325
Soap	Production Data Available	KG	8,461,417	8,946,214	9,023,815	9,514,460
Detergents	Production Data Available	KG	6,933,537	11,084,836	9,033,174	8,897,808
Matches	Production but no Data	100 packs	106,154	106,154	111,883	-65,835
Furniture & Wood Floor Poli	Production but no Data	KG	-4,185	11,795	5,925	69,255
Other Polishes	Production but no Data	KG	8,434	-2,488	41,307	48,508
Disinfectants	Production but no Data	KG	-7,943	-5,156	9,467	65,600
Bleaches	Production but no Data	KG	191,024	17,452	120,499	377,684
Plastics						
Plastic Furniture	Production but no Data	KG	94,163	89,742	122,508	74,131
Plastic Bas & Socks	Production but no Data	KG	401,515	457,639	508,210	737,651
Crates & Boxes	Production but no Data	KG	85,477	80,974	-1,320	91,361
Cups	Production but no Data	KG	-5,763	-5,806	39,988	43,779
Cups, Forks Plates, Knives Et	Production but no Data	KG	-151,033	-113,106	-30,800	-101,411
Drinking Straws	Production but no Data	KG	-11,047	-381	-4,057	-5,643
Other Plastic & Kitchenware	Production but no Data	KG	-8,280	85,342	82,410	25,633
Buckets, Ashtrays, Flower Pot	Production but no Data	KG	61,458	45,137	132,622	151,473
Other Plastic Articles	Production but no Data	KG	239,411	220,177	276,556	379,018

Table 5.1

BELICE
TOURISM PRODUCTS MANUFACTURED

(SUS'000)

	1991	1992	1993	1994	1995
Flour ('000 lb)	24,608	25,873	27,072	26,572	25,400
Cigarettes (millions)	104	114	105	101	94
Beer ('000 gals)	833	950	1,504	1,232	1,086
('000 cases)	444	507	798	657	579
Soft Drinks ('000 cases)	1,011	1,313	1,261	1,619	1,724
Citrus Concentrate ('000 gals)	1,229	2,670	1,953	2,108	3,453
Sugar ('000 Tons)	1,114	1,104	1,141	1,191	1,025
Milk ('000 lb)	2,851	2,504	2,868	3,019	1,025
Sawn Wood ('000 board feet)	4,757	4,424	3,238	4,437	2,661
Marine Products ('000 lbs)	2,429	2,829	3,119	3,380	3,371
Garments ('000 dozens)	325	339	356	275	146
Frozen & Canned Foods	N/A	N/A	N/A	N/A	N/A
Furniture and Handicraft	N/A	N/A	N/A	N/A	N/A
Plastics			NONE		
PVC			NONE		
Polystyrene			NONE		

AGRICULTURE AND INDUSTRIAL PRODUCTION

	1990	1991	1992	1993	1994	1995
CROPS						
Sugarcane ('000 L tons)	1,072	1,114	1,104	1,141	1,191	1,025
Oranges ('000 90lbs. boxes)	1,696	1,203	2,407	1,793	2,020	3,132
Grapefruit ('000 80lbs. boxes)	1,103	792	1,192	1,015	833	1,214
Corn ('000 lbs)	41,162	70,177	56,239	59,939	51,286	62,180
Rice Paddy ('000 lbs)	10,172	10,564	14,649	21,484	14,309	21,227
R. K. Beans ('000 lbs)	5,660	7,833	5,518	7,988	7,071	6,923
Beans ('000 metric tons)	27.0	18.5	25.1	37.2	48.0	44.6
LIVESTOCK						
Cattle: No. Slaughtered	7,870	7,157	8,708	8,296	8,784	8,246
Dressed weight	322	3,119	3,341	3,007	3,184	3,022
Pigs: No. Slaughtered	11,553	8,627	10,955	11,226	13,506	12,108
Dressed weight	1,430	1,012	1,256	1,273	1,702	1,526
Poultry: No. Slaughtered	3,882	4,160	5,051	5,315	5,401	4,419
Dressed weight	13,489	14,384	17,227	16,743	17,013	15,548
Milk ('000 lbs.)	2,735	2,851	2,504	2,868	3,019	2,905
Honey ('000 lbs.)	159	137	136	122	158	213
Eggs ('000 Doz.)	2,087	2,144	2,231	2,298	2,370	2,431
MARINE PRODUCTION						
Fish ('000 lbs.)	N/A	783	613	420	260	324
Lobster ('000 lbs)	N/A	603	557	442	634	864
Conch ('000 lbs.)	N/A	458	462	464	416	302
Shrimp ('000 lbs.)	N/A	578	1,190	1,785	2,059	1,866
Crab ('000 LBS.)	N/A	7	7	8	11	15
INDUSTRIAL PRODUCTION						
Sugar (Long tons)	100,297	101,914	100,528	100,321	105,397	105,344
Molasses (long tons)	46,873	53,913	45,354	53,492	56,471	46
Flour ('000 lbs.)	23,096	24,608	25,873	27,072	26,572	25,400
Fertilizer (metric tons)	11,000	11,414	14,082	17,879	27,436	26,606
Electricity Generated ('000 kw.h.)	105,044	111,422	122,300	136,546	148,859	148,200
Water Consumption ('000 gals.)	550,115	730,403	746,260	786,359	889,948	929,815

Sources: Central Statistical Office, Ministry of Finance, Belize

Table 5.2

CUBA

1.- Coasting matters and components that are produced in the country and are used to manufacture:

a) National products that are consumed by tourist industry

321206	Soft fibers fabric	
	• Yarn	
324001	Footwear	
	• Glass	
332001	Furniture & parts thereof	
	• Covers	
	• Quills	
332003	Mattress production	
	• Textile	
	• Quills	
3513	Artificial and synthetic fibres industry	
	Rayon fibre	
	• Cellulose soda	
	• Bisulfite of carbon	
	• Acido sulfúrico	
3522	Other chemical products	
	Painting	
	• Asphalt	
	• Aglomerados	
	• Naphthas	
	• Oxidants of neutral red iron	
3611	Primary and ceramic	
	Secondary furniture	
	• Plaster	
	• Crochets	
	Magnetic cokes	
	• Clay	
	• Silicatos of sodifers	
	• Sand of siliceo	
	• Ceramics of carbon	
		Orlygas essential
		Mexico
321206	Soft fibers fabric	Mexico
	• Cotton fiber	Mexico
	• Synthetic fiber	
3220	Confection of pludges of getting dressed	
	• T umbles	Mexico
	• Buttons	Mexico
	• Zippers	Mexico
324001	Footwear production	
	• Skin	Mexico
	• Hards	Mexico
	• Objects	Mexico
332001	Furniture & parts thereof	
	• Wood	Mexico
	• Rattan	Republica Dominicana
	• Polirattan	Mexico
3430	Printed, editorial and related industries	
	• Paper	Mexico
352210	Printing industry	
	• Emulsiones de copolimeros of vinyl	Mexico
	• Resinas epoxidicas	Venezuela
	• Celulosas derivatives	Mexico
	• XLtd	Mexico
	• Organics glass	Venezuela, Mexico
	• Glicerinas	Mexico
	• Asbestido Pulvico	Venezuela, Mexico
	• Adhives (securing, antisepticas, etc.)	Mexico
3611	Primary and ceramic	
	Secondary furniture	
	• Ball clay	Mexico
	• Feldspato potasio	Mexico
	• Silicatos of zincato	Mexico
	• Tripolifosfato of sodiana	Mexico
	Magnetic cokes	
	• Fritas	Venezuela, Colombia

Coasting matters and components that are produced in other countries of the Caribbean and are required to manufacture national products:

Table 5.2

Consuming matters and components that are produced in the rest of the world and are required to manufacture national products:

	Origin country
<i>National Product / Consuming matter</i>	
331206 Soft fibers fabric	
· Cotton fiber	Spain
· Synthetic fiber	Spain
· Chemicals (cellulose, vitreous)	Switzerland, Germany
· Textures of sewing	Spain
3220 Construction of packages of getting dressed	
· Textiles	Italy
· Threads	Spain
324001 Footwear production	
· Skin	Italy
· Sole	China
· Heels	Spain, China
· Ords	Spain
· Threads	Spain
332001 Furniture & parts thereof	
· Teak	England
· Polystyrene	Italy
332003 Machine production	
· Docks	Spain
3420 Printed, editorial and related industries	
· Paper	Chile, Canada
· Ink	Spain
· Film and plates	Spain
3513 Fibres y rayon	
· Wood flock	Canada
· Oxidize of Zinc	China
· Chemical agents	Canada, Sweden
352210 Petrology production	
· Oils (linseed, soy, tung, among others)	Holland
· Resin C hydroxy	Canada
· Resin feedlines modified	Canada
· Bitumen	Canada
· M.A.R.K.	Canada
· Diacido of titanium resin	Canada
· Inorganic glass	Canada
· Talk	China
· Pentacortinil	Chile
· Additives	Canada

Table 5.4

JAMAICA
NATIONAL PRODUCTION OF PRODUCTS MANUFACTURED
AND USED IN THE TOURIST INDUSTRY 1991 - 1995

PRODUCT	National Production of Products Manufactured in Jamaica used by the Tourist Industry						
		UNITS	NATIONAL PRODUCTION				
			1991	1992	1993	1994	1995
Meat Industry							
Poultry Meat	Production Data Available	KG	37,379,000	31,088,000	35,476,000	40,750,000	41,970,000
Beef	Production Data Available	KG	16,053,314	18,208,488	15,639,440	15,793,423	16,654,600
Mutton: Goat & Sheep	Production Data Available	KG	624,376	638,685	620,319	514,342	542,167
Fish all types	Production Data Available	KG	10,257,631	10,257,552	8,500,000	10,000,000	n/a
Pork	Production Data Available	KG	4,740,956	5,925,989	7,047,678	7,246,527	6,688,127
Shrimp, Lobster, Conch, Crab etc	Production but no Data	KG					
Dairy							
Milk	Production Data Available	KG	31,549,427	35,162,640	40,041,960	24,676,686	20,728,379
Cream	Production but no Data	KG					
Yogurt	Production but no Data	KG					
Butter	Production but no Data	KG					
Cheese	Production but no Data	KG					
Condensed Milk	Production Data Available	KG	18,508,636	18,000,000	20,000,000	16,000,000	17,000,000
Ice Cream	Production but no Data	KG					
Canned & Preserved Foods							
Ham	Production Data Available	KG	197,000	100,000	104,000	162,000	179,000
Bacon	Production Data Available	KG	232,000	122,000	130,000	211,000	257,000
Sausages, Frankfurters, Bologna	Production Data Available	KG	2,845,000	1,041,000	1,463,000	2,226,000	2,746,000
Salted fish in brine	Production but no Data	KG					
Processed Corn	Production but no Data	KG					
Processed Beans	Production but no Data	KG					
Other Processed Vegetables	Production but no Data	KG					
Gussa Jams & Jellies	Production but no Data	KG					
Other Jams & jellies	Production but no Data	KG					
Preserved or Prepared Groundnuts	Production but no Data	KG					
Other Nuts Preserved	Production but no Data	KG					
Peanut Butter	Production but no Data	KG					
Preserved Merguez	Production but no Data	KG					
Preserved pineapples	Production but no Data	KG					
Preserved Citrus fruits	Production but no Data	KG					
Other Preserved Fruits	Production but no Data	KG					
Orange Juice not Concentrated	Production but no Data	LT					
Grapefruit Juice not Concentrated	Production but no Data	LT					
Lime Juice not Concentrated	Production but no Data	LT					
Other Citrus Juices	Production but no Data	LT					
Pineapple Juice not Concentrated	Production but no Data	LT					
Tomato Juice	Production but no Data	LT					
Grape Juice not Concentrated	Production but no Data	LT					
Apple Juice not Concentrated	Production but no Data	LT					
Passion Juice	Production but no Data	LT					
Mixed Juices	Production but no Data	LT					
Soya Sauce	Production but no Data	KG					
Tomato Ketchup	Production but no Data	KG					
Other Tomato Sauces	Production but no Data	KG					
Vinegar	Production but no Data	LT					
Pepper Sauces	Production but no Data	KG					
Mayonnaise	Production but no Data	KG					
Other Sauces	Production but no Data	KG					
Dried Soups	Production but no Data	KG					
Preparations of Malt	Production but no Data	KG					
Flavoured Powders for Making Beverages	Production but no Data	KG					
Other Food Preparations NES	Production but no Data	KG					
Coffee Beans	Production Data Available	KG	9,437,000	9,505,000	10,501,000	9,114,000	15,364,000
Instant coffee	Production but no Data	KG					
Tea	Production but no Data	KG					
Salt	Production but no Data	KG					
Grinding of Cereals							
Flour	Production Data Available	MT	146,797	145,470	144,289	147,123	134,121
Bakery Products							
Biscuits Unsweetened	Production but no Data	KG					
Biscuits Sweetened	Production but no Data	KG					
Ice Cream Cones	Production but no Data	KG					
Mixes & Doughs	Production but no Data	KG					
Pasts	Production but no Data	KG					
Other Bakers Wares	Production but no Data	KG					
Yeasts	Production but no Data	KG					
Baking Powders	Production but no Data	KG					

Table 5.4

Other Food Preparations of Flour & Meal	Production but no Data	KG						
Corn Processing								
Corncmeal	Production Data Available	MT	20,755	18,110	15,082	14,133	13,059	
Edible Oils & Greases								
Soyabean Oil	Production Data Available	LT	8,884,200	5,026,450	5,794,600	4,781,000	5,370,400	
Coconut Oil	Production Data Available	LT	4,783,800	2,706,550	2,483,400	2,049,000	2,301,600	
Edible Fats	Production Data Available	KG	9,137,000	8,414,000	6,299,000	7,279,000	6,614,000	
Cereals								
Rice	Production but no Data	MT						
Sugar								
Cane Sugar (brown)	Production Data Available	MT	243,102	228,396	219,046	224,412	248,558	
Flavoured Sugar Syrups	Production but no Data	KG						
Cocoa, Chocolate & candy								
Chewing Gum	Production but no Data	KG						
Other sugar confectionery not contain	Production but no Data	KG						
Confectionery	Production but no Data	KG						
Cocoa Powder unsweetened	Production but no Data	KG						
Cocoa Powder sweetened	Production but no Data	KG						
Other Cocoa Preparations	Production but no Data	KG						
Cocoa Beans	Production Data Available	KG	4,757,000	6,418,000	5,366,000	7,353,000	4,724,000	
Beverages								
Rum	Production Data Available	LT (000)	18,472	16,196	20,556	21,074	20,378	
Other Alcoholic Beverages	Production Data Available	LT (000)	1,855	1,600	1,771	1,326	947	
Beer & Stout & Malt Beverages	Production Data Available	LT (000)	71,553	82,832	78,607	75,988	66,159	
Aerated Waters	Production Data Available	LT (000)	49,936	52,040	48,649	55,728	48,888	
Mineral Water	Production but no Data	LT						
Tobacco								
Cigars (Import & Export data in KG)	Production Data Available	000	7,817	7,482	8,669	11,456	16,588	
Cigarettes (Import & Export data in KG)	Production Data Available	000	1,218,909	1,298,580	1,223,643	1,273,189	1,212,555	
Textiles of hard fibres								
Table Linen	Production but no Data	KG						
Draper	Production but no Data	KG						
Textiles of soft fibres excl. Knits								
Cotton	Production Data Available	SQ MT	1,441,560	1,166,500	0	492,000	231,500	
Poly/Cotton	Production Data Available	SQ MT	1,441,560	1,166,500	0	492,000	231,500	
Bed Linens	Production but no Data	KG						
Bedspreeds	Production but no Data	KG						
Carpets	Production but no Data	SQ MT						
Knitted Textiles								
Terry (includes fabric and finished tow)	Production but no Data	SQ MT						
Leather Manufacturing								
Articles of Leather excluding Shoes	Production but no Data	KG						
Garment Manufacturing								
Male								
Suits & Jackets	Production but no Data	NO						
Trousers & Shorts	Production but no Data	NO						
Shirts	Production but no Data	NO						
Knitted trousers & shorts	Production but no Data	NO						
Knitted Shirts	Production but no Data	NO						
Swimwear	Production but no Data	NO						
Female								
Suits & Jackets	Production but no Data	NO						
Trousers & Shorts	Production but no Data	NO						
Dresses	Production but no Data	NO						
Skirts	Production but no Data	NO						
Shirts & blouses	Production but no Data	NO						
Knitted Skirts	Production but no Data	NO						
Knitted trousers & shorts	Production but no Data	NO						
Knitted Blouses & shirts	Production but no Data	NO						
Swimwear	Production but no Data	NO						
Underwear								
T Shirts	Production but no Data	NO						
Hats/Caps	Production but no Data	NO						
Handkerchiefs	Production but no Data	NO						
Footwear								
Plastic & Rubber & Other	Production Data Available	Pairs	436,000	190,000	287,000	n/a	n/a	
Leather	Production Data Available	Pairs	436,000	190,000	287,000	n/a	n/a	
Manufacturing & repair of wood fu								
Paper Manufacturing								
Toilet Paper	Production but no Data	KG						
Tissue and Paper Towels	Production but no Data	KG						
Paper Napkins	Production but no Data	KG						
Paper Sacks	Production but no Data	KG						
Printing								
Leaflets & Brochures	Production but no Data	KG						
Postcards	Production but no Data	KG						
Chemicals								

