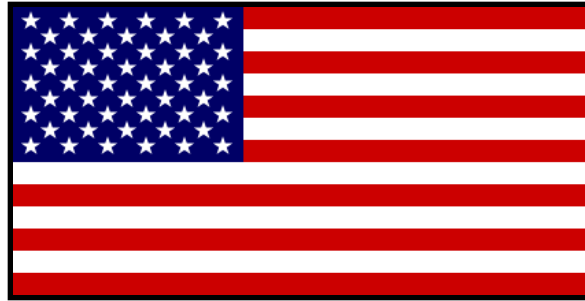
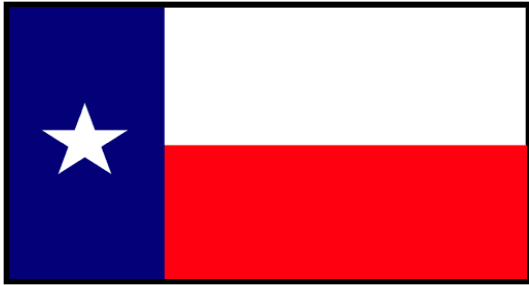


# U.S. Agricultural Export Prospects for Cuba



**Parr Rosson, Director**  
**Center for North American Studies**  
**Department of Agricultural Economics**  
**Texas A&M University System**



# Background

- *Prior to Embargo, U.S. Owners Held 25% of All Arable Land in Cuba (2/7/1962)*

*Sugar, Citrus, Vegetables, Cattle*

- Trade Sanctions Reform & Export Enhancement Act, 2000, Allows US Exports

Top 25 Market for US Agriculture & Forestry

- Govt Agency, *Alimport*, Buys All Food
- Top Cuban Exports: Sugar, Nickel, Tobacco, Fish, Citrus
- Top Cuban Imports: Petroleum, Food, Machinery, Chemicals

# Market Prospects

- 2004-2006 Strong Economic Growth (5.4% - 7.5%)
  - Spurred by Tourism, Higher Sugar, Citrus & Nickel Prices
- Cuba is Far From Self-Sufficient in Food, But Lacks Strong, Consistent Purchasing Power
- Debt Overhang: \$15.4 Billion, 40% of GDP  
2005 Cuban Food Imports Reached \$750 Million
- \$336 Million from United States, 42% Market Share
- Politics Dominate