Table 5.4

Paint	Production Data Available	LT	6,461,000	7,265,000	7,868,000	8,391,000	7,717,000
Putty	Production Data Available	KG	9,000	15,000	13,000	20,000	12,000
Sospe	Production Data Available	KG	2,117,000	2,615,000	3,722,000	3,613,000	877,000
Detergents	Production Data Available	KG	6,537,000	8,071,000	6,660,000	5,465,000	2,444,000
Matches	Production but no Data	100 packs					
Furniture & Wood Floor Polishes	Production but no Data	KG					
Other Polishes	Production but no Data	KG					
Disinfectants	Production but no Data	KG					
Bleaches	Production but no Data	KG					
Plastics							
Plastic Furniture	Production but no Data	KG					
Plastic Bas & Sacks	Production but no Data	KG					
Crates & Boxes	Production but no Data	KG					
Cups	Production but no Data	KG					
Cups, Forks, Plates, Knives Etc	Production but no Data	KG					
Drinking Straws	Production but no Data	KG					
Other Plastic & Kitchenware	Production but no Data	KG					
Buckets, Ashtrays, Flower Pots, Dustbi	Production but no Data	KG					
Other Plastic Articles	Production but no Data	KG					

Table 6.3

HONDURAS
PRODUCTION PROJECT 1995-2000
(In Thousand of Dollars)

Industrial Branches	1994	1995	1996	1997	1998	1999	2000	T. A. 2000/95
31. Food and Drinks	737,369	752,520	777,611	803,609	830,548	858,463	887,396	3.4
3111. Industry of the Meat	126,646	124,113	127,464	130,906	134,440	138,070	141,798	2.7
3112. Milk Products	70,601	76,249	78,689	81,207	83,806	86,487	89,255	3.2
3113. Preserves of fruit and packed vegetables	28,919	29,787	30,591	31,417	32,265	33,137	34,031	2.7
3114/6 Cereal & Cereal Preparations	127,395	124,847	127,968	131,167	134,447	13,788	141,253	2.5
3115. Bread Products	43,411	43,845	45,380	46,968	48,612	50,313	52,074	3.5
3117. Oils and edible fats	84,705	80,470	83,528	86,702	89,997	93,416	96,966	3.8
3118. Sugar-bowl industry	63,302	72,164	75,772	79,361	83,539	87,716	92,102	5.0
3119. Other foods	6,799	6,935	7,247	7,573	7,914	8,270	8,642	4.5
3121. Other Edible Products and Preparations	52,216	53,782	56,740	59,861	63,153	66,626	70,291	5.5
3130. Drinks	44,512	47,183	48,904	49,862	51,258	52,694	54,169	2.8
3131. Beverages No Alcoholic Industry	67,322	72,035	74,196	76,422	78,715	81,076	83,508	3.0
3140. Tobacco & Cigarettes	21,541	21,110	21,532	21,963	22,402	22,850	23,307	2.0
32. Textile industry	161,574	169,008	175,158	181,541	188,160	195,030	202,158	3.6
3211. Textile Yarn, Fabric & Clothing	23,180	25,498	26,773	28,112	29,517	30,993	32,543	5.0
3212. Articles except textile pledges	116	124	131	139	147	156	166	6.0
3213. Fabrication of carpets and tapestries	0	0	0	0	0	0	0	0.0
3214. Points fabrics	5,268	5,479	5,643	5,813	5,987	6,167	6,352	3.0
3220. Pledges of getting dressed	113,527	118,068	122,200	126,477	130,904	135,486	140,228	3.5
3230. Article of Leather & Leather Industry	11,455	11,570	11,894	12,277	12,569	12,921	13,283	2.8
3240. Industry of the leather Footwear	8,028	8,269	8,517	8,773	9,036	9,307	9,586	3.0
33. Wood and furniture	118,762	122,325	129,409	136,906	144,840	153,236	162,119	5.8
3311. Sawmills and carpenteries	81,624	84,073	89,117	94,464	100,132	106,140	112,258	6.0
3312/9. Cork and wood Manufactures, Excluding	12,597	12,769	13,535	14,347	15,208	16,121	17,088	6.0
3320. Furniture & Parts Thereof	24,741	25,483	26,737	28,093	29,500	30,975	32,523	5.0
34. Paper and printed	95,679	107,893	113,002	118,369	124,004	129,923	136,141	4.8
3410/9. Paper, Paperboard and articles of paper	65,141	74,912	79,032	83,379	87,963	92,803	97,907	5.5
3420. Printed on editorial	30,538	32,981	33,970	34,990	36,039	37,120	38,234	3.0
35. Chemical Industry	88,367	98,012	103,365	109,013	114,972	121,260	127,893	5.5
3513. Artificial fibers and sintetics	0	0	0	0	0	0	0	0.0
3522/29. Other substances and chemical products	40,410	45,259	47,975	50,853	53,904	57,188	60,567	6.0
3560. Plastic Materials	47,957	52,753	55,391	58,160	61,068	64,122	67,328	5.0
36. Mineral products no metallic	899	917	972	1,030	1,092	1,158	1,227	6.0
3610/20. Pottery and ceramic	899	917	972	1,030	1,092	1,158	1,227	6.0
Totals	1,202,650	1,250,675	1,299,517	1,350,468	1,403,616	1,459,070	1,516,936	3.9

Table 6.4

JAMAICA

Projections of National Production of Products Manufactured in Jamaica used in the Tourist Industry							
PRODUCT		PROJECTIONS 1996 - 2000					
		UNITS	PRODUCTION				
			1996	1997	1998	1999	2000
Meat Industry							
Poultry Meat	Production Data Available	KG	42,809,400	44,093,682	45,857,429	47,921,014	50,317,064
Beef	Production Data Available	KG	16,821,146	16,989,357	17,159,251	17,330,844	17,504,152
Mutton: Goat & Sheep	Production Data Available	KG	544,878	547,602	550,340	553,092	555,857
Fish all types	Production Data Available	KG	12,000,000	12,500,000	13,000,000	13,500,000	14,000,000
Pork	Production Data Available	KG	6,721,568	6,755,176	6,788,952	6,822,897	6,857,011
Shrimp, Lobster, Conch, Crab etc.	Production but no Data	KG					
Dairy							
Milk	Production Data Available	KG	17,619,122	15,857,210	15,936,496	16,095,861	16,256,820
Cream	Production but no Data	KG					
Yoghurt	Production but no Data	KG					
Butter	Production but no Data	KG					
Cheese	Production but no Data	KG					
Condensed Milk	Production Data Available	KG	17,340,000	17,686,800	18,040,536	18,401,347	18,769,374
Ice Cream	Production but no Data	KG					
Canned & Preserved Foods							
Ham	Production Data Available	KG	187,950	197,348	207,215	217,576	228,454
Bacon	Production Data Available	KG	269,850	283,343	297,510	312,385	328,004
Sausages, Frankfurters, Bologna	Production Data Available	KG	2,800,920	2,856,938	2,914,077	2,972,359	3,031,806
Salted fish in brine	Production but no Data	KG					
Processed Corn	Production but no Data	KG					
Processed Beans	Production but no Data	KG					
Other Processed Vegetables	Production but no Data	KG					
Guava Jams & Jellies	Production but no Data	KG					
Other Jams & Jellies	Production but no Data	KG					
Preserved or Prepared Groundnuts	Production but no Data	KG					
Other Nuts Preserved	Production but no Data	KG					
Peanut Butter	Production but no Data	KG					
Preserved Mangoes	Production but no Data	KG					
Preserved pineapples	Production but no Data	KG					
Preserved Citrus fruits	Production but no Data	KG					
Other Preserved Fruits	Production but no Data	KG					
Orange Juice not Concentrated	Production but no Data	LT					
Grapefruit Juice not Concentrated	Production but no Data	LT					
Lime Juice not Concentrated	Production but no Data	LT					
Other Citrus Juices	Production but no Data	LT					
Pineapple Juice not Concentrated	Production but no Data	LT					
Tomato Juice	Production but no Data	LT					
Grape Juice not Concentrated	Production but no Data	LT					
Apple Juice not Concentrated	Production but no Data	LT					
Passion Juice	Production but no Data	LT					
Mixed Juices	Production but no Data	LT					
Soya Sauce	Production but no Data	KG					
Tomato Ketchup	Production but no Data	KG					
Other Tomato Sauces	Production but no Data	KG					
Vinegar	Production but no Data	LT					
Pepper Sauces	Production but no Data	KG					
Mayonnaise	Production but no Data	KG					
Other Sauces	Production but no Data	KG					
Dried Soups	Production but no Data	KG					
Preparations of Malt	Production but no Data	KG					
Flavored Powders for Making Beverages	Production but no Data	KG					
Other Food Preparations NES	Production but no Data	KG					
Coffee Beans	Production Data Available	KG	16,593,120	17,007,948	17,348,107	17,868,550	18,404,607
Instant coffee	Production but no Data	KG					
Tea	Production but no Data	KG					
Salt	Production but no Data	KG					
Grinding of Cereals							
Flour	Production Data Available	MT	135,462	138,171	140,935	143,754	146,629
Bakery Products							
Biscuits Unsweetened	Production but no Data	KG					
Biscuits Sweetened	Production but no Data	KG					
Ice Cream Cones	Production but no Data	KG					
Mixes & Doughs	Production but no Data	KG					
Pasta	Production but no Data	KG					
Other Bakers Wares	Production but no Data	KG					
Yeasts	Production but no Data	KG					
Baking Powders	Production but no Data	KG					
Other Food Preparations of Flour & Meal NES	Production but no Data	KG					
Corn Processing							
Corneal	Production Data Available	MT	13,190	13,321	13,455	13,589	13,725

Table 6.4

JAMAICA

Projections of National Production of Products Manufactured in Jamaica used in the Tourist Industry							
PRODUCT		PROJECTIONS 1996 - 2000					
		PRODUCTION					
		UNITS	1996	1997	1998	1999	2000
Edible Oils & Greases							
Soyabean Oil	Production Data Available	LT	5,424,104	5,505,466	5,588,048	5,671,868	5,756,946
Coconut Oil	Production Data Available	LT	2,186,520	2,077,194	2,056,422	2,056,422	2,056,422
Edible Fats	Production Data Available	KG	6,680,140	6,746,941	6,814,411	6,882,555	6,951,380
Cereals							
Rice	Production but no Data	MT					
Sugar							
Cane Sugar (brown)	Production Data Available	MT	265,000	271,625	279,774	288,167	299,604
Flavoured Sugar Syrups	Production but no Data	KG					
Cocoa, Chocolate & candy							
Chewing Gum	Production but no Data	KG					
Other sugar confectionery not containing cocoa	Production but no Data	KG					
Confectionery	Production but no Data	KG					
Cocoa Powder unsweetened	Production but no Data	KG					
Cocoa Powder sweetened	Production but no Data	KG					
Other Cocoa Preparations	Production but no Data	KG					
Cocoa Beans	Production Data Available	KG	4,724,000	4,724,000	4,724,000	4,724,000	4,724,000
Beverages							
Rum	Production Data Available	LT (000)	22,008	23,769	25,670	27,724	29,942
Other Alcoholic Beverages	Production Data Available	LT (000)	947	947	947	947	947
Beer & Stout & Malt Beverages	Production Data Available	LT (000)	66,821	68,157	70,883	73,719	77,405
Aerated Waters	Production Data Available	LT (000)	46,444	44,121	44,121	44,121	44,121
Mineral Water	Production but no Data	LT					
Tobacco							
Cigars (Import & Export data in KG)	Production Data Available	000	17,086	17,513	18,038	18,579	19,137
Cigarettes (Import & Export data in KG)	Production Data Available	000	1,212,555	1,212,555	1,212,555	1,212,555	1,212,555
Textiles of hard fibres							
Table Linens	Production but no Data	KG					
Drapes	Production but no Data	KG					
Textiles of soft fibres excl. Knits							
Cotton	Production Data Available	SQ MT	231,500	231,500	231,500	231,500	231,500
Poly/Cotton	Production Data Available	SQ MT	231,500	231,500	231,500	231,500	231,500
Bed Linens	Production but no Data	KG					
Bedspreads	Production but no Data	KG					
Carpets	Production but no Data	SQ MT					
Knitted Textiles							
Terry (includes fabric and finished towels etc.)	Production but no Data	SQ MT					
Leather Manufacturing							
Articles of Leather excluding Shoes	Production but no Data	KG					
Garment Manufacturing							
Male							
Suits & Jackets	Production but no Data	NO					
Trousers & Shorts	Production but no Data	NO					
Shirts	Production but no Data	NO					
Knitted trousers & shorts	Production but no Data	NO					
Knitted Shirts	Production but no Data	NO					
Swimwear	Production but no Data	NO					
Females							
Suits & Jackets	Production but no Data	NO					
Trousers & Shorts	Production but no Data	NO					
Dresses	Production but no Data	NO					
Skirts	Production but no Data	NO					
Shirts & blouses	Production but no Data	NO					
Knitted Skirts	Production but no Data	NO					
Knitted trousers & shorts	Production but no Data	NO					
Knitted Blouses & shirts	Production but no Data	NO					
Swimwear	Production but no Data	NO					
Uppers							
T Shirts	Production but no Data	NO					
Hats/Caps	Production but no Data	NO					
Handkerchiefs	Production but no Data	NO					
Footwear							
Plastic & Rubber & Other	Production Data Available	Pairs	200,000	200,000	200,000	200,000	200,000
Leather	Production Data Available	Pairs	200,000	200,000	200,000	200,000	200,000
Manufacturing & repair of wood furniture							
Paper Manufacturing							
Toilet Paper	Production but no Data	KG					
Tissue and Paper Towels	Production but no Data	KG					
Paper Napkins	Production but no Data	KG					
Paper Sacks	Production but no Data	KG					
Printing							

Table 6.4

JAMAICA

Projections of National Production of Products Manufactured in Jamaica used in the Tourist Industry							
PRODUCT		PROJECTIONS 1996 - 2000					
		UNITS	PRODUCTION				
			1996	1997	1998	1999	2000
Leaflets & Brochures	Production but no Data	KG					
Postcards	Production but no Data	KG					
Chemicals							
Paint	Production Data Available	LT	7,794,170	8,183,879	8,388,475	8,598,187	8,813,142
Putty	Production Data Available	KG	12,000	12,000	12,000	12,000	12,000
Soaps	Production Data Available	KG	0	0	0	0	0
Detergents	Production Data Available	KG	977,600	997,152	1,017,095	1,037,437	1,058,186
Matches	Production but no Data	100 packs					
Furniture & Wood Floor Polishes	Production but no Data	KG					
Other Polishes	Production but no Data	KG					
Disinfectants	Production but no Data	KG					
Bleaches	Production but no Data	KG					
Plastics							
Plastic Furniture	Production but no Data	KG					
Plastic Ben & Secks	Production but no Data	KG					
Crates & Bins	Production but no Data	KG					
Cups	Production but no Data	KG					
Cups, Forks Plates, Knives Etc	Production but no Data	KG					
Drinking Straws	Production but no Data	KG					
Other Plastic & Kitchenware	Production but no Data	KG					
Buckets, Ashtrays, Flower Pots, Dustbins etc.	Production but no Data	KG					
Other Plastic Articles	Production but no Data	KG					

Table 7.3

HONDURAS
PROJECTION OF APPARENT NATIONAL CONSUMPTION (ANC) 1995-2000
 (In Thousand of Dollars)