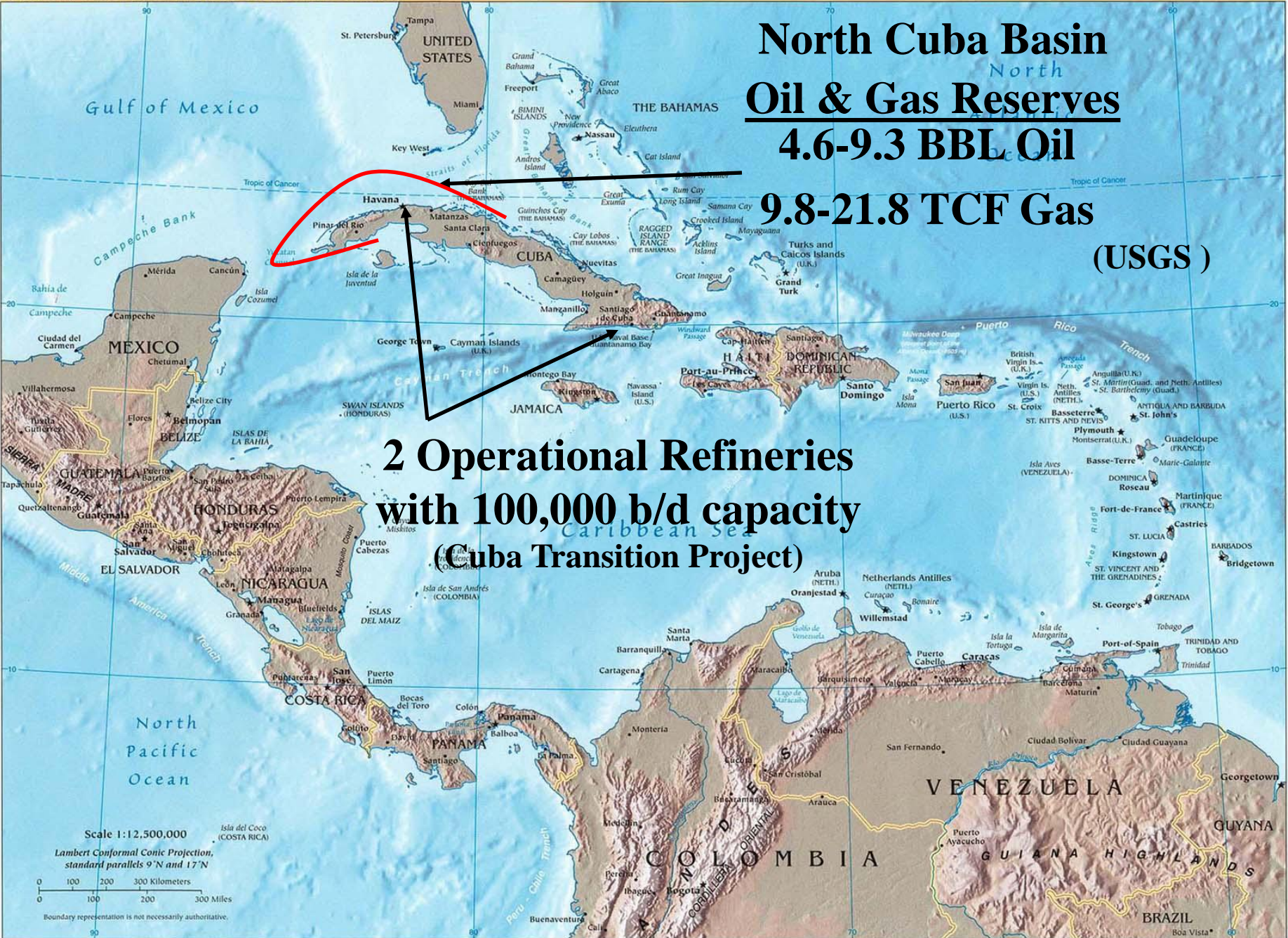
# North Cuba Basin Oil & Gas Reserves

4.6-9.3 BBL Oil

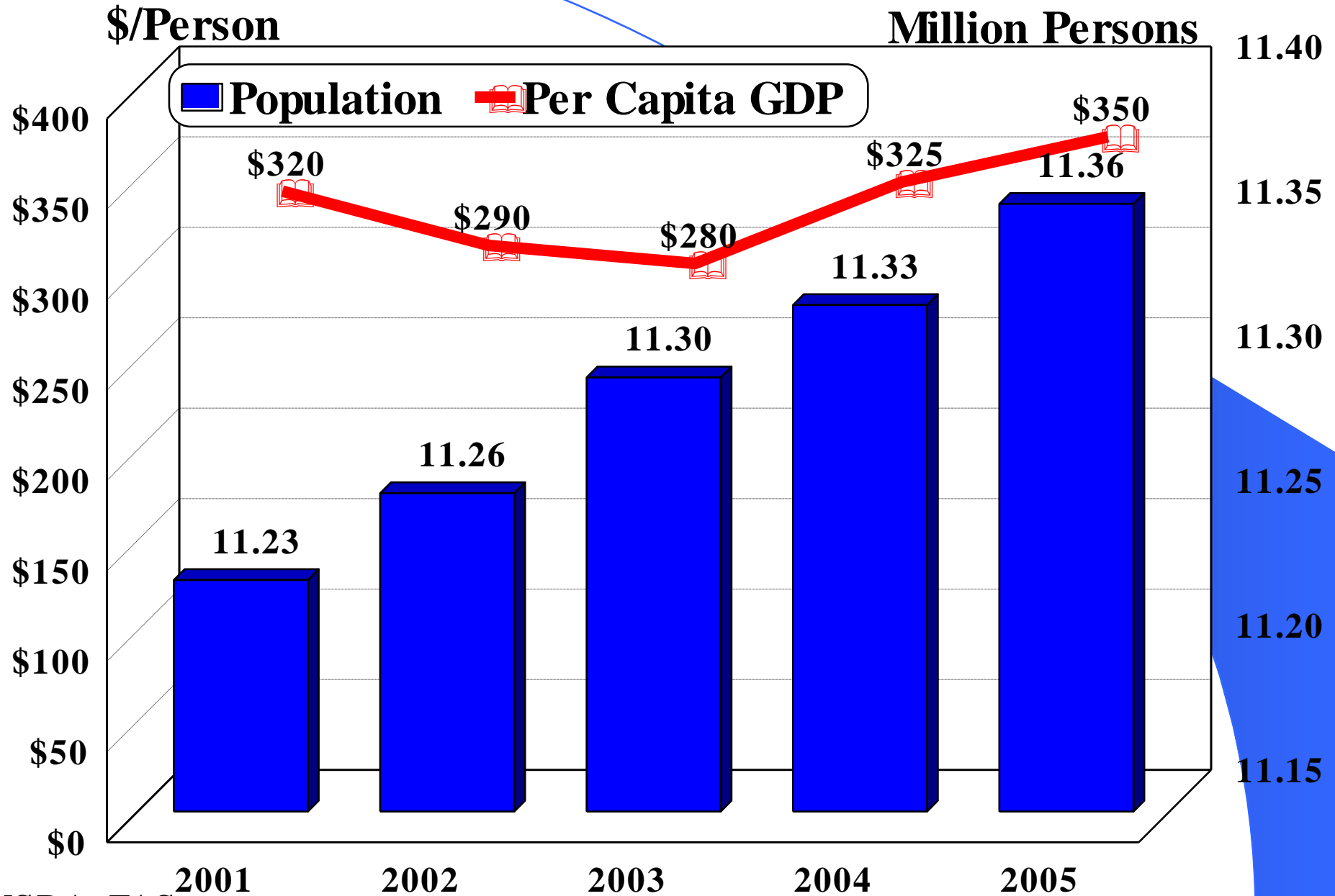
9.8-21.8 TCF Gas

(USGS)