Industrial Branches	1994 1/	1995 2/	1996 3/	1997 3/	1998 3/	1999 4/	2000	T. A. 2000/95
31. Food and Drinks	791,814	816,159	841,231	867,105	893,812	921,380	949,838	3.1
3111. Industry of the Meat	97,148	100,062	102,164	105,538	108,388	111,314	114,320	2.7
3112. Milk Products	85,513	88,506	90,896	93,350	95,870	98,459	101,117	2.7
3113 Preserves of fruit and packed veget	31,062	32,201	33,006	33,831	34,677	35,544	36,132	2.5
3114/6 Cereal & Cereal Preparations	144,579	147,470	151,157	154,936	158,809	162,779	166,849	2.5
3115 Bread Products	49,108	49,992	51,492	53,037	54,628	56,267	57,955	3.0
3117 Oils and edible fats	92,372	94,220	97,047	99,958	102,957	106,045	109,227	3.0
3118 Sugar-based industry	64,760	65,050	68,692	71,440	74,297	77,269	80,360	4.0
3119 Other foods	10,322	10,838	11,272	11,723	12,191	12,679	13,186	4.0
3121 Other Edible Products and Prepara	89,192	91,780	95,004	100,324	104,639	109,536	114,486	4.5
3130 Drinks	48,156	50,560	52,077	53,639	55,248	56,906	58,613	3.0
3131 Beverages No Alcoholic Industry	69,754	74,640	76,879	79,186	81,561	84,008	86,528	3.0
3140 Tobacco & Cigarettes	9,828	9,750	9,945	10,144	10,347	10,554	10,765	2.0
32. Textile industry	223,104	237,230	244,973	252,971	261,237	269,780	278,606	3.3
3211 Textile Yarn, Fabric & Clothing	45,066	48,670	51	52,641	54,747	56,937	59,214	4.0
3212 Articles except textile pledges	5,441	5,710	5,910	6,117	6,331	6,552	6,782	3.5
3213 Fabrication of carpets and tapestries	428	490	515	540	567	596	625	5.0
3214 Points fabrics	3,745	4,040	4,121	4,203	4,287	4,373	4,460	2.0
3220 Pledges of getting dressed	145,705	154,400	159,032	163,803	168,717	173,779	178,992	3.0
3230 Article of Leather & Leather Intra	13,265	13,990	14,550	15,132	15,737	16,367	17,021	4.0
3240 Industry of the leather Footwear	9,454	9,930	10,228	10,535	10,851	11,176	11,512	3.0
33. Wood and furniture	90,120	93,270	99,510	106,171	113,283	120,879	128,988	6.7
3311 Boxmills and carpenteries	69,143	70,180	75,093	80,349	85,974	91,992	98,431	7.0
3312/9 Cork and wood Manufactures, E	7,181	8,610	9,213	9,858	10,547	11,286	12,076	7.0
3320 Furniture & Parts Thereof	13,796	14,480	15,204	15,964	16,762	17,601	18,481	5.0
34. Paper and printed	160,708	189,420	197,378	205,677	214,330	223,356	232,770	4.2
3410/9 Paper, Paperboard and articles of	126,382	151,660	158,485	165,617	173,099	180,857	188,996	4.5
3420 Printed an editorial	34,326	37,760	38,893	40,060	41,261	42,499	43,774	3.0
35. Chemical Industry	224,116	268,080	279,298	291,013	303,221	315,967	329,212	4.2
3513 Artificial fibers and sintetics	43,733	51,600	54,180	56,889	59,733	62,720	65,856	5.0
3522/29 Other substances and chemical	116,165	139,400	144,976	150,773	156,806	163,078	169,601	4.0
3560 Plastic Materials	64,218	77,080	80,142	83,349	86,682	90,149	93,755	4.0
36. Mineral products no metallic	17,296	20,750	21,788	22,877	24,021	25,222	26,483	5.0
3610/20 Pottery and ceramic	17,296	20,750	21,788	22,877	24,021	25,222	26,483	5.0
Totals	1,507,158	1,624,889	1,684,178	1,745,814	1,809,904	1,876,564	1,945,897	3.7

1/Historic Information, 2/Forecast Data, 3/ Project, 4/Acumulative year rate 2000/95

Table 7.4

JAMAICA

Projections of Apparent National Consumption of Products used in the Tourist Industry

PRODUCT		UNITS	PROJECTIONS 1995 - 2000					
			CONSUMPTION					
			1995	1996	1997	1998	1999	2000
Meat Industry								
Poultry Meat	Production Data Available	KG	81,388,922	85,458,368	89,731,286	92,423,225	95,195,922	98,051,799
Beef	Production Data Available	KG	21,830,110	22,048,411	22,268,895	22,491,584	22,716,900	22,943,665
Mutton: Goat & Sheep	Production Data Available	KG	3,259,040	3,421,992	3,593,092	3,700,885	3,811,911	3,926,269
Fish all types	Production Data Available	KG	16,001,526	16,481,572	16,976,019	17,145,779	17,317,237	17,490,409
Pork	Production Data Available	KG	8,734,471	8,996,505	9,266,400	9,359,064	9,452,655	9,547,182
Shrimp, Lobster, Conch, Crab etc.	Production but no Data	KG	N/M					
Dairy								
Milk	Production Data Available	KG	25,159,045	25,662,226	26,175,470	26,698,980	27,232,959	27,777,619
Cream	Production but no Data	KG	130,763	134,686	138,726	140,114	141,513	142,930
Yoghurt	Production but no Data	KG	19,300	20,265	21,278	22,342	23,459	24,632
Butter	Production but no Data	KG	344,927	363,590	377,186	378,897	386,686	394,553
Cheese	Production but no Data	KG	2,445,735	2,494,650	2,569,489	2,595,184	2,621,136	2,647,348
Condensed Milk	Production Data Available	KG	17,204,994	17,721,144	18,232,779	18,435,306	18,619,659	18,805,856
Ice Cream	Production but no Data	KG	N/M	N/M	N/M	N/M	N/M	N/M
Canned & Preserved Foods								
Ham	Production Data Available	KG	203,763	209,876	216,172	222,657	229,337	233,924
Beacon	Production Data Available	KG	221,562	232,640	239,619	244,411	249,239	251,792
Sausages, Frankfurters, Bologna	Production Data Available	KG	2,677,215	2,811,076	2,895,409	2,982,271	3,041,916	3,102,755
Salted fish in brine	Production but no Data	KG	2,329,429	2,376,018	2,423,538	2,472,009	2,521,449	2,546,663
Processed Corn	Production but no Data	KG	N/M					
Processed Beans	Production but no Data	KG	N/M					
Other Processed Vegetables	Production but no Data	KG	N/M					
Okra Jams & Jellies	Production but no Data	KG	N/M					
Other Jams & Jellies	Production but no Data	KG	N/M					
Preserved or Prepared Groundnuts	Production but no Data	KG	N/M					
Other Nuts Preserved	Production but no Data	KG	N/M					
Peanut Butter	Production but no Data	KG	N/M					
Preserved Margarine	Production but no Data	KG	N/M					
Preserved pineapples	Production but no Data	KG	N/M					
Preserved Citrus fruits	Production but no Data	KG	N/M					
Other Preserved Fruits	Production but no Data	KG	N/M					
Orange Juice not Concentrated	Production but no Data	LT	N/M					
Grapefruit Juice not Concentrated	Production but no Data	LT	N/M					
Lime Juice not Concentrated	Production but no Data	LT	N/M					
Other Citrus Juices	Production but no Data	LT	N/M					
Pineapple Juice not Concentrated	Production but no Data	LT	N/M					
Tomato Juice	Production but no Data	LT	22,692	22,919	23,148	23,379	23,613	23,849
Grape Juice not Concentrated	Production but no Data	LT	61,799	62,417	63,041	63,671	64,308	64,951
Apple Juice not Concentrated	Production but no Data	LT	192,573	194,499	196,444	198,408	200,392	202,396
Passion Juice	Production but no Data	LT	N/M					
Mixed Juices	Production but no Data	LT	N/M					
Soya Sauce	Production but no Data	KG	N/M					
Tomato Ketchup	Production but no Data	KG	N/M					
Other Tomato Sauces	Production but no Data	KG	N/M					
Vinegar	Production but no Data	LT	N/M					
Pepper Sauces	Production but no Data	KG	N/M					
Mayonnaise	Production but no Data	KG	150,072	153,073	154,604	156,150	157,711	159,288
Other Sauces	Production but no Data	KG	N/M					
Dried Soups	Production but no Data	KG	N/M					
Preparations of Meat	Production but no Data	KG	N/M					
Flavoured Powders for Making Beverages	Production but no Data	KG	N/M					
Other Food Preparations NES	Production but no Data	KG	N/M					
Coffee Beans	Production Data Available	KG	N/M					
Instant coffee	Production but no Data	KG	N/M					
Tea	Production but no Data	KG	N/M					
Salt	Production but no Data	KG	N/M					
Grinding of Cereals								
Flour	Production Data Available	MT	151,197	154,221	157,305	158,878	160,467	162,072
Bakery Products								
Biscuits Unshortened	Production but no Data	KG	N/M					
Biscuits Shortened	Production but no Data	KG	N/M					
Ice Cream Cones	Production but no Data	KG	N/M					
Mixes & Doughs	Production but no Data	KG	116,025	117,185	119,529	121,919	123,138	124,370
Pasta	Production but no Data	KG	N/M					
Other Bakery Wares	Production but no Data	KG	N/M					
Yeasts	Production but no Data	KG	N/M					
Baking Powders	Production but no Data	KG	N/M					
Other Food Preparations of Flour & Meal NES	Production but no Data	KG	N/M					
Corn Processing								
Cornmeal	Production Data Available	MT	18,834	19,399	19,981	20,181	20,383	20,587
Edible Oils & Greases								

Table 7.4

JAMAICA

Projections of Apparent National Consumption of Products used in the Tourist Industry

PRODUCT		UNITS	PROJECTIONS 1995 - 2000					
			CONSUMPTION					
			1995	1996	1997	1998	1999	2000
Soybean Oil	Production Data Available	LT	10,941,578	11,488,656	11,718,430	11,952,798	12,072,326	12,193,049
Coconut Oil	Production Data Available	LT	1,421,103	710,552	703,446	696,412	689,448	682,553
Edible Fats	Production Data Available	KG	11,025,000	11,466,000	11,695,320	11,812,273	11,930,396	12,049,700
Cornstarch								
Rice	Production but no Data	MT	72,000	73,080	73,811	74,549	75,294	76,047
Other Cereals	Production but no Data	KG	913,975	959,673	983,665	1,003,338	1,023,405	1,043,873
Sugar								
Cane Sugar (brown)	Production Data Available	MT	99,301	100,294	101,297	102,310	103,333	104,367
Cane Sugar (refined)		MT	20,000	20,500	21,115	21,748	22,401	23,073
Flavoured Sugar Syrups	Production but no Data	KG	N/M					
Cocoa, Chocolate & candy								
Chewing Gum	Production but no Data	KG	N/M					
Other sugar confectionery not containing cocoa	Production but no Data	KG	N/M					
Confectionery	Production but no Data	KG	N/M					
Cocoa Powder unsweetened	Production but no Data	KG	N/M					
Cocoa Powder sweetened	Production but no Data	KG	N/M					
Other Cocoa Preparations	Production but no Data	KG	N/M					
Cocoa Beans	Production Data Available	KG	3,600,000	3,492,000	3,457,080	3,419,052	3,350,671	3,283,658
Beverages								
Rum	Production Data Available	LT (000)	8,078	8,320	8,736	9,173	9,632	10,113
Other Alcoholic Beverages	Production Data Available	LT (000)	2,112	2,238	2,306	2,375	2,446	2,519
Beer & Stout & Malt Beverages	Production Data Available	LT (000)	75,938	76,698	78,232	79,796	80,994	81,400
Aerated Waters	Production Data Available	LT (000)	72,624	74,803	77,047	79,358	81,739	84,191
Mineral Water	Production but no Data	LT	399,272	459,163	505,079	555,587	611,146	641,703
Tobacco								
Cigars (Import & Export data in KG)	Production Data Available	000						
Cigarettes (Import & Export data in KG)	Production Data Available	000						
Other Tobacco Products		KG						
Textiles of hard fibres								
Other textiles in the category		SQ MT	971,794	1,020,383	1,071,402	1,124,973	1,181,221	1,240,282
Laminated		SQ MT	1,807,102	1,897,457	1,992,330	2,091,946	2,196,544	2,306,371
Table Linens	Production but no Data	KG	237,000	248,850	261,293	274,357	282,588	291,065
Dresses	Production but no Data	KG	N/M					
Textiles of soft fibres excl. Knits								
Cotton	Production Data Available	SQ MT	17,063,965	18,770,361	20,647,397	21,679,767	22,763,755	23,901,943
Poly Cotton	Production Data Available	SQ MT	25,111,525	26,367,101	27,685,456	29,069,729	30,523,215	32,049,376
Bed Linens	Production but no Data	KG	171,242	179,805	185,199	190,755	196,477	202,372
Bedspreads	Production but no Data	KG	7,220	7,942	8,737	9,174	9,632	10,114
Carpets	Production but no Data	SQ MT	349,466	359,950	365,349	370,829	376,391	382,037
Knitted Textiles								
Terry (includes fabric and finished towels etc.)	Production but no Data	SQ MT	472,483	519,732	545,718	573,004	601,654	631,737
Other Knitted		SQ MT	4,516,063	4,741,866	4,978,960	5,227,908	5,489,303	5,763,768
Leather Manufacturing								
Articles of Leather excluding Shoes	Production but no Data	KG	N/M					
Cement Manufacturing								
Male								
Suits & Jackets	Production but no Data	NO	N/M					
Trousers & Shorts	Production but no Data	NO	N/M					
Shirts	Production but no Data	NO	N/M					
Knitted trousers & shorts	Production but no Data	NO	N/M					
Knitted Shirts	Production but no Data	NO	N/M					
Swimwear	Production but no Data	NO	N/M					
Females								
Suits & Jackets	Production but no Data	NO	N/M					
Trousers & Shorts	Production but no Data	NO	N/M					
Dresses	Production but no Data	NO	N/M					
Shirts	Production but no Data	NO	N/M					
Shirts & blouses	Production but no Data	NO	N/M					
Knitted Shirts	Production but no Data	NO	N/M					
Knitted trousers & shorts	Production but no Data	NO	N/M					
Knitted Blouses & shirts	Production but no Data	NO	N/M					
Swimwear	Production but no Data	NO	N/M					
Unisex								
T Shirts	Production but no Data	NO	N/M					
Hats/Caps	Production but no Data	NO	N/M					
Handkerchiefs	Production but no Data	NO	N/M					
Footwear								
Plastic & Rubber & Other	Production Data Available	Pairs	663,655	676,928	690,466	704,276	718,361	732,728
Leather	Production Data Available	Pairs	565,221	576,526	588,056	599,817	611,814	624,050
Sawmill Products excl Furniture								
Pine Board		Cub Mt	266,295	292,924	322,216	338,327	355,244	373,006
Plywood		Cub Mt	638,484	702,332	772,566	811,194	851,754	894,341

Table 7.4

JAMAICA

Projections of Apparent National Consumption of Products used in the Tourist Industry

PRODUCT		UNITS	PROJECTIONS 1995 - 2000					
			CONSUMPTION					
			1995	1996	1997	1998	1999	2000
Compressed fibreboard		KG	5,023,174	5,525,492	6,078,041	6,381,943	6,701,040	7,036,092
Other wood		Cub Mtr	13,400	16,080	19,297	21,226	23,349	25,684
Veneer		Cub Mtr	1,873	2,061	2,267	2,380	2,499	2,624
Other Wood products		KG	419,439	461,343	507,521	532,897	559,542	587,519
Manufacture of containers other than wood								
Drinking Glasses		KG	569,683	598,168	628,076	643,778	659,872	676,369
Crystal objects		KG	21,000	21,630	22,279	22,947	23,291	23,641
Manufacturing & repair of wood furniture	Production but no Data	KG	1,514,111	1,816,933	2,180,320	2,398,352	2,638,187	2,902,005
Paper Manufacturing								
Toilet Paper	Production but no Data	KG	NM					
Tissues and Paper Towels	Production but no Data	KG	NM					
Paper Napkins	Production but no Data	KG	NM					
Paper Sacks	Production but no Data	KG	NM					
Printing								
Leaflets & Brochures	Production but no Data	KG	NM					
Postcards	Production but no Data	KG	NM					
Synthetic & artificial fibres								
Beach Umbrellas		NO	21,300	23,430	25,773	27,062	28,415	29,836
Regular Umbrellas		NO	61,317	62,544	63,795	65,070	66,372	67,699
Chemicals								
Paint	Production Data Available	LT	9,340,743	10,088,003	10,895,043	11,766,649	12,354,981	12,972,731
Putty	Production Data Available	KG	47,500	51,300	55,404	57,620	59,923	62,322
Seeps	Production Data Available	KG	9,752,322	9,996,130	10,096,091	10,197,052	10,299,022	10,402,012
Decorations	Production Data Available	KG	9,253,720	9,623,869	10,008,824	10,209,000	10,413,180	10,621,444
Matches	Production but no Data	100 packs	NM					
Furniture & Wood Floor Polishes	Production but no Data	KG	NM					
Other Polishes	Production but no Data	KG	NM					
Disinfectants	Production but no Data	KG	NM					
Bleaches	Production but no Data	KG	NM					
Plastics								
Plastic Furniture	Production but no Data	KG						
Plastic Ben & Seals	Production but no Data	KG	NM					
Crates & Boxes	Production but no Data	KG	NM					
Cups	Production but no Data	KG	NM					
Cups, Forks Plates, Knives Etc.	Production but no Data	KG	NM					
Drinking Straws	Production but no Data	KG	NM					
Other Plastic & Kitchenware	Production but no Data	KG	NM					
Buckets, Ashtrays, Flower Pots, Dustbins etc.	Production but no Data	KG	NM					
Other Plastic Articles	Production but no Data	KG	NM					

Table 8.1

BELICE
CARIBBEAN TOURISM INDUSTRY PROJECT
 (From Caribbean & Rest of the World)