## 2 Operational Refineries with 100,000 b/d capacity (Cuba Transition Project)



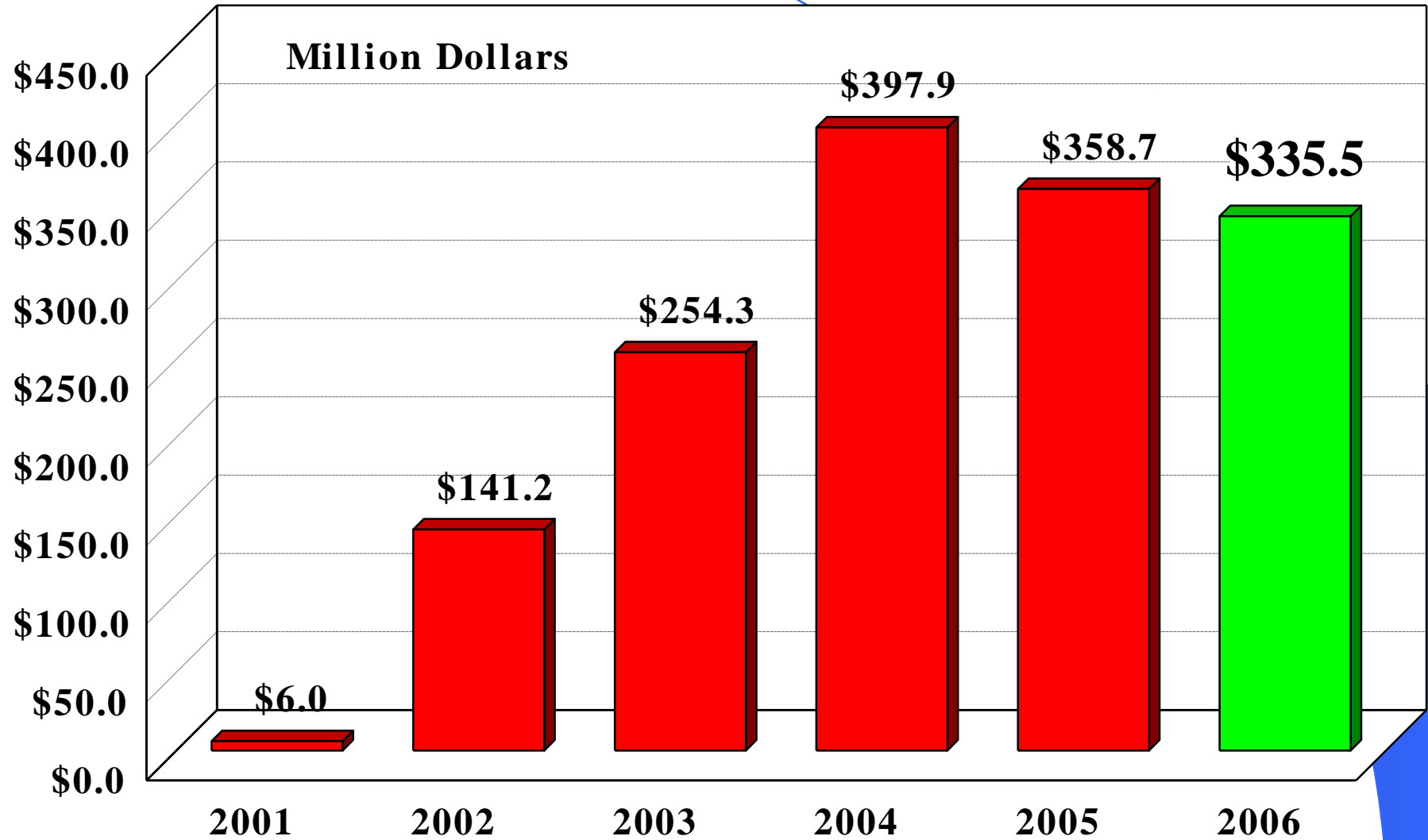
# Cuba: Population & Income Growth



# Tourism in Cuba

- Cuba Number Two Caribbean Tourist Destination-Creates Food Demand  
Economic Contribution is 12% of GDP
- About 1 Million U.S. Tourists Projected If Travel Restrictions Are Lifted
- Additional U.S. Food Exports of \$200 Million Annually Required to Support U.S. Tourism when/if Travel Restrictions Lifted

# U.S. Agricultural and Related Products Exports to Cuba, 2001 - 2006



Source: U.S. Trade Internet System, [www.fas.usda.gov/ustrade](http://www.fas.usda.gov/ustrade)



14 1:28 PM





15 11:30 AM



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## Valores nutritivos de los vegetales. ( Vitaminas )

Cada 100 g comestible

Vegetales	A(mcg)	B1(mcg)	B2(mg)	Niacina(mg)	C(mg)
ACELGA	875	.03	.09	0.4	34
AJO	5	.21	.08	0.6	9
APIO	10	.02	.04	0.4	8
BERENJENA	-	.04	.04	0.8	5
BERRO	1105	.12	0.1	1	44
BERZA	2015	.16	.24	1.2	125
BRECOL	560	.12	.18	1.1	94
CEBOLLA	5	.04	.03	0.3	10
COL	30	.06	.04	0.3	43
COLIFLOR	10	.09	.11	0.7	82
CHAYOTE	5	.03	.04	0.4	20
ESPARRAGO	285	.12	.10	0.5	8
ESPINACA	1170	.06	.17	0.6	46
HABICHUELA	0.4	.06	-	0.7	19
LECHUGA	260	.08	.08	0.4	12
PEPINO	5	.03	.04	0.2	14
PEREJIL	1820	.12	.24	1	146
PIMIENTO	380	0.7	0.6	1.3	181
RABANO	-	.03	.03	.03	28
REMOLACHA	-	-	.04	0.2	5
TOMATE	180	.06	.05	.07	23
ZANAHORIA	3530	.06	.04	.06	5

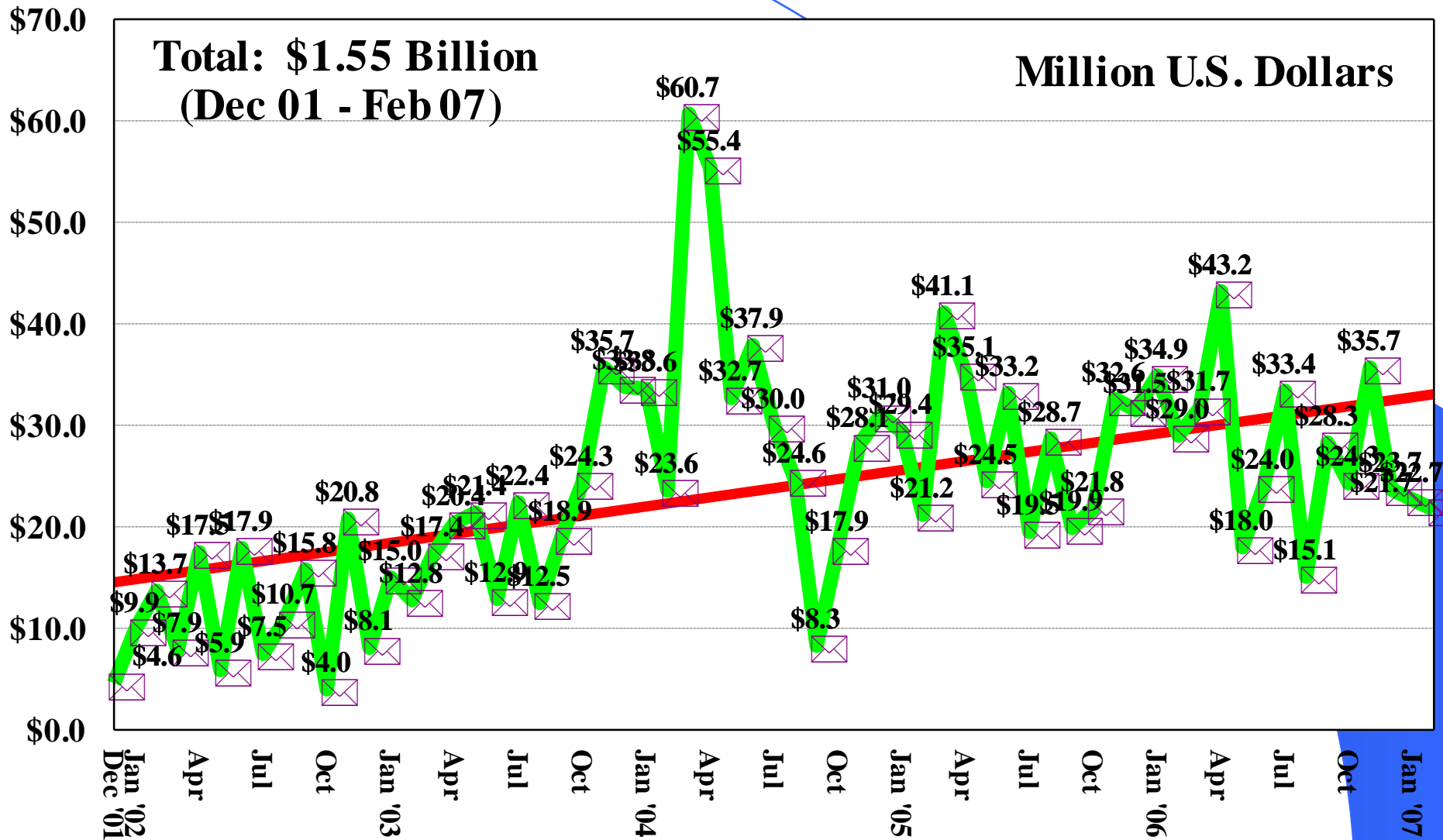
MEDICINAL DE LAS FRUTAS

El consumo de frutas y verduras es esencial para la salud humana, ya que proporcionan una gran variedad de nutrientes, vitaminas y minerales necesarios para el funcionamiento normal del organismo. Estas plantas también contienen compuestos bioactivos que ayudan a prevenir enfermedades crónicas como el cáncer, el corazón y la diabetes. Se recomienda consumir al menos 5 porciones de frutas y verduras al día para obtener los beneficios más completos.

**MANEJO (MANEJO) DE LA...**  
 Este cartel proporciona información sobre el manejo de las plantas en el jardín, incluyendo instrucciones sobre cómo cuidarlas y qué hacer si aparecen plagas o enfermedades. Menciona la importancia de mantener las plantas saludables para obtener el máximo beneficio de sus nutrientes.

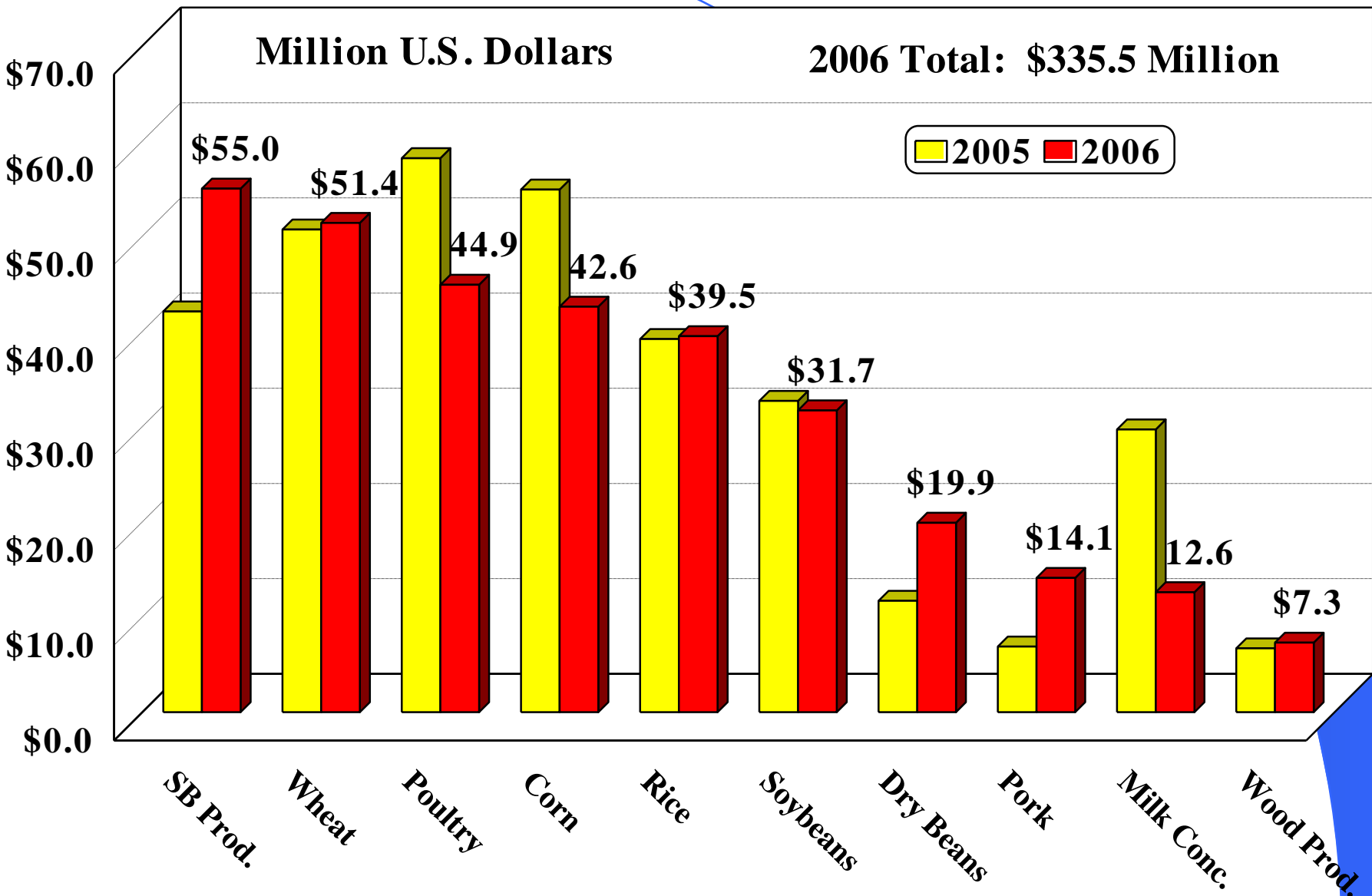


# U.S. Monthly Exports of Agricultural and Related Products to Cuba



Source: U.S. Trade Internet System, [www.fas.usda.gov/ustrade](http://www.fas.usda.gov/ustrade)