UCI	DESCRIPTION	1,992				1,993				1,994				1,995				
		IMPORTS		EXPORTS		IMPORTS		EXPORTS		IMPORTS		EXPORTS		IMPORTS		EXPORTS		
		Qty	000 US\$	Qty	000 US\$	Qty	000 US\$	Qty	000 US\$	Qty	000 US\$	Qty	000 US\$	Qty	000 US\$	Qty	000 US\$	
3111	MEAT & MEAT PREPARATIONS	3,975,820	3,529	0	0	3,750,054	3,122	0	0	3,998,272	2,963	10	0	4,363,795	3,579	0	0	
	Frozen / Chilled (lbs)	185,234	255	0	0	67,574	82	0	0	79,157	69	10	0	175,935	159	0	0	
	Processed / canned (lbs)	3,790,586	3,274	0	0	3,682,480	3,040	0	0	3,919,115	2,894	0	0	4,187,860	3,420	0	0	
3112	MILK & DAIRY PRODUCTS	11,395,352	9,329	0	0	11,671,751	9,262	0	0	10,174,421	7,875	0	0	10,954,499	9,473	0	0	
	Fresh milk (lbs)	3,800,303	3,898	0	0	3,006,212	3,625	0	0	2,646,315	3,047	0	0	2,418,794	3,217	0	0	
	Condensed, Sweetened & unsweetened (lbs)	5,623,085	2,658	0	0	6,763,168	3,159	0	0	5,557,385	2,585	0	0	6,356,931	3,292	0	0	
	Natural Milk Products (lbs)	53,390	54	0	0	235,067	244	0	0	245,228	260	0	0	232,482	268	0	0	
	Butter (lbs)	86,960	319	0	0	117,017	159	0	0	104,129	128	0	0	152,855	164	0	0	
	Cheese (lbs)	1,831,614	2,400	0	0	1,550,287	2,075	0	0	1,621,364	1,855	0	0	1,773,437	2,532	0	0	
3114	CEREAL & CEREAL	44,255,118	2,238	66,050	3	41,961,671	5,786	0	0	46,783,602	6,375	354,406	58	16,775,370	6,542	852	2	
	Cereal (Rice, Corn Cobs) (lbs)	40,415,895	5	0	0	36,564,382	3,561	0	0	33,603,233	3,946	353,766	57	11,932,086	4,276	0	0	
	Flour (Wheat, Maize, Rye) (lbs)	590,778	211	66,050	3	596,456	196	0	0	8,415,479	243	0	0	999,834	271	0	0	
	Cereal Preparations (lbs)	2,137,725	1,281	0	0	3,327,213	1,180	0	0	3,011,318	1,123	300	1	2,094,335	1,150	0	0	
	Biscuits (Ice-cream cones, Bread) (lbs)	1,110,720	741	0	0	1,473,620	849	0	0	1,753,572	1,063	340	1	1,749,115	845	852	2	
3117	ANIMAL & VEGETABLE OILS &	4,495,675	1,907	2,748	3	3,645,181	1,508	545	1	3,867,975	1,607	2,535	5	3,876,041	1,729	962	2	
	Animal Oils and Fats (gals)	3,870,800	1,489	0	0	2,987,578	1,118	0	0	3,080,216	1,149	0	0	3,004,886	1,244	0	0	
	Vegetable Oils & Fats (gals)	624,875	418	2,748	3	657,603	390	545	1	787,759	458	2,535	5	871,155	485	962	2	
3118	SUGAR & SUGAR PREPARATIONS & HONEY	637,295	511	7,922,346	40,875	541,875	486	8,195,306	51,109	480,933	529	9,318,252	5,272	618,700	761	6,392,354	50,546	
	Sugar (LBS)	53,000	67	91,669	37,629	34	42	92,032	41,457	35	44	94,533	40	44	52	93,996	47,751	
	Other Products (honey, syrup, molasses) (lbs)	584,295	444	7,831,177	3,246	541,841	444	8,103,274	9,652	480,898	485	9,223,719	5,232	618,656	709	6,498,358	2,795	
3119	COFFEE, TEA, COCOA, SPICES AND MANUFACTURES THEREOF (lbs)	1,450,957	2,101	309,574	148	1,128,528	1,581	158,245	75	1,229,593	1,860	47,050	27	1,237,689	1,855	171,270	112	
	Coffee, tea, cocoa, spices and manufactures thereof (lbs)	1,450,957	2,101	309,574	148	1,128,528	1,581	158,245	75	1,229,593	1,860	47,050	27	1,237,689	1,855	171,270	112	
3121	OTHER EDIBLE PRODUCTS AND PREPARATIONS	7,693,044	6,435	66,465	86	8,141,708	6,743	73,065	97	8,918,325	6,720	191,759	182	9,348,456	7,173	180,407	137	
	Margarine (lbs)	1,124,288	713	0	0	957,443	614	0	0	1,133,550	645	0	0	1,510,661	791	0	0	
	Homogenized Vegetables & Fruits (lbs)	1,635,931	746	0	0	1,998,088	842	0	0	2,256,868	938	0	0	2,358,379	1,089	0	0	
	Sauces, Soups & Others (lbs)	2,523,951	1,938	66,465	86	2,715,791	1,993	73,065	97	2,971,046	1,733	191,666	182	3,024,991	1,965	180,407	137	
	Prepared Products (lbs)	770,115	582	0	0	559,805	381	0	0	648,499	393	0	0	645,577	391	0	0	
	Infant Products (lbs)	1,542,129	2,347	0	0	1,664,587	2,620	0	0	1,502,631	2,543	93	0	1,469,719	2,597	0	0	
	Malt Extract & Preparation (lbs)	96,650	109	0	0	245,994	293	0	0	405,731	468	0	0	298,849	340	0	0	
3130	BEVERAGES	377,801	2,143	38	1	427,016	2,900	20	0	623,540	1,792	386	3	634,917	2,310	1,519	66	
	Aerated (Non-alcoholic) (gals)	151,160	389	18	1	200,816	537	9	0	490,676	376	12	0	489,207	353	0	0	
	Non-Aerated (non-alcoholic) (gals)	36,244	207	0	0	33,698	206	0	0	18,617	104	0	0	26,987	159	0	0	
	Wines (gals)	23,396	268	0	0	24,794	389	0	0	24,186	363	0	0	19,803	271	0	0	
	Beers / Stouts & Cider (gals)	136,423	716	20	0	115,956	752	11	0	78,060	571	370	3	73,752	513	60	0	
	Whiskies (gals)	4,844	171	0	0	33,134	676	0	0	N/A	N/A	0	0	13,185	618	0	0	
	Rum (gals)	9,634	176	0	0	6,576	85	0	0	N/A	N/A	4	0	1,973	44	1,459	66	
	Gin, Vodka, Brandy & Other Spirituous Drinks	9,100	216	0	0	12,042	255	0	0	12,001	378	0	0	10,010	352	0	0	
	3140	TOBACCO & CIGARETTES (lbs)	220,052	932	40	0	247,793	1,015	1,238	5	0	0	0	0	655,838	131	0	0
	Tobacco & Cigarettes (lbs)	220,052	932	40	0	247,793	1,015	1,238	5	N/A	N/A	0	0	655,838	131	0	0	
3211-142	TEXTILE YARN, FABRIC &	6,515,902	17,361	422,393	18,661	5,434,806	18,692	358,324	20,329	1,524,440	16,392	275,131	18	3,831,685	14,298	150,322	14,553	
	Yarns, Fibers (lbs)	726,863	1,549	88,767	115	948,072	2,111	0	0	797,815	1,746	0	0	1,665,161	1,540	0	0	
	Wovens (sq. Yds.)	4,002,897	4,199	0	0	3,865,826	4,635	2,024	12	3,512	2,986	0	0	1,405,446	2,070	0	0	

Table 8.1

BELICE
CARIBBEAN TOURISM INDUSTRY PROJECT
(From Caribbean & Rest of the World)

	Lace (yds)	43,425	8	0	0	46,166	7	0	0	16,156	5	0	0	30,477	6	0	0
	Sacks & Bags of Material (doz)	7,387	25	0	0	18,705	55	0	0	263,827	297	0	0	170,349	459	0	0
	Clothing (doz)	1,544,126	11,177	333,626	18,546	291,852	11,088	356,300	20,317	275,288	10,845	275,131	18	276,047	9,741	150,322	14,553
	Socks, Stocking, Gloves, Mitts (doz Pn.)	87,637	200	0	0	99,347	294	0	0	75,360	239	0	0	147,626	287	0	0
	Hats on other Headgear (No)	66,847	87	0	0	88,441	166	0	0	66,167	152	0	0	119,122	87	0	0
	Accessories (belts) (lbs)	36,720	117	0	0	76,397	316	0	0	26,315	122	0	0	17,457	108	0	0
3230	LEATHER & LEATHER MANUFACTURES (lbs)	8,436	45	0	0	9,040	43	0	0	10,638	38	0	0	16,629	29	0	0
3240	FOOTWEAR	431,889	1,381	0	0	467,699	1,377	0	0	460,790	1,328	0	0	332,851	1,038	0	0
	Dress, Sport, Sandals (pairs)	431,016	1,378	0	0	465,728	1,374	0	0	460,509	1,327	0	0	332,519	1,037	0	0
	Other parts of Footwear (lbs)	873	3	0	0	1,971	3	0	0	281	1	0	0	332	1	0	0
3312	CORK AND WOOD MANUFACTURES, EXCLUDING FURNITURE	1,581,556	1,914	444,917	1,079	2,535,865	3,385	226,857	1,165	6,165,866	2,401	177,510	1,517	3,320,692	2,025	200,073	323
	Cork (lbs)	2,180	9	0	0	6,142	15	0	0	2,093	7	0	0	2,451	8	0	0
	Playwood, Veneer Sheets (Cu. Ft.)	240,808	1,462	108,783	979	185,038	1,428	47,485	982	160,051	1,139	111,096	1,443	226,368	1,087	18,806	238
	Other Wood (lbs)	1,246,245	318	309,250	25	2,160,481	584	3,200	0	5,920,218	1,137	2,500	0	2,974,487	760	39,200	8
	Building Supply / Households (lbs)	92,323	125	26,884	75	184,204	1,358	176,172	183	83,504	118	63,914	74	117,386	170	142,067	77
3320	FURNITURE & PARTS THEREOF	10,947	1,456	412	58	45,034	1,473	552	141	10,646	1,711	2,403	7	12,790	2,283	271	101
	Household	1,629	276	37	8	2,797	314	43	8	2,758	301	58	6	4,646	491	97	30
	Schools / Churches / Offices (cwt)	2,004	326	0	0	2,701	509	1	0	2,275	508	1	0	1,685	625	1	0
	Other (cwt)	7,314	854	375	50	39,536	650	508	133	5,613	902	2,344	1	6,459	1,167	173	71
3410	PAPER, PAPERBOARD AND ARTICLES OF PAPER	12,178,007	7,110	0	0	13,905,224	6,867	0	0	13,100,941	7,100	4,028	7	11,120,971	7,088	0	0
	Pulp of paper or paperboard	12,178,007	7,110	0	0	13,905,224	6,867	0	0	13,100,941	7,100	4,028	7	11,120,971	7,088	0	0
3522	OTHER CHEMICAL PRODUCTS	7,313,872	6,397	0	0	6,616,391	6,293	825,000	64	9,548,161	6,660	529,895	62	8,806,584	6,223	3,913,443	144
	Painting (lbs)	650	7	0	0	89	0	0	0	2,161	6	0	0	1,135	2	0	0
	Perfumes (liq. Oz.)	68,836	N/A	0	0	141,436	60	0	0	140,020	151	0	0	162,921	174	0	0
	Soaps (lbs)	3,919,487	2,117	0	0	3,130,961	1,689	0	0	5,396,255	2,297	0	0	5,223,491	1,790	450	2
	Cosmetics (lbs)	965,349	1,389	0	0	908,068	1,462	0	0	1,257,240	1,431	0	0	1,253,255	1,383	924	30
	Coating Products (lbs)	2,539,257	2,802	0	0	2,415,054	2,973	0	0	2,729,271	2,694	0	0	2,132,771	2,774	0	0
	Matches (gross. Cont)	958	24	0	0	3,523	35	825,000	64	287	15	529,895	62	8,042	8	3,912,069	113
	Ink (lbs)	19,335	58	0	0	17,260	74	0	0	22,927	66	0	0	24,969	92	0	0
3560	PLASTIC MATERIALS	5,156,956	5,189	0	0	8,733,374	11,229	10	0	5,083,247	5,207	922	2	6,300,017	7,313	0	0
	Pipes, tubes, Adhesive Plates Hoses (lbs)	2,546,816	2,408	0	0	6,061,335	8,380	0	0	1,956,809	1,933	0	0	3,202,724	3,579	0	0
	Households (Kitchen & bathroom) (lbs)	2,222,095	2,006	0	0	2,190,491	2,047	10	0	2,511,923	2,416	922	2	2,437,178	2,779	0	0
	Builders Ware (lbs)	198,582	284	0	0	222,729	264	0	0	302,389	266	0	0	313,075	340	0	0
	Office Schools, Lab, Others (lbs)	189,463	491	0	0	258,819	538	0	0	312,126	592	0	0	347,040	615	0	0
3611	CERAMIC AND TILES	1,236,487	1,077	0	0	1,530,394	1,226	0	0	2,809,537	1,600	0	0	3,864,770	1,347	250	0
	Ceramics (plumbing) (No)	53,622	569	0	0	18,691	440	0	0	7,706	326	0	0	9,691	263	0	0
	Ceramic Tiles (lbs)	123,611	24	0	0	290,356	102	0	0	271,796	85	0	0	143,384	88	0	0
	Glazed / Unglazed Tiles & Mosaic Cubes	1,059,254	484	0	0	1,221,347	684	0	0	2,530,035	1,189	0	0	3,711,695	996	250	0

Table 9.3

HONDURAS
ORIGIN OF SOME INPUTS 1990
 (In %)

Industrial Branches	Production	Imports Intermedios			Total	Value Agregado
		National	Caribe	Other Countries		
31. Food and Drinks						
3111. Industry of the Meat	100	84.4	0.1	2.1	86.6	13.4
3118 Sugar-bowl industry	100	53.8	0	10.1	63.9	36.1
3119 Other foods	100	50.1	2.2	11.6	63.9	21.1
3130 Drinks	100	31.1	10.2	14.9	56.2	43.8
3140 Tobacco & Cigarettes	100	29.4	0.2	8.6	38.2	61.8
32. Textile industry						
3211 Textile Yarn, Fabric & Clothing	100	28.4	35	3	66.4	33.6
3220 Pledges of getting dressed	100	23	2.1	28.4	53.5	46.5
3230 Article of Leather & Leather industry	100	45.7	0.5	25.5	71.7	28.3
3240 Industry of the leather Footwear	100	50.8	6.5	15.3	72.6	27.4
33. Wood and furniture						
3311/9 Cork and wood manufactures	100	71.2	0.1	1.4	72.7	27.3
3320 Furniture & Parts Thereof	100	49.1	2.4	13.9	65.4	34.6
34. Paper and printed						
3410/9 Paper manufacturing	100	4.3	1.4	75	80.7	19.3
3420 Printed on editorial	100	18.6	5.8	37.2	61.6	38.4
35. Chemical Industry						
351/2 Chemical products	100	30	6.8	36.9	73.7	26.6
36. Mineral products no metallic						
36	100	56.7	0.1	6.2	63	37

Source: Funciones de Producción del Sector Industrial, Secplan, 1985, La Reconversión Industrial en Honduras, ONUDI 1993,
 With estimations of the national export