# U.S. Ag and Related Exports to Cuba, 2005 & 2006

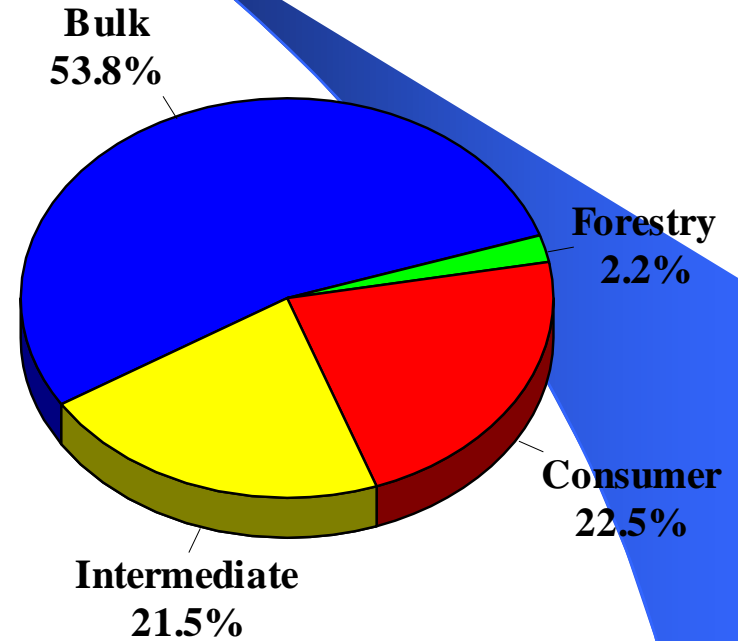
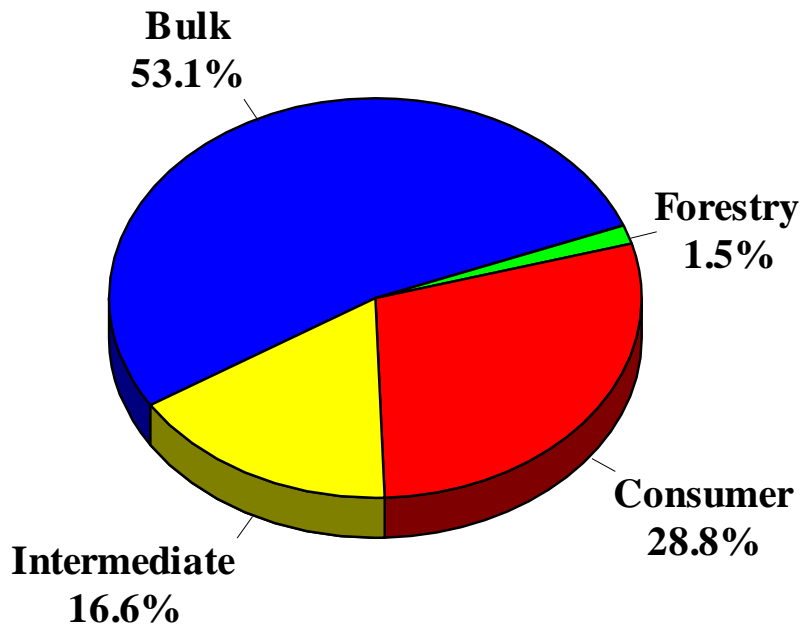


Source: Foreign Agricultural Service, USDA

# Composition of U.S. Agricultural and Forestry Exports to Cuba, 2005 & 2006

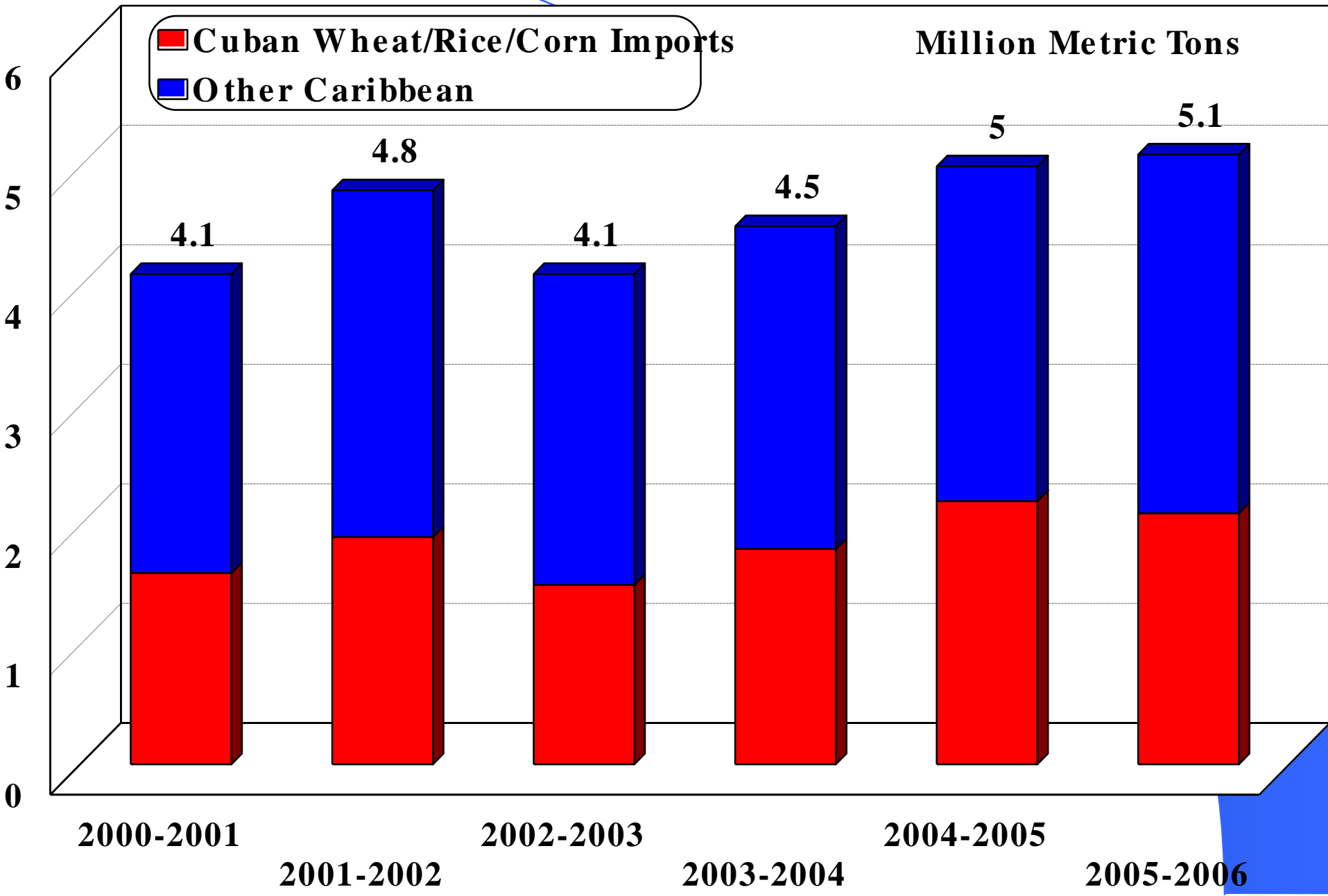
2005 Total: \$358.7 Million

2006 Total: \$335.5 Million



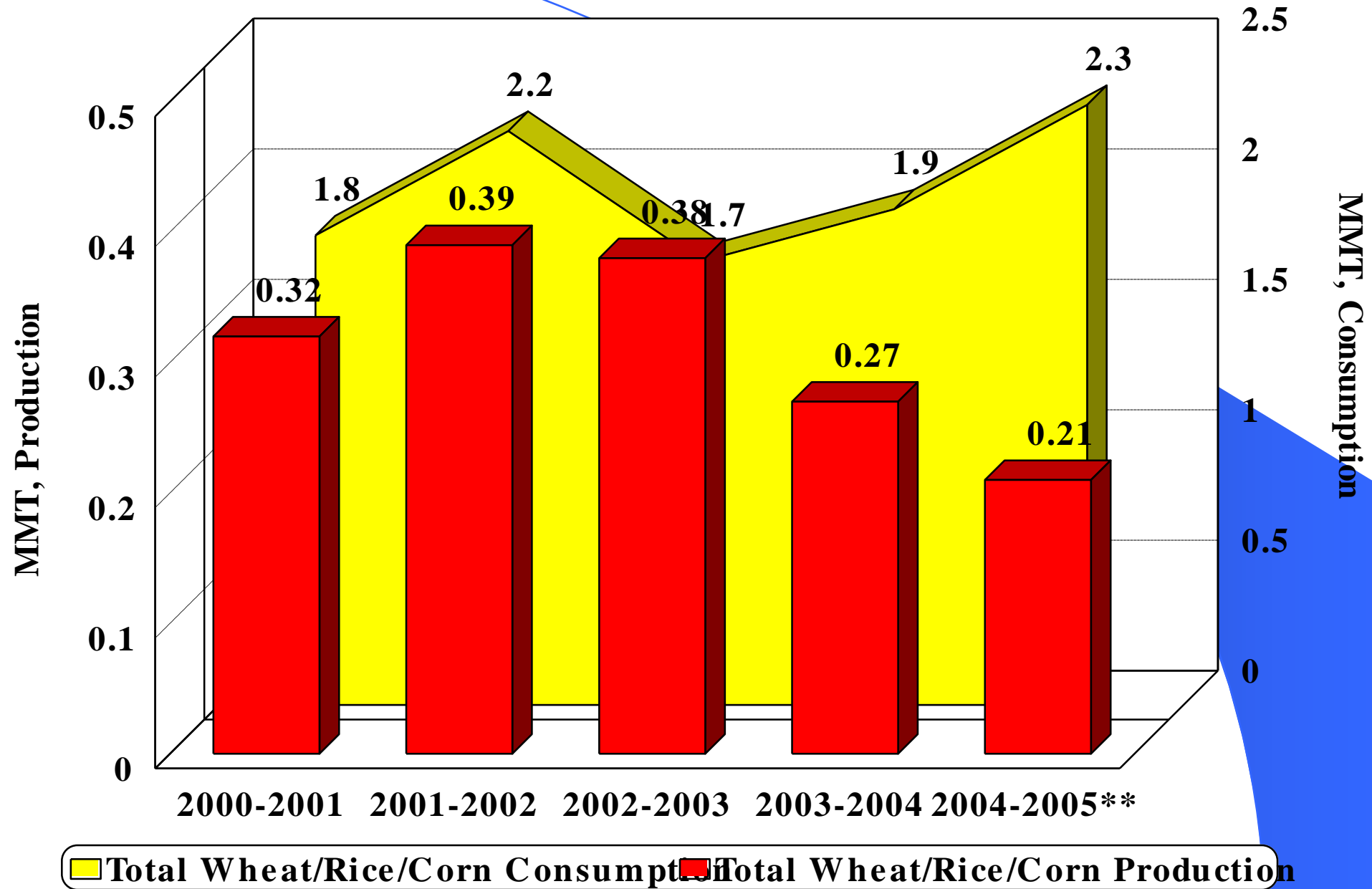
Source: U.S. Trade Internet System, [www.fas.usda.gov/ustrade](http://www.fas.usda.gov/ustrade)