Table 9.4

JAMAICA

Products Manufactured in the Caribbean region that are Purchased by the Tourist Industry						
PRODUCT	UNITS	CONSUMPTION				
		1991	1992	1993	1994	1995
Meat Industry						
Fish all types	KG	14,060,531	13,994,619	13,533,820	15,535,462	16,001,526
Shrimp, Lobster, Conch, Crab etc.	KG	-25,205	-1,364,151	-2,109,532	-1,998,772	8,734,471
Dairy						
Yoghurt	KG	10,871	1,450	3,286	18,381	19,300
Condensed Milk	KG	17,969,452	17,292,104	19,188,781	15,640,904	744,927
Ice Cream	KG	330,947	-4,006	949	1,570	N/M
Canned & Preserved Foods						
Sausages, Frankfurters, Bologna	KG	2,530,175	637,180	1,489,693	2,549,729	2,677,215
Salted fish in brine	KG	124,374	1,111,267	266,734	2,283,754	2,329,429
Processed Corn	KG	-6,613	24,740	31,719	64,615	N/M
Processed Beans	KG	-1,876	23,812	17,681	89,971	N/M
Other Processed Vegetables	KG	-288,467	-236,387	-244,289	-240,639	N/M
Guava Jams & Jellies	KG	-80,079	-99,886	-82,380	-65,655	N/M
Other Jams & jellies	KG	40,490	41,611	38,342	50,075	N/M
Preserved or Prepared Groundnuts	KG	118,659	30,817	49,906	68,866	N/M
Other Nuts Preserved	KG	9,815	21,048	45,680	42,930	N/M
Peanut Butter	KG	67,321	41,234	107,782	87,318	N/M
Preserved Mangoes	KG	-91,055	-98,140	-12,872	-96,911	N/M
Preserved Citrus fruits	KG	-703,526	-991,123	-495,919	-4,898	N/M
Orange Juice not Concentrated	LT	-53,001	-22,025	15,258	113,754	N/M
Grapefruit Juice not Concentrated	LT	-590,872	-20,195	3,447	-44,053	N/M
Other Citrus Juices	LT	29,787	-29,071	-82,242	-228,335	N/M
Pineapple Juice not Concentrated	LT	9,072	43,060	9,739	-14,249	N/M
Passion Juice	LT	51	40,445	20	1,125	N/M
Mixed Juices	LT	-522,864	-764,530	-363,090	-424,132	N/M
Tomato Ketchup	KG	-430,832	-909,324	-395,589	-318,510	N/M
Mustard	KG	11,522	16,282	23,436	15,157	N/M
Vinegar	LT	526	6,608	18,167	19,685	N/M
Pepper Sauces	KG	-384,832	-522,471	-385,169	-441,022	N/M
Mayoannaise	KG	97,203	141,131	197,841	147,129	150,072
Other Sauces	KG	127,390	-223,991	-186,797	-215,128	N/M
Dried Soups	KG	-373,630	-355,807	-425,357	202,905	N/M
Preparations of Malt	KG	-403,011	-324,593	156,956	1,000,067	N/M
Other Food Preparations NES	KG	57,976	-84,091	388,928	208,615	N/M
Coffee Beans	KG	8,653,785	-1,105,783	9,380,508	-799,384	N/M
Instant coffee	KG	25,821	14,873	16,784	20,034	N/M
Grinding of Cereals						
Bakery Products						
Biscuits Unsweetened	KG	-547,601	-769,590	-723,801	-500,086	N/M
Biscuits Sweetened	KG	507,621	-313,424	-364,588	89,453	N/M
Ice Cream Cones	KG	27,929	13,687	11,506	14,184	N/M
Paste	KG	39,050	111,002	160,772	271,481	N/M
Other Bakers Wares	KG	-71,409	-237,944	-372,877	-456,258	N/M
Yeasts	KG	154,363	192,822	215,154	214,415	N/M
Baking Powders	KG	99	-3,945	-6,906	2,593	N/M
Other Food Preparations of Flour & Meal NES	KG	969,785	82,555	63,532	155,776	N/M
Corn Processing						
Edible Oils & Greases						
Soybean Oil	LT	11,302,415	6,012,635	4,914,445	10,420,550	11,488,656
Coconut Oil	LT	9,666,441	4,554,893	7,057,511	1,407,033	1,421,103
Edible Fats	KG	9,671,406	9,694,026	8,546,772	13,133,419	11,025,000
Cereals						
Rice	MT	84,360	73,363	81,008	68,548	72,000
Other Cereals	KG	125,690	220,474	469,001	870,452	913,975
Sugars						
Cocoa, Chocolate & candy						
Other sugar confectionery not containing cocoa	KG	323,352	116,977	285,406	810,324	N/M
Confectionery	KG	-224,689	-195,285	-98,159	88,036	N/M
Cocoa Powder sweetened	KG	-59,311	-48,955	-65,319	9,482	N/M
Beverages						
Rum	LT (000)	-953	4,040	7,674	7,843	8,078
Other Alcoholic Beverages	LT (000)	1,172	207	1,400	1,992	2,112
Beer & Stout & Malt Beverages	LT (000)	69,630	76,777	72,501	75,187	75,938
Aerated Waters	LT (000)	51,707	52,151	51,539	70,509	72,624
Mineral Water	LT	19,740	23,046	87,940	347,193	399,272
Tobacco						
Cigars (Import & Export data in KG)	000	-88,996	-80,873	-88,678	-119,658	
Cigarettes (Import & Export data in KG)	000	1,172,001	1,296,111	1,224,997	1,268,987	
Other Tobacco Products	KG	-25,072	-25,899	3,802	1,065	
Textiles of hard fibres						
Other	SQ MT	212,808	945,575	1,241,128	809,828	971,974
Laminated	SQ MT	1,504,747	2,613,672	1,410,758	1,571,393	1,807,102
Table Linen	KG	140,207	233,949	398,715	130,967	237,000

Table 9.4

JAMAICA

Products Manufactured in the Caribbean region that are Purchased by the Tourist Industry						
PRODUCT	UNITS	CONSUMPTION				
		1991	1992	1993	1994	1995
Drapes	KG	9,571	7,597	5,413	7,014	
Textiles of soft fibres excl. Knits						
Cotton	SQ MT	5,041,786	7,022,001	9,968,770	15,512,695	17,063,965
Poly/Cotton	SQ MT	17,823,905	20,673,826	24,692,530	22,828,639	25,111,525
Bed Linens	KG	51,363	71,528	157,245	163,088	171,242
Bedspreads	KG	4,853	10,378	5,263	6,017	7,220
Carpets	SQ MT	327,038	372,283	304,337	339,287	349,466
Knitted Textiles						
Tony	SQ MT	53,333	154,417	379,380	393,736	472,483
Other Knitted	SQ MT	1,818,606	5,499,132	6,689,403	4,105,512	4,516,063
Leather Manufacturing						
Articles of Leather excluding Shoes	KG	5,296	12,000	20,492	7,757	N/M
Garment Manufacturing						
Male						
Overcoats & wind jackets	NO	-20,967	2,572	5,290	6,608	N/M
Suits & Jackets	NO	-549,055	-467,934	-122,803	-140,504	N/M
Trousers & Shorts	NO	-1,240,979	-1,040,418	-491,071	-477,163	N/M
Shirts	NO	-451,792	-1,362,591	-1,429,094	-922,742	N/M
Underpants & briefs	NO	407,299	678,806	819,198	861,776	N/M
Pyjamas	NO	6,017	919	-69,162	-1,500	N/M
Bathrobes	NO	2,116	163	3,112	-21,926	N/M
Vests	NO	25,390	124,554	43,996	107,086	N/M
Other	NO	5,682	5,408	121,964	31,198	N/M
Knitted Suits	NO	10,819	2,692	311	962	N/M
Knitted jackets	NO	1,196	-35,674	-86,906	-30,013	N/M
Knitted trousers & shorts	NO	22,402	-119,604	-437,014	-324,444	N/M
Knitted Shirts	NO	-133,011	-208,187	-161,418	-164,397	N/M
Knitted underpants & briefs	NO	-1,428,708	-2,181,227	-576,340	-696,574	N/M
Knitted nightwear	NO	496	348	-19,212	-157,564	N/M
Socks	NO	301,230	313,902	457,723	444,188	N/M
Swimwear	NO	-9,673	3,580	-6,625	6,793	N/M
Females						
Overcoats & wind jackets	NO	-93,995	463	3,880	12,771	N/M
Suits & Jackets	NO	-29,227	-21,027	-26,426	2,916	N/M
Trousers & Shorts	NO	-2,080,969	-1,082,569	-1,194,520	-404,482	N/M
Dresses	NO	-120,124	-149,722	-104,333	-219,433	N/M
Skirts	NO	-160,103	-71,262	-181,625	-3,565	N/M
Shirts & blouses	NO	-164,008	-299,465	-329,633	-139,882	N/M
Slips & petticoats	NO	-16,628	160	199,017	267,726	N/M
Sleepwear	NO	-262,338	-324,834	-231,254	-1,571,283	N/M
N negligees & Bathrobes	NO	-587,649	-911,046	-1,592,183	-1,440,008	N/M
Other	NO	-4,463,192	-2,197,067	-167,762	62,100	N/M
Knitted Suits	NO	4,984	2,606	-9	1,683	N/M
Knitted jackets	NO	-26	-12,236	85	19	N/M
Knitted Dresses	NO	1,925	-29,482	-50,727	-23,741	N/M
Knitted Skirts	NO	-8,537	-10,056	-12,156	-7,987	N/M
Knitted trousers & shorts	NO	-103,135	-302,055	-763,748	-341,855	N/M
Knitted Blouses & shirts	NO	-136,550	-439,426	-378,726	-354,195	N/M
Knitted petticoats, slips etc	NO	-14,772	-3,563	-2,382	-64,862	N/M
Knitted underpants & briefs	NO	-1,746,228	-10,976,754	-10,941,206	-12,051,211	N/M
Knitted nightwear	NO	-141,118	-482,545	-494,536	-1,131,933	N/M
Knitted Bathrobes	NO	-76,187	-274,979	-277,004	-253,494	N/M
Knitted Other	NO	-675,856	-1,030,437	-17,923	-8,388	N/M
Pantyhose	NO	-24,761,240	-35,925,707	-54,603,207	-84,416,225	N/M
Swimwear	NO	2,274	27,946	3,623	10,878	N/M
Foundation Garments	NO	-4,403,052	-10,050,047	-10,434,808	-12,159,125	N/M
Unisex						
T Shirts	NO	-16,121,590	-42,641,174	-37,218,516	-45,434,763	N/M
Treck Suits	NO	-2,809	-320	773	-40,658	N/M
Jerseys/Pullovers	NO	-341,209	-647,492	-385,094	-437,189	N/M
Hats/Caps	NO	-5,410	149,288	0	259,293	N/M
Handkerchiefs	NO	46,632	126,766	356,955	70,599	N/M
Footwear						
Plastic & Rubber & Other	Pairs	618,285	516,346	397,899	632,052	663,655
Leather	Pairs	526,621	527,158	1,544,565	538,306	565,211
Sawnmill Products excl Furniture						
Pine Board	Cub Mt	90,204	76,200	211,769	242,086	226,295
Plywood	Cub Mt	17,273	11,075	15,635	580,440	638,484
Compressed fibreboard	KG	6,694,694	4,314,900	4,453,946	4,565,522	5,023,174
Other wood	Cub Mt	18,945	8,178	11,591	11,167	13,400
Veneer	Cub Mt	2,136	921	1,611	1,703	1,873
Other Wood products	KG	147,026	87,483	115,391	381,308	419,439
Manufacture of containers other than wood						
Manufacturing & repair of wood furniture	KG	-66,880	100,828	896,314	1,261,759	1,514,111

Table 9.4

JAMAICA

Products Manufactured in the Caribbean region that are Purchased by the Tourist Industry						
PRODUCT	UNITS	CONSUMPTION				
		1991	1992	1993	1994	1995
Paper Manufacturing						
Toilet Paper	KG	673,122	360,612	277,545	1,679,331	N/M
Tissue and Paper Towels	KG	170,960	87,724	64,601	438,886	N/M
Paper Napkins	KG	36,793	60,969	89,265	95,603	N/M
Corrugated paperboard	KG	2,510,073	1,862,676	5,272,032	8,356,679	N/M
Coated and Laminated Paper & Paperboard	KG	5,928,410	7,794,570	9,036,234	8,762,635	
Folding Cartons	KG	4,260,806	3,642,793	3,428,496	2,794,386	N/M
Paper Sacks	KG	4,676,016	3,660,125	205,036	160,758	N/M
Printing						
Leaflets & Brochures	KG	688,606	1,255,196	1,329,788	1,543,999	N/M
Synthetic & artificial fibres						
Polypropylene Sacks	NO	420,850	130,051	-110,856	-384,499	N/M
Chemicals						
Paint	LT	6,490,899	7,388,684	7,992,673	8,648,838	9,340,745
Putty	KG	33,293	20,468	36,774	97,325	47,500
Soaps	KG	8,461,417	8,946,214	9,023,815	9,514,460	9,752,322
Detergents	KG	6,933,537	11,084,836	9,033,174	8,897,808	9,253,720
Matches	100 counts	106,154	106,154	111,883	-65,835	N/M
Inks	KG	193,591	193,591	224,210	231,043	N/M
Furniture & Wood Floor Polishers	KG	-4,185	11,795	5,925	69,255	N/M
Other Polishers	KG	8,434	-2,488	41,307	48,508	N/M
Disinfectants	KG	-7,943	-5,156	9,467	65,600	N/M
Bleaches	KG	191,024	17,452	120,499	377,684	N/M
Plastics						
Plastic Furniture	KG	94,163	89,742	122,508	74,131	N/M
Plastic Bags & Sacks	KG	401,515	457,639	508,210	737,651	N/M
Crates & Boxes	KG	85,477	80,974	-1,320	91,361	N/M
Bottles	KG	694,490	459,893	441,981	539,496	N/M
Carboys & Flasks	KG	522,327	363,807	268,164	295,559	N/M
Lids & Caps	KG	237,123	259,811	232,710	309,109	N/M
Other stoppers	KG	35,229	50,878	105,109	109,924	N/M
Other Packaging	KG	9,321	-359	178,785	102,990	N/M
Cups	KG	-5,763	-5,806	39,968	43,779	N/M
Cups, Forks Plates Knives Etc.	KG	-151,033	-113,106	-30,800	-101,411	N/M
Drinking Straws	KG	-11,047	-381	-4,057	-5,643	N/M
Other Plastic & Kitchenware	KG	-8,280	85,342	82,410	25,633	N/M
Buckets, Ashtrays, Flower Pots, Dustbins etc	KG	61,458	45,137	132,622	151,473	N/M
Other Plastic Articles	KG	239,411	220,177	276,556	379,018	N/M
Pottery & tiles excl. building materials						

Table 9.4

JAMAICA

Products Manufactured Outside the Region that are Purchased by the Tourist Industry					
PRODUCT	UNITS	CONSUMPTION			
		1991	1992	1993	1994
Meat Industry					
Poultry Meat	KG	60,241,406	57,031,733	70,988,395	77,513,259
Beef	KG	21,329,871	21,616,340	22,602,265	21,613,970
Mutton: Goat & Sheep	KG	1,788,973	1,571,160	2,722,006	3,103,848
Fish all types	KG	14,060,531	13,994,619	13,533,820	15,535,462
Pork	KG	5,483,943	7,368,353	8,622,207	8,480,059
Dairy					
Milk	KG	31,560,096	35,111,405	39,969,229	24,665,730
Cream	KG	46,319	136,920	152,636	128,199
Yogurt	KG	10,871	1,450	3,286	18,381
Butter	KG	749,676	611,508	771,511	726,738
Cheese	KG	1,759,541	2,811,590	4,610,597	2,390,748
Canned & Preserved Foods					
Ham	KG	245,708	103,510	81,357	197,828
Bacon	KG	235,000	122,000	-56,621	211,011
Sausages, Frankfurters, Bologna	KG	2,530,175	637,180	1,489,693	2,549,729
Canned Meats	KG	2,208,160	2,174,099	3,708,272	3,049,963
Dried & salted fish excluding cod	KG	22,705	22,527	3,469	2,133,455
Dried & salted cod	KG	2,491,416	1,274,245	3,184,028	649,483
Salted fish in brine	KG	124,374	1,111,267	266,734	2,283,754
Smoked Fish	KG	57,728	446,642	491,680	559,030
Canned Herring	KG	240,967	150,514	384,682	115,253
Canned Sardines	KG	3,355,263	2,054,893	2,533,677	1,712,024
Canned Mackerel	KG	3,039,730	3,557,728	2,995,368	3,810,853
Canned Tuna	KG	6,652	69,012	48,211	116,035
Other canned & preserved fish	KG	11,753	64,854	13,526	-1,580
Tomato Paste	KG	831,769	736,058	1,070,350	933,450
Processed Tomatoes	KG	174,841	120,877	30,615	43,093
Processed Corn	KG	-6,613	24,740	31,719	64,415
Processed Beans	KG	-1,876	23,812	17,681	89,971
Other Processed Vegetables	KG	-288,467	-236,387	-244,289	-240,639
Gelatin & Jellies	KG	-80,079	-99,886	-82,380	-65,653
Other Jams & Jellies	KG	40,490	41,611	38,342	50,075
Preserved or Prepared Groundnuts	KG	118,659	30,817	49,906	68,866
Other Nuts Preserved	KG	9,815	21,048	45,680	42,930
Peanut Butter	KG	67,321	41,234	107,782	87,318
Preserved pineapples	KG	-58,865	-25,706	9,626	26,967
Preserved Citrus fruits	KG	-703,526	-991,123	-495,919	-4,898
Other Preserved Fruits	KG	-777,810	-919,941	-831,480	-713,051
Orange Juice not Concentrated	LT	-53,001	-22,025	15,258	113,754
Grapefruit Juice not Concentrated	LT	-590,872	-20,193	3,447	-44,053
Lime Juice not Concentrated	LT	-2,095	165	4,530	19,673
Other Citrus Juices	LT	29,787	-29,071	-82,242	-228,335
Pineapple Juice not Concentrated	LT	9,072	43,060	9,739	-14,249
Tomato Juice	LT	-10,628	6,160	15,070	22,467
Grape Juice not Concentrated	LT	30,367	88,751	77,129	60,587
Apple Juice not Concentrated	LT	58,396	71,489	143,462	192,574
Passion Juice	LT	51	40,445	20	1,125
Mixed Juices	LT	-522,864	-764,530	-363,090	-424,132
Soya Sauce	KG	-15,498	-49,205	-6,187	6,281
Tomato Ketchup	KG	-430,832	-909,324	-395,589	-318,510
Other Tomato Sauces	KG	6,003	4,559	-13,893	26,614
Mustard	KG	11,522	16,282	23,436	15,157
Vinegar	LT	526	6,608	18,167	19,685
Mayonnaise	KG	97,203	141,131	197,841	147,129
Other Sauces	KG	127,390	-223,991	-186,797	-215,128
Liquid Soups	KG	16,140	13,279	45,184	-472,871
Dried Soups	KG	-373,630	-355,807	-425,357	202,905
Preparations of Milk	KG	-403,011	-324,593	156,956	1,000,067
Flavoured Powders for Making Beverages	KG	-132,130	30,053	-81,755	855,730
Other Food Preparations NES	KG	57,976	-84,091	388,928	208,615
Coffee Beans	KG	8,653,785	-1,105,783	9,380,508	-799,384
Instant coffee	KG	25,821	14,873	16,784	20,034
Tea	KG	123,497	84,095	135,648	144,869
Grinding of Cereals					
Flour	MT	147,400	146,705	148,151	148,232
Wheat Gluten	KG	18,318	1,440	3,892	7,303
Bakery Products					
Biscuits Sweetened	KG	507,621	-313,424	-364,588	89,453
Ice Cream Cones	KG	27,929	13,687	11,506	14,184
Mixes & Doughs	KG	-2,567	20,521	76,949	114,876
Pasta	KG	39,050	111,002	160,772	271,481
Other Bakers Wares	KG	-71,409	-237,944	-372,877	-456,258
Yeasts	KG	154,363	192,822	215,154	214,415