# Cuban Share of Caribbean Grain Imports



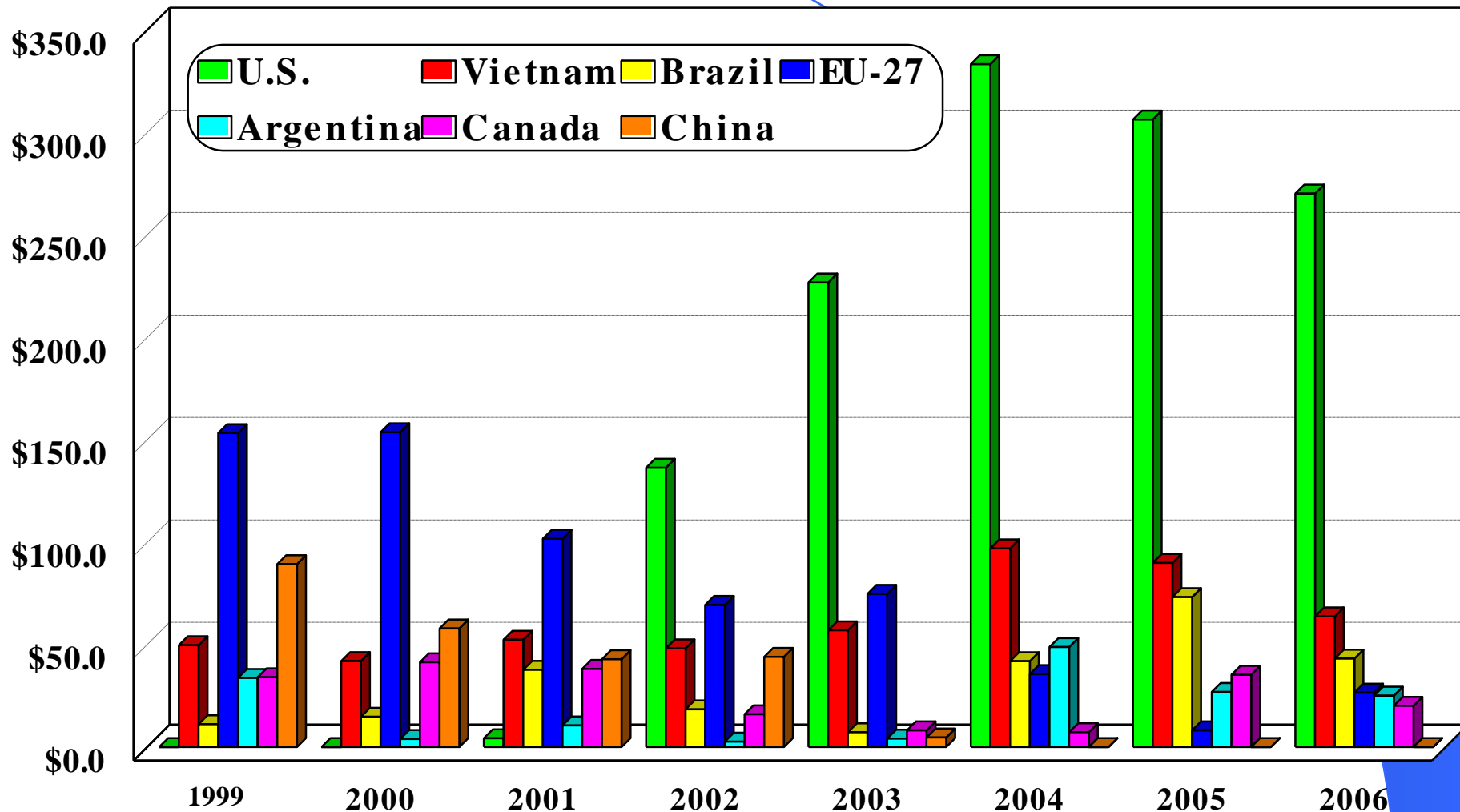


# Cuba's Grain Shortfall



# Exports of Selected Agricultural Products to Cuba, Selected Countries

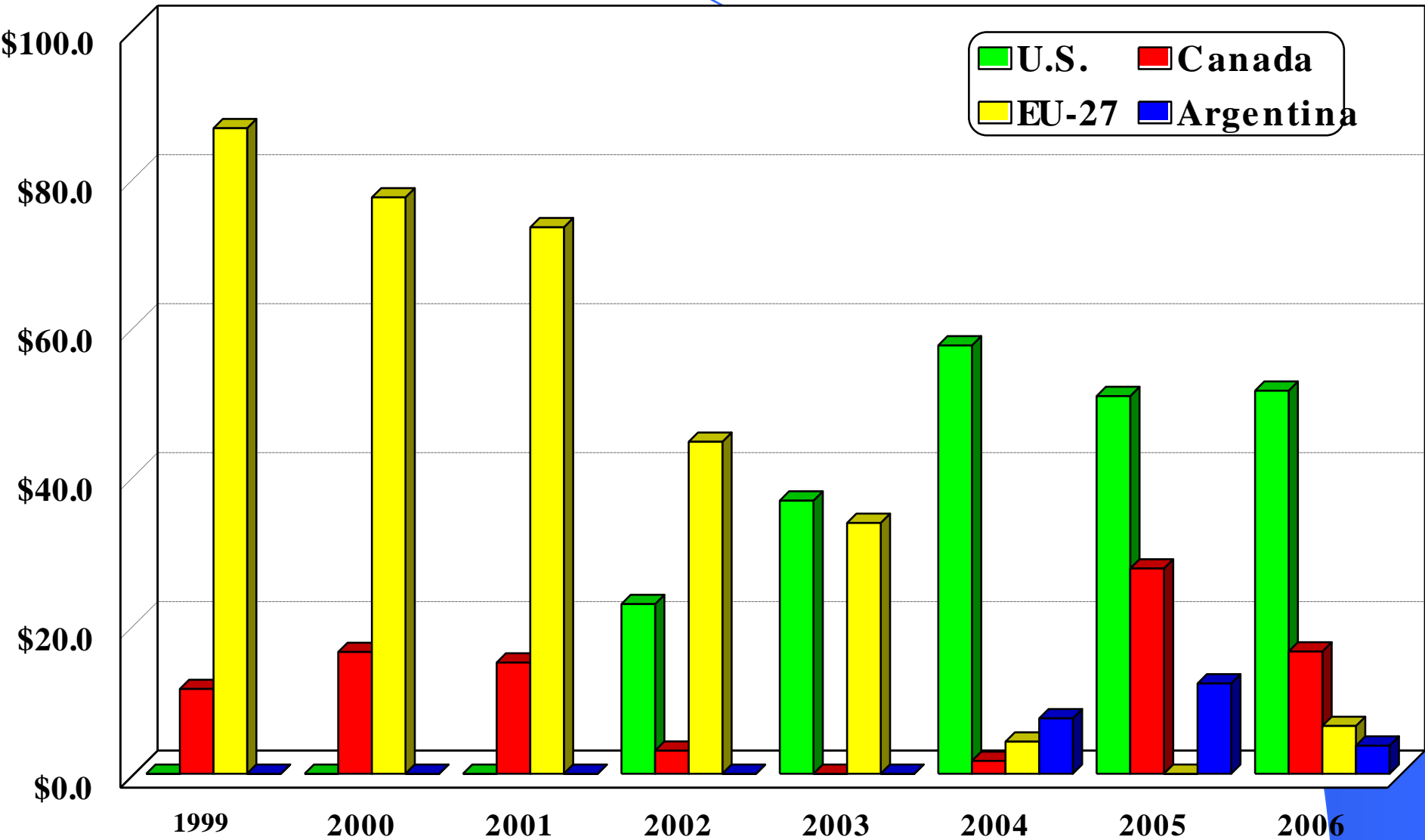
Million Dollars



Source: Respective Government Sources and FAO-STAT; Vietnam and China