Table 9.4

JAMAICA

Products Manufactured Outside the Region that are Purchased by the Tourist Industry					
PRODUCT	UNITS	CONSUMPTION			
		1991	1992	1993	1994
Baking Powders	KG	59	-3,945	-6,906	2,593
Other Food Preparations of Flour & Meal NES	KG	969,785	82,555	63,532	155,776
Corn Processing					
Cornmeal	MT	21,233	18,664	16,343	18,286
Corn Starch	KG	913,148	1,191,269	1,216,413	1,136,271
Edible Oils & Greases					
Soyabean Oil	LT	11,302,415	6,012,635	4,914,445	10,420,550
Olive Oil	LT	18,798	24,633	35,719	2,010,604
Sunflower Oil	LT	16	2,774	4,965	4,359
Corn Oil	LT	767,272	773,255	341,560	471,459
Palm Oil	LT	1,372,172	2,539,543	82,026	2,600,949
Coconut Oil	LT	9,666,441	4,554,893	7,057,511	1,407,033
Other Oils	LT	103,480	310,714	406,693	2,050,891
Edible Fats	KG	9,671,406	9,694,026	8,546,772	13,133,419
Cereals					
Rice	MT	84,360	73,363	81,008	68,548
Other Cereals	KG	125,690	220,474	469,001	870,452
Sugar					
Cane Sugar (refined)	MT	24,020	6,475	31,752	15,425
Cocoa, Chocolate & candy					
Chewing Gum	KG	74,473	44,216	68,433	110,972
Other sugar confectionery not containing cocoa	KG	323,352	116,977	285,406	810,324
Confectionery	KG	-224,689	-195,285	-98,159	88,036
Cocoa Powder ground	KG	-59,311	-48,955	-65,319	9,482
Other Cocoa Preparations	KG	235,631	390,225	267,463	195,130
Beverages					
Other Alcoholic Beverages	LT (000)	1,172	207	1,400	1,992
Beer & Stout & Malt Beverages	LT (000)	69,630	76,777	72,501	75,187
Mineral Water	LT	19,740	23,046	87,940	347,193
Tobacco			0	0	
Cigars (import & export data in KG)	000	-88,996	-80,873	-88,678	-119,658
Cigarettes (import & export data in KG)	000	1,172,001	1,296,111	1,224,997	1,268,987
Other Tobacco Products	KG	-25,072	-25,899	3,802	1,065
Textiles of hard fibres					
Other	SQ MT	212,808	945,575	1,241,128	809,828
Laminated	SQ MT	1,504,747	2,613,672	1,410,758	1,571,393
Table Linen	KG	140,207	233,949	398,715	130,967
Drapes	KG	9,571	7,597	5,413	7,014
Textiles of soft fibres excl. Knits					
Cotton	SQ MT	5,041,786	7,022,001	9,968,770	15,512,693
Poly/Cotton	SQ MT	17,823,905	20,673,826	24,692,530	22,828,659
Bed Linens	KG	51,363	71,528	157,245	163,088
Bedspreads	KG	4,853	10,378	5,263	6,017
Carpets	SQ MT	327,038	372,283	304,337	339,287
Knitted Textiles					
Terry	SQ MT	53,333	154,417	379,380	393,736
Other Knitted	SQ MT	1,818,606	5,499,132	6,689,403	4,105,512
Leather Manufacturing					
Leather	KG	94,836	111,077	178,740	92,191
Articles of Leather excluding Shoes	KG	5,296	12,000	20,492	7,757
Garment Manufacturing					
Male					
Overcoats & wind jackets	NO	-20,967	2,572	5,290	6,608
Suits & Jackets	NO	-549,055	-467,934	-122,803	-140,504
Trousers & Shorts	NO	-1,240,979	-1,040,418	-491,071	-477,163
Shirts	NO	-451,792	-1,362,591	-1,429,094	-922,742
Underpants & briefs	NO	407,299	678,806	819,198	861,776
Pyjamas	NO	6,017	919	-69,162	-1,500
Bathrobes	NO	2,116	163	3,112	-21,926
Vests	NO	25,390	124,554	43,996	107,080
Other	NO	5,682	5,408	121,964	31,198
Knitted Suits	NO	10,819	2,692	311	962
Knitted jackets	NO	1,196	-35,674	-86,906	-30,013
Knitted trousers & shorts	NO	22,402	-119,604	-437,014	-324,444
Knitted Shirts	NO	-133,011	-208,187	-161,418	-164,397
Knitted underpants & briefs	NO	-1,428,708	-2,181,227	-576,340	-696,574
Knitted nightwear	NO	496	348	-19,212	-157,564
Socks	NO	301,230	313,902	457,723	444,188
Swimwear	NO	-9,673	3,580	-6,625	6,793
Female					
Overcoats & wind jackets	NO	-93,595	463	3,880	12,771
Suits & Jackets	NO	-29,227	-21,027	-26,426	2,916
Trousers & Shorts	NO	-2,080,969	-1,082,569	-1,194,520	-404,482
Dresses	NO	-120,124	-149,722	-104,333	-219,433

Table 9.4

JAMAICA

Products Manufactured Outside the Region that are Purchased by the Tourist Industry					
PRODUCT	UNITS	CONSUMPTION			
		1991	1992	1993	1994
Skirts	NO	-160,103	-71,262	-181,625	-3,565
Shirts & blouses	NO	-164,008	-259,465	-329,633	-139,882
Slips & petticoats	NO	-16,628	160	199,017	267,726
Sleepwear	NO	-262,338	-324,834	-231,254	-1,571,283
N negligees & bathrobes	NO	-587,649	-911,046	-1,392,183	-1,440,008
Other	NO	-4,463,192	-2,197,057	-167,762	62,100
Knitted Suits	NO	4,984	2,606	-9	1,683
Knitted jackets	NO	-26	-12,236	85	19
Knitted Dresses	NO	1,925	-29,482	-50,727	-23,741
Knitted Skirts	NO	-8,537	-10,056	-12,156	-7,987
Knitted trousers & shorts	NO	-103,135	-302,055	-763,748	-341,855
Knitted Blouses & shirts	NO	-136,550	-439,426	-378,726	-354,195
Knitted petticoats, slips etc	NO	-14,772	-3,563	-2,382	-64,862
Knitted underpants & briefs	NO	-1,746,228	-10,976,754	-10,941,206	-12,051,211
Knitted nightwear	NO	-141,118	-482,545	-494,536	-1,131,933
Knitted Bathrobes	NO	-76,187	-274,979	-277,004	-253,494
Knitted Other	NO	-675,856	-1,030,437	-17,923	-8,388
Pantyhoes	NO	-24,761,240	-35,925,707	-54,603,207	-84,416,225
Swimwear	NO	2,274	27,946	3,623	10,878
Foundation Garments	NO	-4,403,052	-10,050,047	-10,434,808	-12,139,125
Underwear					
T Shirts	NO	-16,121,590	-42,641,174	-37,218,516	-45,434,763
Track Suits	NO	-2,809	-320	773	-40,658
Jerseys /Pullovers	NO	-341,209	-647,492	-385,094	-437,189
Babies Garments	NO	-2,352,701	-2,340,753	-2,072,423	-2,424,139
Hats/Caps	NO	-5,410	189,288	0	259,293
Handkerchiefs	NO	46,632	126,766	356,955	70,599
Components for Garments	KG	7,253,784	10,187,967	11,022,629	884,544
Footwear					
Plastic & Rubber & Other	Pairs	618,285	516,546	397,899	632,052
Leather	Pairs	526,621	527,158	1,544,565	538,305
Sawmill Products excl Furniture					
Pine Board	Cub Mt	90,204	76,200	211,769	262,086
Plywood	Cub Mt	17,273	11,075	15,635	580,440
Compressed fibreboard	KG	6,694,694	4,314,900	4,453,946	4,566,522
Other wood	Cub Mt	18,945	8,178	11,591	11,167
Veneer	Cub Mt	2,136	921	1,611	1,703
Other Wood products	KG	147,026	87,483	115,391	381,308
Manufacture of containers other than wood					
Drinking Glasses	KG	316,564	289,005	1,066,173	517,894
Crystal objects	KG	17,983	26,726	22,050	7,365
Manufacturing & repair of wood furniture	KG	-66,880	100,828	896,314	1,261,759
Paper Manufacturing					
Paper	KG	14,229,270	15,884,239	17,920,987	17,516,200
Paperboard	KG	6,826,062	7,506,956	14,657,378	13,590,758
Toilet Paper	KG	673,122	360,612	277,545	1,679,331
Tissue and Paper Towels	KG	170,960	87,724	64,601	438,886
Paper Napkins	KG	36,793	60,969	89,265	95,603
Adhesive paper	KG	157,256	104,080	124,590	124,756
Coated and Laminated Paper & Paperboard	KG	5,928,410	7,794,570	9,036,234	8,762,635
Folding Cartons	KG	4,260,806	3,642,793	3,428,496	2,794,386
Paper Sacks	KG	4,676,016	3,660,125	205,036	160,758
Printing					
Leaflets & Brochures	KG	688,606	1,255,196	1,329,788	1,543,999
Postcards	KG	2,457	6,013	-2,341	532
Synthetic & artificial fibres					
Beach Umbrellas	NO	1,457	-4,740	50,596	19,364
Regular Umbrellas	NO	74,120	59,557	58,401	60,115
Chemicals					
Paints	LT	6,490,899	7,388,684	7,992,673	8,648,838
Pasty	KG	33,293	20,468	36,774	97,325
Soaps	KG	8,461,417	8,946,214	9,023,815	9,514,460
Detergents	KG	6,933,537	11,084,836	9,033,174	8,897,808
Matches	100 counts	106,154	106,154	111,883	-65,835
Inks	KG	193,591	193,591	224,210	231,043
Furniture & Wood Floor Polishes	KG	-4,185	11,795	5,925	69,255
Other Polishes	KG	8,434	-2,488	41,307	48,508
Disinfectants	KG	-7,943	-5,156	9,467	65,600
Bleaches	KG	191,024	17,452	120,499	377,684
Plastics					
Plastic Furniture	KG	94,163	89,742	122,508	74,131
Plastic Bags & Sacks	KG	401,515	457,639	508,210	737,651
Crates & Boxes	KG	85,477	80,974	-1,320	91,361
Bottles	KG	694,490	459,893	441,981	539,496

Table 9.4

JAMAICA

Products Manufactured Outside the Region that are Purchased by the Tourist Industry					
PRODUCT	UNITS	CONSUMPTION			
		1991	1992	1993	1994
Carboys & Flasks	KG	522,327	363,807	268,164	295,559
Lids & Caps	KG	237,123	259,811	232,710	309,109
Other stoppers	KG	35,229	50,878	105,109	109,924
Other Packaging	KG	9,321	-359	178,785	102,990
Cups	KG	-5,763	-5,806	99,988	43,779
Cups, Forks, Plates, Knives Etc	KG	-151,033	-113,106	-30,800	-101,411
Drinking Straws	KG	-11,047	-381	-4,057	-5,643
Other Plastic & Kitchenware	KG	-4,280	85,342	82,410	25,633
Buckets, Ashtrays, Flower Pots, Dustbins etc	KG	61,458	45,137	132,622	151,473
Other Plastic Articles	KG	239,411	220,177	276,556	379,018
Pottery & tiles excl. building materials					

Table 9.4

JAMAICA

Projections of Consumption of Products Manufactured in the Caribbean Region that are Purchased by the Tourist Industry							
PRODUCTS	UNITS	CONSUMPTION					
		1995	1996	1997	1998	1999	2000
Drapes	KG	N/M	N/M	N/M	N/M	N/M	N/M
Textiles of soft fibres excl. Knits							
Cotton	SQ MT	17,063,965	18,770,361	20,647,397	21,679,767	22,763,755	23,901,943
Poly Cotton	SQ MT	25,111,523	26,367,101	27,685,456	29,069,729	30,523,215	32,049,376
Bed Linens	KG	171,242	179,805	185,199	190,755	196,477	202,372
Bedspreads	KG	7,220	7,942	8,737	9,174	9,632	10,114
Carpets	SQ MT	349,466	359,950	365,349	370,829	376,391	382,037
Knitted Textiles							
Terry	SQ MT	472,483	519,732	545,718	573,004	601,654	631,737
Other Knitted	SQ MT	4,516,063	4,741,866	4,978,960	5,227,908	5,489,303	5,763,768
Leather Manufacturing							
Articles of Leather excluding Shoes	KG	N/M	N/M	N/M	N/M	N/M	N/M
Garment Manufacturing							
Male							
Overcoats & wind jackets	NO	N/M	N/M	N/M	N/M	N/M	N/M
Suits & Jackets	NO	N/M	N/M	N/M	N/M	N/M	N/M
Trousers & Shorts	NO	N/M	N/M	N/M	N/M	N/M	N/M
Shirts	NO	N/M	N/M	N/M	N/M	N/M	N/M
Underpants & briefs	NO	N/M	N/M	N/M	N/M	N/M	N/M
Pyjamas	NO	N/M	N/M	N/M	N/M	N/M	N/M
Bathrobes	NO	N/M	N/M	N/M	N/M	N/M	N/M
Vests	NO	N/M	N/M	N/M	N/M	N/M	N/M
Other	NO	N/M	N/M	N/M	N/M	N/M	N/M
Knitted Suits	NO	N/M	N/M	N/M	N/M	N/M	N/M
Knitted jackets	NO	N/M	N/M	N/M	N/M	N/M	N/M
Knitted trousers & shorts	NO	N/M	N/M	N/M	N/M	N/M	N/M
Knitted Shirts	NO	N/M	N/M	N/M	N/M	N/M	N/M
Knitted underpants & briefs	NO	N/M	N/M	N/M	N/M	N/M	N/M
Knitted nightwear	NO	N/M	N/M	N/M	N/M	N/M	N/M
Socks	NO	N/M	N/M	N/M	N/M	N/M	N/M
Swimwear	NO	N/M	N/M	N/M	N/M	N/M	N/M
Females							
Overcoats & wind jackets	NO	N/M	N/M	N/M	N/M	N/M	N/M
Suits & Jackets	NO	N/M	N/M	N/M	N/M	N/M	N/M
Trousers & Shorts	NO	N/M	N/M	N/M	N/M	N/M	N/M
Dresses	NO	N/M	N/M	N/M	N/M	N/M	N/M
Skirts	NO	N/M	N/M	N/M	N/M	N/M	N/M
Shirts & blouses	NO	N/M	N/M	N/M	N/M	N/M	N/M
Slips & petticoats	NO	N/M	N/M	N/M	N/M	N/M	N/M
Sleepwear	NO	N/M	N/M	N/M	N/M	N/M	N/M
N negligees & Bathrobes	NO	N/M	N/M	N/M	N/M	N/M	N/M
Other	NO	N/M	N/M	N/M	N/M	N/M	N/M
Knitted Suits	NO	N/M	N/M	N/M	N/M	N/M	N/M
Knitted jackets	NO	N/M	N/M	N/M	N/M	N/M	N/M
Knitted Dresses	NO	N/M	N/M	N/M	N/M	N/M	N/M
Knitted Skirts	NO	N/M	N/M	N/M	N/M	N/M	N/M
Knitted trousers & shorts	NO	N/M	N/M	N/M	N/M	N/M	N/M
Knitted Blouses & shirts	NO	N/M	N/M	N/M	N/M	N/M	N/M
Knitted petticoats, slips etc	NO	N/M	N/M	N/M	N/M	N/M	N/M
Knitted underpants & briefs	NO	N/M	N/M	N/M	N/M	N/M	N/M
Knitted nightwear	NO	N/M	N/M	N/M	N/M	N/M	N/M
Knitted Bathrobes	NO	N/M	N/M	N/M	N/M	N/M	N/M
Knitted Other	NO	N/M	N/M	N/M	N/M	N/M	N/M
Pantyhoes	NO	N/M	N/M	N/M	N/M	N/M	N/M
Swimwear	NO	N/M	N/M	N/M	N/M	N/M	N/M
Foundation Garments	NO	N/M	N/M	N/M	N/M	N/M	N/M
Unless							
T Shirts	NO	N/M	N/M	N/M	N/M	N/M	N/M
Treck Suits	NO	N/M	N/M	N/M	N/M	N/M	N/M
Jerseys /Pullovers	NO	N/M	N/M	N/M	N/M	N/M	N/M
Hats/Caps	NO	N/M	N/M	N/M	N/M	N/M	N/M
Handkerchiefs	NO	N/M	N/M	N/M	N/M	N/M	N/M
Footwear							
Plastic & Rubber & Other	Pairs	663,653	676,928	690,466	704,276	718,361	732,728
Leather	Pairs	565,211	576,526	588,056	599,817	611,814	624,050
Sawmill Products and Furniture							
Pine Board	Cub Mt	226,295	292,924	322,216	338,527	355,244	373,000
Plywood	Cub Mt	638,484	702,332	772,566	811,194	851,754	894,341
Compressed fibreboard	KG	5,023,174	5,525,492	6,078,041	6,381,943	6,701,040	7,036,092
Other wood	Cub Mt	13,400	16,080	19,297	21,226	23,349	25,684
Veneer	Cub Mt	1,873	2,061	2,267	2,380	2,499	2,624
Other Wood products	KG	419,439	461,383	507,521	532,897	559,542	587,519
Manufacture of containers other than wood							
Manufacturing & repair of wood furniture	KG	1,514,111	1,816,933	2,181,320	2,398,352	2,638,187	2,902,005

Table 9.4

JAMAICA

Projections of Consumption of Products Manufactured in the Caribbean Region that are Purchased by the Tourist Industry							
PRODUCTS	UNITS	CONSUMPTION					
		1995	1996	1997	1998	1999	2000
Paper Manufactures							
Toilet Paper	KG	N/M	N/M	N/M	N/M	N/M	N/M
Tissue and Paper Towels	KG	N/M	N/M	N/M	N/M	N/M	N/M
Paper Napkins	KG	N/M	N/M	N/M	N/M	N/M	N/M
Corrugated paperboard	KG	N/M	N/M	N/M	N/M	N/M	N/M
Coated and Laminated Paper & Paperboard	KG						
Folding Cartons	KG	N/M	N/M	N/M	N/M	N/M	N/M
Paper Sacks	KG	N/M	N/M	N/M	N/M	N/M	N/M
Printing							
Leaflets & Brochures	KG	N/M	N/M	N/M	N/M	N/M	N/M
Synthetic & artificial fibres							
Polypropylene Sacks	NO	N/M	N/M	N/M	N/M	N/M	N/M
Chemicals							
Paint	LT	9,340,745	10,088,005	10,895,045	11,766,649	12,354,981	12,972,731
Pasty	KG	47,500	51,300	55,404	57,620	59,925	62,332
Soaps	KG	9,752,322	9,996,130	10,096,091	10,197,052	10,299,022	10,402,012
Detergents	KG	9,253,720	9,623,869	1,008,824	10,209,000	10,413,180	10,621,444
Matches	100 counts	N/M	N/M	N/M	N/M	N/M	N/M
Inks	KG	N/M	N/M	N/M	N/M	N/M	N/M
Furniture & Wood Floor Polishes							
Other Polishes	KG	N/M	N/M	N/M	N/M	N/M	N/M
Disinfectants	KG	N/M	N/M	N/M	N/M	N/M	N/M
Bleaches	KG	N/M	N/M	N/M	N/M	N/M	N/M
Plastics							
Plastic Furniture	KG	N/M	N/M	N/M	N/M	N/M	N/M
Plastic Bags & Sacks	KG	N/M	N/M	N/M	N/M	N/M	N/M
Crates & Boxes	KG	N/M	N/M	N/M	N/M	N/M	N/M
Bottles	KG	N/M	N/M	N/M	N/M	N/M	N/M
Carboys & Flasks	KG	N/M	N/M	N/M	N/M	N/M	N/M
Lids & Caps	KG	N/M	N/M	N/M	N/M	N/M	N/M
Other stoppers	KG	N/M	N/M	N/M	N/M	N/M	N/M
Other Packaging	KG	N/M	N/M	N/M	N/M	N/M	N/M
Cups	KG	N/M	N/M	N/M	N/M	N/M	N/M
Cups, Forks, Plates, Knives Etc.	KG	N/M	N/M	N/M	N/M	N/M	N/M
Drinking Straws	KG	N/M	N/M	N/M	N/M	N/M	N/M
Other Plastic & Kitchenware	KG	N/M	N/M	N/M	N/M	N/M	N/M
Buckets, Ashtrays, Flower Pots, Dustbins etc	KG	N/M	N/M	N/M	N/M	N/M	N/M
Other Plastic Articles	KG	N/M	N/M	N/M	N/M	N/M	N/M
Pottery & tiles excl. building materials							

Table 9.4

JAMAICA

Projections of Consumption of Products Manufactured outside the Region used in the Tourist Industry								
PRODUCT	UNITS	PROJECTIONS 1995 - 2000						
		CONSUMPTION						
		1995	1996	1997	1998	1999	2000	
Meat Industry								
Poultry Meat	Production Data Available	KG	81,388,922	85,458,368	89,731,286	92,423,225	95,195,922	98,051,799
Beef	Production Data Available	KG	21,830,110	22,048,411	22,268,895	22,491,584	22,716,500	22,943,665
Mutton, Goat & Sheep	Production Data Available	KG	3,259,040	3,421,992	3,593,092	3,700,885	3,811,911	3,926,269
Fish all types	Production Data Available	KG	16,001,526	16,481,572	16,976,019	17,145,779	17,317,237	17,490,409
Pork	Production Data Available	KG	8,734,471	8,996,505	9,266,400	9,359,064	9,452,655	9,547,182
Dairy								
Milk	Production Data Available	KG	25,159,045	25,662,226	26,175,470	26,698,980	27,232,959	27,777,619
Cream		KG	130,763	134,686	138,726	140,114	141,515	142,930
Yoghurt	Production but no Data	KG	19,300	20,265	21,278	22,342	23,459	24,632
Butter		KG	744,927	763,550	771,186	778,897	786,686	794,553
Cheese	Production but no Data	KG	2,445,735	2,494,650	2,569,489	2,595,184	2,621,136	2,647,348
Canned & Preserved Foods								
Ham	Production Data Available	KG	203,763	209,876	216,172	222,657	229,337	233,924
Bacon	Production Data Available	KG	221,562	232,640	239,619	244,411	249,299	251,792
Sausages, Frankfurters, Bologna	Production Data Available	KG	2,677,215	2,811,076	2,895,409	2,982,271	3,041,916	3,102,755
Canned Meats		KG	3,110,962	3,173,182	3,204,913	3,236,962	3,269,332	3,302,025
Dried & salted fish excluding cod		KG	2,144,122	2,165,563	2,187,219	2,209,091	2,231,182	2,253,694
Dried & salted cod		KG	662,473	673,722	689,237	703,021	710,051	717,152
Salted fish in brine	Production but no Data	KG	2,529,429	2,576,018	2,423,538	2,472,009	2,521,469	2,546,663
Smoked Fish		KG	564,620	570,267	575,969	581,729	587,546	593,422
Canned Herrings		KG	227,250	229,523	231,818	234,136	236,477	238,842
Canned Sardines		KG	1,729,144	1,746,436	1,763,900	1,799,178	1,817,170	1,835,342
Canned Mackerel		KG	3,200,000	3,264,000	3,296,640	3,329,606	3,362,902	3,396,531
Canned Tuna		KG	65,000	66,300	67,626	68,302	68,985	69,675
Other canned & preserved fish		KG	18,000	18,360	18,544	18,729	18,916	19,105
Tomato Paste		KG	952,119	961,640	971,257	980,969	990,779	1,000,687
Processed Tomatoes		KG	45,000	456,000				
Processed Onions	Production but no Data	KG	N/M					
Processed Beans	Production but no Data	KG	N/M					
Other Processed Vegetables	Production but no Data	KG	N/M					
Guava Jams & Jellies	Production but no Data	KG	N/M					
Other Jams & Jellies	Production but no Data	KG	N/M					
Preserved or Prepared Groundnuts	Production but no Data	KG	N/M					
Other Nuts Preserved	Production but no Data	KG	N/M					
Peanut Butter	Production but no Data	KG	N/M					
Preserved pineapples	Production but no Data	KG	N/M					
Preserved Citrus fruits	Production but no Data	KG	N/M					
Other Preserved Fruits	Production but no Data	KG	N/M					
Orange Juice not Concentrated	Production but no Data	LT	N/M					
Grapefruit Juice not Concentrated	Production but no Data	LT	N/M					
Lime Juice not Concentrated	Production but no Data	LT	N/M					
Other Citrus Juices	Production but no Data	LT	N/M					
Pineapple Juice not Concentrated	Production but no Data	LT	N/M					
Tomato Juice	Production but no Data	LT	22,692	22,919	23,148	23,379	23,613	23,849
Grape Juice not Concentrated	Production but no Data	LT						
Apple Juice not Concentrated	Production but no Data	LT						
Passion Juice	Production but no Data	LT	N/M					
Mixed Juices	Production but no Data	LT	N/M					
Soya Sauce	Production but no Data	KG	N/M					
Tomato Ketchup	Production but no Data	KG	N/M					
Other Tomato Sauces	Production but no Data	KG	N/M					
Mustard		KG	15,460	15,769	15,927	16,086	16,247	16,410
Vinogar	Production but no Data	LT	N/M					
Mayonnaise	Production but no Data	KG	150,072	153,073	154,604	156,150	157,711	159,288
Other Sauces	Production but no Data	KG	N/M					
Liquid Soups		KG	N/M					
Dried Soups	Production but no Data	KG	N/M					
Preparations of Malt	Production but no Data	KG	N/M					
Flavoured Powders for Making Beverages	Production but no Data	KG	N/M					
Other Food Preparations NES	Production but no Data	KG	N/M					
Coffee Beans	Production Data Available	KG	N/M					
Instant coffee		KG	N/M					
Tea		KG						
Grinding of Cereals								
Flour	Production Data Available	MT	151,197	154,221	157,305	158,878	160,467	162,072
Wheat Gluten		KG						
Bakery Products								
Biscuits Sweetened	Production but no Data	KG	N/M					
Ice Cream Cones	Production but no Data	KG	N/M					
Mixes & Doughs	Production but no Data	KG	116,025	117,185	119,529	121,919	123,138	124,370
Pasta	Production but no Data	KG	N/M					
Other Bakery Wares	Production but no Data	KG	N/M					

Table 9.4

JAMAICA

Projections of Consumption of Products Manufactured outside the Region used in the Tourist Industry								
PRODUCT		UNITS	PROJECTIONS 1995 - 2000					
			CONSUMPTION					
Years:	Production but no Data	KG	N/M					
Baking Powders	Production but no Data	KG	N/M					
Other Food Preparations of Flour & Meal	Production but no Data	KG	N/M					
Corn Processing								
Cornmeal	Production Data Available	MT	18,834	19,399	19,981	20,181	20,383	20,587
Corn Starch		KG	1,193,085	1,252,739	1,277,794	1,303,349	1,316,383	1,329,547
Edible Oils & Greases								
Soybean Oil	Production Data Available	LT	10,941,578	11,488,656	11,718,430	11,952,798	12,072,326	12,193,049
Olive Oil		LT	35,000	35,700	36,414	36,778	37,146	37,517
Sunflower Oil		LT	4,577	4,806	4,926	5,049	5,100	-5,151
Corn Oil		LT	518,605	570,465	584,727	599,345	614,329	620,472
Palm Oil		LT	2,626,958	0	0	0	0	0
Coconut Oil	Production Data Available	LT	1,421,103	710,552	703,446	696,412	689,448	682,553
Other Oils		LT	1,948,346	1,850,929	1,813,911	1,759,493	1,706,708	1,672,574
Edible Fats	Production Data Available	KG	11,025,000	11,466,000	11,695,320	11,812,273	11,930,396	12,049,700
Cereals								
Rice	Production but no Data	MT	72,000	73,080	73,811	74,549	75,294	76,047
Other Cereals		KG	913,975	959,673	983,663	1,003,338	1,023,405	1,043,873
Sugars								
Cane Sugar (refined)		MT	20,000	20,500	21,115	21,748	22,401	23,073
Cocoa, Chocolate & candy								
Chewing Gum	Production but no Data	KG	N/M					
Other sugar confectionery not containing co	Production but no Data	KG	N/M					
Confectionery	Production but no Data	KG	N/M					
Cocoa Powder sweetened	Production but no Data	KG	N/M					
Other Cocoa Preparations	Production but no Data	KG	N/M					
Beverages								
Other Alcoholic Beverages	Production Data Available	LT (000)	2,112	2,238	2,306	2,375	2,445	2,519
Beer & Stout & Malt Beverages	Production Data Available	LT (000)	75,938	76,698	78,232	79,796	80,994	81,400
Mineral Water		LT	399,272	459,163	505,079	555,587	611,146	641,703
Tobacco								
Cigars (Import & Export data in KG)	Production Data Available	000						
Cigarettes (Import & Export data in KG)	Production Data Available	000						
Other Tobacco Products		KG						
Textiles of hard fibres								
Other textiles in the category		SQ MT	971,794	1,020,383	1,071,402	1,124,973	1,181,221	1,240,282
Laminated		SQ MT	1,807,102	1,897,457	1,992,330	2,091,946	2,196,544	2,306,371
Table Linen	Production but no Data	KG	237,000	348,850	261,293	274,357	282,588	291,065
Drapes	Production but no Data	KG	N/M					
Textiles of soft fibres excl. Knits								
Cotton	Production Data Available	SQ MT	17,063,965	18,770,361	20,647,397	21,679,767	22,763,755	23,901,943
Poly/Cotton	Production Data Available	SQ MT	25,111,525	26,367,101	27,685,456	29,069,729	30,523,215	32,049,376
Bed Linens	Production but no Data	KG	171,242	179,805	185,199	190,755	196,477	202,372
Bedspreads	Production but no Data	KG	7,220	7,942	8,737	9,174	9,632	10,114
Carpets	Production but no Data	SQ MT	349,466	359,930	365,349	370,829	376,391	382,037
Knitted Textiles								
Terry (includes fabric and finished towels)	Production but no Data	SQ MT	472,483	519,732	545,718	573,004	601,654	631,737
Other Knitted		SQ MT	4,516,063	4,741,866	4,978,960	5,227,908	5,489,303	5,763,768
Leather Manufacturing								
Leather								
Articles of Leather excluding Shoes	Production but no Data	KG	N/M					
Garment Manufacturing								
Male								
Overcoats & wind jackets	Production but no Data	NO						
Suits & Jackets	Production but no Data	NO	N/M					
Trousers & Shorts	Production but no Data	NO	N/M					
Shirts	Production but no Data	NO	N/M					
Under pants & briefs	Production but no Data	NO						
Pyjamas	Production but no Data	NO						
Bedrobes	Production but no Data	NO						
Vests	Production but no Data	NO						
Other	Production but no Data	NO						
Knitted trousers & shorts	Production but no Data	NO	N/M					
Knitted Shirts	Production but no Data	NO	N/M					
Swimwear	Production but no Data	NO	N/M					
Females								
Suits & Jackets	Production but no Data	NO	N/M					
Trousers & Shorts	Production but no Data	NO	N/M					
Dresses	Production but no Data	NO	N/M					
Skirts	Production but no Data	NO	N/M					
Shirts & blouses	Production but no Data	NO	N/M					
Knitted Skirts	Production but no Data	NO	N/M					
Knitted trousers & shorts	Production but no Data	NO	N/M					
Knitted Blouses & shirts	Production but no Data	NO	N/M					

Table 9.4

JAMAICA

Projections of Consumption of Products Manufactured outside the Region used in the Tourist Industry								
PRODUCT	Production but no Date	UNITS	PROJECTIONS 1995 - 2000					
			CONSUMPTION					
Swimwear	Production but no Date	NO	N/M					
Underwear								
T Shirts	Production but no Date	NO	N/M					
Hats/Caps	Production but no Date	NO	N/M					
Handkerchiefs	Production but no Date	NO	N/M					
Footwear								
Plastic & Rubber & Other	Production Data Available	Pair	663,655	676,928	690,466	704,276	718,361	732,728
Leather	Production Data Available	Pair	565,221	576,526	588,056	599,817	611,814	624,050
Sawmill Products and Furniture								
Pine Board		Cub Mt	266,295	292,924	322,216	338,327	355,244	373,006
Plywood		Cub Mt	638,484	702,332	772,566	811,194	851,754	894,341
Compressed fibreboard		KG	5,023,174	5,525,492	6,078,041	6,381,943	6,701,040	7,036,092
Other wood		Cub Mt	13,400	16,080	19,297	21,226	23,349	25,684
Veneer		Cub Mt	1,873	2,061	2,267	2,380	2,499	2,624
Other Wood products		KG	419,439	461,383	507,521	532,897	559,542	587,519
Manufacture of containers other than wood								
Drinking Glasses		KG	569,683	598,168	628,076	643,778	659,872	676,369
Crystal objects		KG	21,000	21,630	22,279	22,947	23,291	23,641
Manufacturing & repair of wood furniture	Production but no Date	KG	1,514,111	1,816,933	2,180,320	2,398,352	2,638,187	2,902,005
Paper Manufacturing								
Toilet Paper	Production but no Date	KG	N/M					
Tissue and Paper Towels	Production but no Date	KG	N/M					
Paper Napkins	Production but no Date	KG	N/M					
Paper Sacks	Production but no Date	KG	N/M					
Printing								
Leaflets & Brochures	Production but no Date	KG	N/M					
Postcards	Production but no Date	KG	N/M					
Synthetic & artificial fibres								
Beach Umbrellas		NO	21,300	23,430	25,773	27,052	28,415	29,836
Regular Umbrellas		NO	61,317	62,544	63,795	65,070	66,372	67,699
Chemicals								
Paint	Production Data Available	LT	9,340,745	10,088,005	10,895,043	11,766,649	12,354,981	12,972,731
Putty	Production Data Available	KG	47,500	51,300	55,404	57,620	59,925	62,322
Soaps	Production Data Available	KG	9,752,322	9,996,130	10,096,091	10,197,052	10,299,022	10,402,012
Detergents	Production Data Available	KG	9,253,720	9,623,869	10,008,824	10,209,000	10,413,180	10,621,444
Matches	Production but no Date	100 packs	N/M					
Furniture & Wood Floor Polishes	Production but no Date	KG	N/M					
Other Polishes	Production but no Date	KG	N/M					
Disinfectants	Production but no Date	KG	N/M					
Bleaches	Production but no Date	KG	N/M					
Plastics								
Plastic Furniture	Production but no Date	KG						
Plastic Bas & Seats	Production but no Date	KG	N/M					
Crates & Boxes	Production but no Date	KG	N/M					
Cups	Production but no Date	KG	N/M					
Cups, Forks, Plates, Knives Etc.	Production but no Date	KG	N/M					
Drinking Straws	Production but no Date	KG	N/M					
Other Plastic & Kitchenware	Production but no Date	KG	N/M					
Buckets, Ashtrays, Flower Pots, Dustbins et	Production but no Date	KG	N/M					
Other Plastic Articles	Production but no Date	KG	N/M					

**PRODUCTION OF MANUFACTURED PRODUCTS
USED IN THE TOURIST INDUSTRY 1991 - 1995**

PRODUCT	Tn of lempira										
	Jamaica		Honduras			Cuba			Belize		
	Production		Value Produc.	Import	Export	Production	Imports	Exports	Production	Imports	Exports
	1994	1995	1994	1994	1995	1995	1995	1995	1995	1995	
Meat Industry			1,077,760	41,047	292,076						
Poultry Meat	40,750,000	41,970,000									
Beef	15,793,423	16,654,600				29 ^A	0	0			
Mutton, Goat & Sheep	514,342	542,167									
Fish all types	10,000,000	n/a									
Pork	7,246,527	6,688,127				14 ^A	0	0			
Meats in preserved						67 ^A	0	0			
Frozen / Chilled (lbs)									159	0	
Processed / canned (lbs)									3,420	0	
Dairy			600,811	129,378	12,473						
Milk	24,676,686	20,728,379							3,217	0	
Butter									164	0	
Cheese						3	1	0	2,332	0	
Condensed Milk	16,000,000	17,000,000							3,292	0	
Ice Cream						11	0	0			
Natural Milk Products (lbs)									268	0	
Ham	162,000	179,000									
Bacon	211,000	257,000									
Sausages, Frankfurters, Bologna	2,226,000	2,746,000									
Vinegar						8	0	0			
Coffee Beans	9,114,000	13,364,000									
Preserves of fruit and packed vegetables			246,097	47,403	28,994						
Grinding of Cereals			1,084,128	151,352	3,112						
Flour	147,123	134,121							25,400	271	
Bakery Products			369,429	50,333	1,857					845	
Other Food Preparations of Flour & Meal NES						25	1	0		1,150	
Cornmeal	14,133	13,059									
Oils and edible fats			720,841	113,822	48,581					1,729	
Edible Oils & Greases										1,244	
Soyabean Oil	4,781,000	5,370,400				14	57	0		485	
Cocoon Oil	2,049,000	2,301,600									
Edible Fats	7,279,000	6,614,000									
Rice										4,276	
Sugar			538,701	56,390	43,987						
Cane Sugar (brown)	224,412	248,558								52	
Flavoured Sugar Syrups										709	
Cocoa, Chocolate & candy			57,860	30,388	404						
Coffee, tea, cocoa, spices and manufactures thereof (lbs)										1,835	
Cocoa Beans	7,353,000	4,724,000									
Other Edible Products and Preparations			444,354	318,479	3,805						
Margarine (lbs)										791	
Homogenized Vegetables & Fruits (lbs)										1,089	
Sauces, Soups & Others (lbs)										1,965	
Prepared Products (lbs)										391	
Infant Products (lbs)										2,597	
Malt Extract & Preparation (lbs)										340	
Beverages			378,800	31,792	785						
Rum	21,074	20,378								44	
Beverages No Alcoholic Industry			572,908	20,697	0					66	

Table 10.1

**PRODUCTION OF MANUFACTURED PRODUCTS
USED IN THE TOURIST INDUSTRY 1991 - 1995**

PRODUCT	Th of Iempire										
	Jamaica		Honduras			Cuba			Belice		
	Production		Value Produc.	Import	Export	Production	Imports	Exports	Production	Imports	Exports
	1994	1995		1994		1995		1995			
Other Alcoholic Beverages	1,326	947									
Beer & Stout & Malt Beverages	75,988	66,159						1,086	513	0	
Aerated Waters	55,728	48,888							353	0	
Non-Aerated (non-alcoholic) (gals)									159	0	
Wines (gals)									271	0	
Whiskies (gals)									618	0	
Gin, Vodka, Brandy & Other Spirituous Drinks									352	0	
Tobacco			183,316	2,443	102,120						
Cigars (Import & Export data in KG)	11,456	16,588									
Cigarettes (Import & Export data in KG)	1,273,189	1,212,555						94	131	0	
Textiles of soft fibres excl. Knits			197,261	209,274	23,027						
Yarns, Fibers (lbs)									1,540	0	
Wovens (sq. Yds.)									2,070	0	
Lace (yds)									6	0	
Sacks & Bags of Material (doz)									459	0	
Clothing (doz)									9,741	14,553	
Socks, Stocking, Gloves, Mitts (doz. Pr.)									287	0	
Hats and other Headgear (No)									87	0	
Accessories (belts) (lbs)									108	0	
Fiber of rayon						0	0				
Cotton	492,000	231,500	992	47,784	2,472						
Poly /Cotton	492,000	231,500									
Carpets				0	3,642	0					
Knitted Textiles			44,833	11,891	24,850						
Terry (includes fabric and finished towels etc)			966,116	332,348	58,315					0	
Leather Manufacturing			97,481	16,736	1,336						
Industry of the leather Footwear			68,322	14,049	1,915						
Dress, Sport, Sandals (pairs)									1,037	0	
Other parts of Footwear (lbs)									1	0	
Plastic & Rubber & Other	n/a	n/a									
Leather	n/a	n/a									
Paper Manufacturing			694,619	9,878	116,094						
Cork and wood Manufactures, Excluding Furniture			105,497	5,970	49,754						
Cork (lbs)									8	0	
Playwood, Veneer Sheets (Cu. Ft)									1,087	238	
Other Wood (lbs)									760	8	
Building Supply / Households (lbs)									170	77	
Furniture & Parts Thereof			210,548	19,288	112,429						
Household									491	30	
Schools / Churches / Offices (cwt)									625	0	
Other (cwt)									1,167	71	
Leaflets & Brochures			554,347	553,568	32,402						
Pulp of paper or paperboard									7,088	0	
Printed an editorial			259,882	57,984	25,755						
Chemicals											
Paint	8,391,000	7,717,000	0	372,165	0	9,844	N.A.	0	2	0	
Putty	20,000	12,000									
Other substances and chemical products			343,892	665,826	21,156						
Soaps	3,613,000	877,000							1,790	2	

Table 10.2

**PRODUCTION OF MANUFACTURED PRODUCTS
USED IN THE TOURIST INDUSTRY 1991 - 1995**

PRODUCT	Tn of lempiras										
	Jamaica		Honduras			Cuba			Belice		
	Production		Value Produc.	Import	Export	Production	Imports	Exports	Production	Imports	Exports
	1994	1995		1994		1995			1995		
Perfumes (liq. Oz.)									174	0	
Cosmetics (lbs)									1,383	30	
Coating Products (lbs)									2,774	0	
Ink (lbs)									92	0	
Detergents	5,465,000	2,444,000									
Matches									8	113	
Plastics			408,114	156,706	18,328						
Pipes, tubes, Adhesive Pipes Hoses (lbs)									3,579	0	
Households (Kitchen & bathroom) (lbs)									2,779	0	
Builders Wares (lbs)									340	0	
Office Schools, Lab, Others (lbs)									615	0	
Pottery and ceramic			7,649	142,979	3,442	110	0	4			
Ceramics (plumbing) (No)									263	0	
Ceramic Tiles (lbs)									88	0	
Glazed / Unglazed Tiles & Mosaic Cubes									996	0	
Mosaic cubes						390		0	N.A.		

/1 Year 1994

Table 10.3

**APPARENT NATIONAL CONSUMPTION OF PRODUCTS USED
IN THE TOURIST INDUSTRY 1991 - 1994**

PRODUCT	Jamaica	Honduras	Cuba
	1994	Th of lampiras 1994	1988
Meat Industry			
Poultry Meat	77,513,259		
Beef	21,613,970	828,731	
Mutton: Goat & Sheep	3,103,848		
Fish all types	15,535,462		
Pork	8,480,059		
Shrimp, Lobster, Conch, Crab etc.	-1,998,772		
Dairy			
Milk	24,665,730	727,718	
Cream	128,199		
Yoghurt	18,381		
Butter	726,758		
Cheese	2,390,748		
Condensed Milk	15,640,904		
Ice Cream	1,570		
Canned & Preserved Foods			
Ham	197,828		
Bacon	211,011		
Sausages, Frankfurters, Bologna	2,549,729		
Salted fish in brine	2,283,754		
Processed Corn	64,415		
Processed Beans	89,971		
Other Processed Vegetables	-240,639		
Guava Jams & Jellies	-65,655		
Other Jams & jellies	50,075		
Preserved or Prepared Groundnuts	68,866		
Other Nuts Preserved	42,930		
Peanut Butter	87,318		
Preserved Mangoes	-96,911		
Preserved pineapples	26,967		
Preserved Citrus fruits	-4,898		
Other Preserved Fruits	-713,051		
Preserves of fruit and packed vegetables		284,508	
Orange Juice not Concentrated	113,754		
Grapefruit Juice not Concentrated	-44,053		
Lime Juice not Concentrated	19,673		
Other Citrus Juices	-228,335		
Pineapple Juice not Concentrated	-14,249		
Tomato Juice	22,467		
Grape Juice not Concentrated	60,587		
Apple Juice not Concentrated	192,574		
Passion Juice	1,125		
Mixed Juices	-424,132		
Soya Sauce	6,281		
Tomato Ketchup	-318,510		
Other Tomato Sauces	26,614		
Vinegar	19,685		
Pepper Sauces	-441,022		
Mayonnaise	147,129		
Other Sauces	-215,128		
Dried Soups	202,905		
Preparations of Malt	1,000,067		
Flavoured Powders for Making Beverages	855,730		
Other Food Preparations NES	208,615		
Coffee Beans	-799,384		
Instant coffee	20,034		
Tea	144,869		
Salt	7,816,017		
Grinding of Cereals			
Flour	148,232		
Cereal & Cereal Preparations		1,230,368	
Bakery Products			
Biscuits Un sweetened	-500,086		
Biscuits Sweetened	89,453		
Ice Cream Cones	14,184		
Mixes & Doughs	114,876		
Pasta	271,481		
Other Bakers Wares	-456,258		
Yeasts	214,415		
Baking Powders	2,593		

**APPARENT NATIONAL CONSUMPTION OF PRODUCTS USED
IN THE TOURIST INDUSTRY 1991 - 1994**

PRODUCT	Imports	Exports	Cuba 1986
	1994	Th of Imports 1994	
Other Food Preparations of Flour & Meal NES	155,776	417,805	
Corn Processing			
Cornmeal	18,286		
Edible Oils & Greases			
Soybean Oil	10,420,590		
Coconut Oil	1,407,033		
Edible Fats	13,133,419	786,062	
Cereals			
Rice	68,548		
Other Cereals	870,452		
Sugar			
Cane Sugar (brown)	98,318	551,104	
Cane Sugar (refined)	15424,911		
Flavored Sugar Syrups	-272,304		
Cocoa, Chocolate & candy			
Chewing Gum	110,972		
Other sugar confectionery not containing cocoa	810,324		
Confectionery	88,036		
Cocoa Powder un sweetened	88,204		
Cocoa Powder sweetened	9,482		
Other Cocoa Preparations	195,130		
Cocoa Beans	4,811,008		
Coffee, Tea, Cocoa, Spices & Manufactures Thereof		67,844	
Other Edible Products and Preparations		759,028	
Beverages			
Rum	7,843		
Other Alcoholic Beverages	1,922	409,807	
Beer & Stout & Malt Beverages	75,187		
Aerated Waters	70,509		
Mineral Water	347,193		
Beverages No Alcoholic Industry		583,605	
Tobacco			
Cigars (Import & Export data in KG)	-119,658		
Cigarettes (Import & Export data in KG)	1,268,987	83,639	
Textiles of hard fibres			
Table Linen	130,967		
Drapes	7,014		
Textiles of soft fibres excl. Knits			
Cotton	15,512,695		
Poly/Cotton	22,828,659		
Bed Linens	163,068		
Bedspreads	6,017		
Textile Yarn, Fabric & Clothing		383,508	
Articles except textile pledges		46,304	
Carpets	339,287	3,642	
Prints fabrics		31,874	
Pledges of getting dressed		1,239,949	
Knitted Textiles			
Terry (includes fabric and finished towels etc.)	393,736		
Leather Manufacturing			
Articles of Leather excluding Shoes	7,757		
Articles of Leather & Leather Industry		112,681	
Garment Manufacturing			
Male			
Suits & Jackets	-140,504		
Trousers & Shorts	-477,163		
Shirts	-922,742		
Knitted trousers & shorts	-324,444		
Knitted Shirts	-164,397		
Sweatwear	6,793		
Females			
Suits & Jackets	2,916		
Trousers & Shorts	-404,482		
Dresses	-219,433		
Skirts	-3,565		
Shirts & blouses	-139,882		
Knitted Skirts	-7,987		
Knitted trousers & shorts	-341,835		
Knitted Blouses & shirts	-354,195		
Sweatwear	10,878		

**APPARENT NATIONAL CONSUMPTION OF PRODUCTS USED
IN THE TOURIST INDUSTRY 1991 - 1994**

PRODUCT	Jamaica	Honduras	Cuba
	1994	Tn of lampiras 1994	1995
Unisex			
T Shirts	45,434,763		
Hats/Caps	259,293		
Handkerchiefs	70,599		
Plastic & Rubber & Other	632,052		
Leather	538,306	80,458	
Sawmill Products excl. Furniture			
Manufacture of containers other than wood			
Manufacturing & repair of wood furniture	1,261,759		
Sawmills and carpenteries		588,403	
Cork on wood Manufactures, Excluding Furniture		81,113	
Furniture & Parts Thereof		117,407	
Paper Manufacturing			
Paper, Paperboard and articles of paper		1,075,513	
Toilet Paper	1,679,331		
Tissue and Paper Towels	438,886		
Paper Napkins	95,603		
Paper Socks	160,758		
Printing			
Leaflets & Brochures	1,543,999	282,111	
Postcards	532		
Synthetic & artificial fibres			
Chemicals		372,185	
Paint	8,648,838		4498.4
Putty	97,325		
Scaps	9,514,460		
Detergents	8,897,808		
Matches	-65,835		
Furniture & Wood Floor Polishes	69,255		
Other Polishes	48,508	888,562	
Disinfectants	65,600		
Bleaches	377,684		
Plastics			
Plastic Furniture	74,131	546,492	
Plastic Bas & Seats	737,651		
Crates & Boxes	91,361		
Cups	43,779		
Cups, Forks Plates, Knives Etc.	-101,411		
Drinking Straws	-5,643		
Other Plastic & Kitchenware	25,633		
Buckets, Ashtrays, Flower Pots, Dustbins etc.	151,473		
Other Plastic Articles	379,018		
Pottery and ceramic		147,188	