values represent rice only; Vietnam data are estimated for 2005 & 2006 from volumes, Vietnamese prices, and exchange rates

# Exports of Wheat to Cuba, Selected Countries

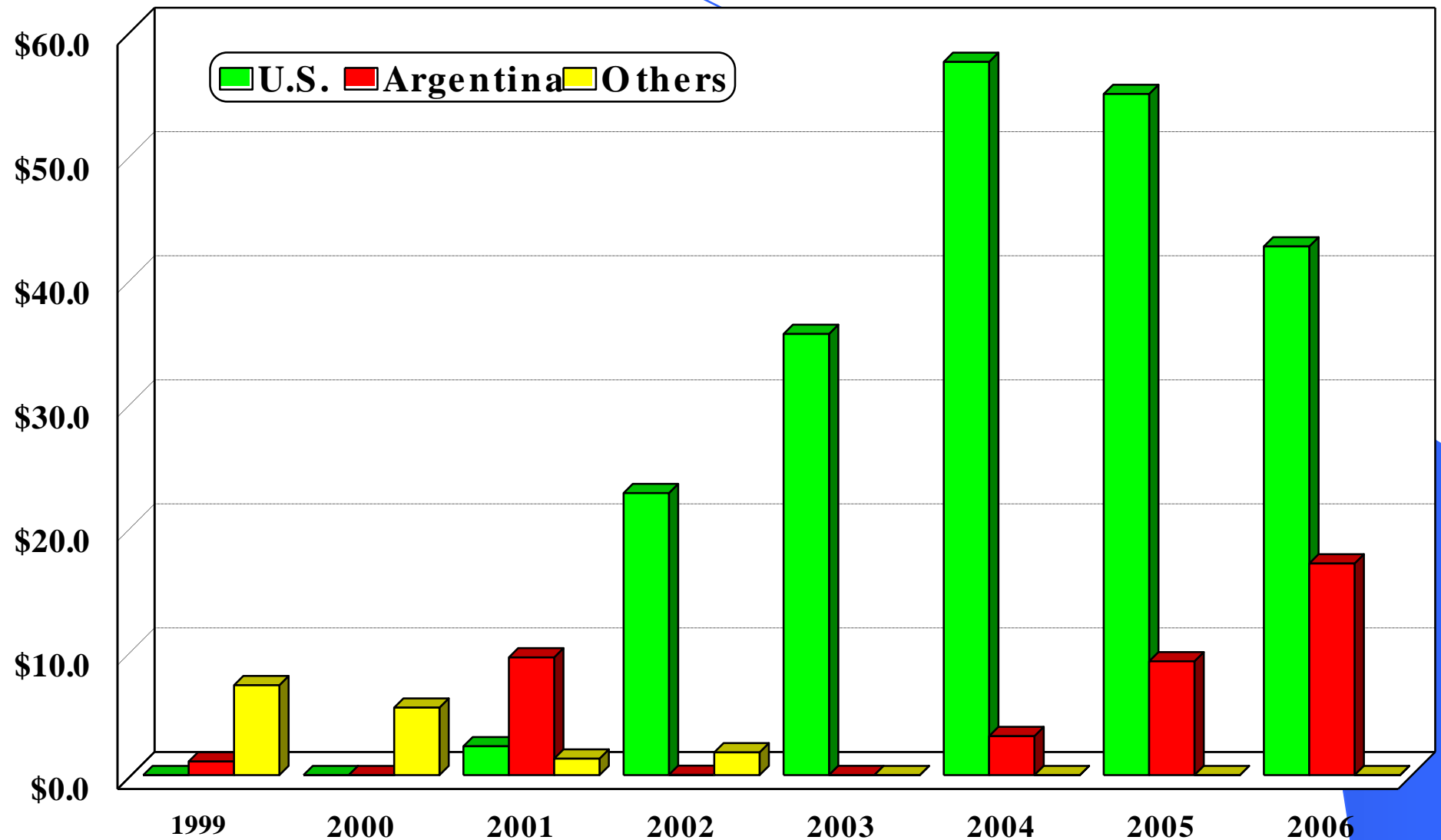
Million Dollars



Source: Respective Government Sources

# Exports of Corn to Cuba, Selected Countries

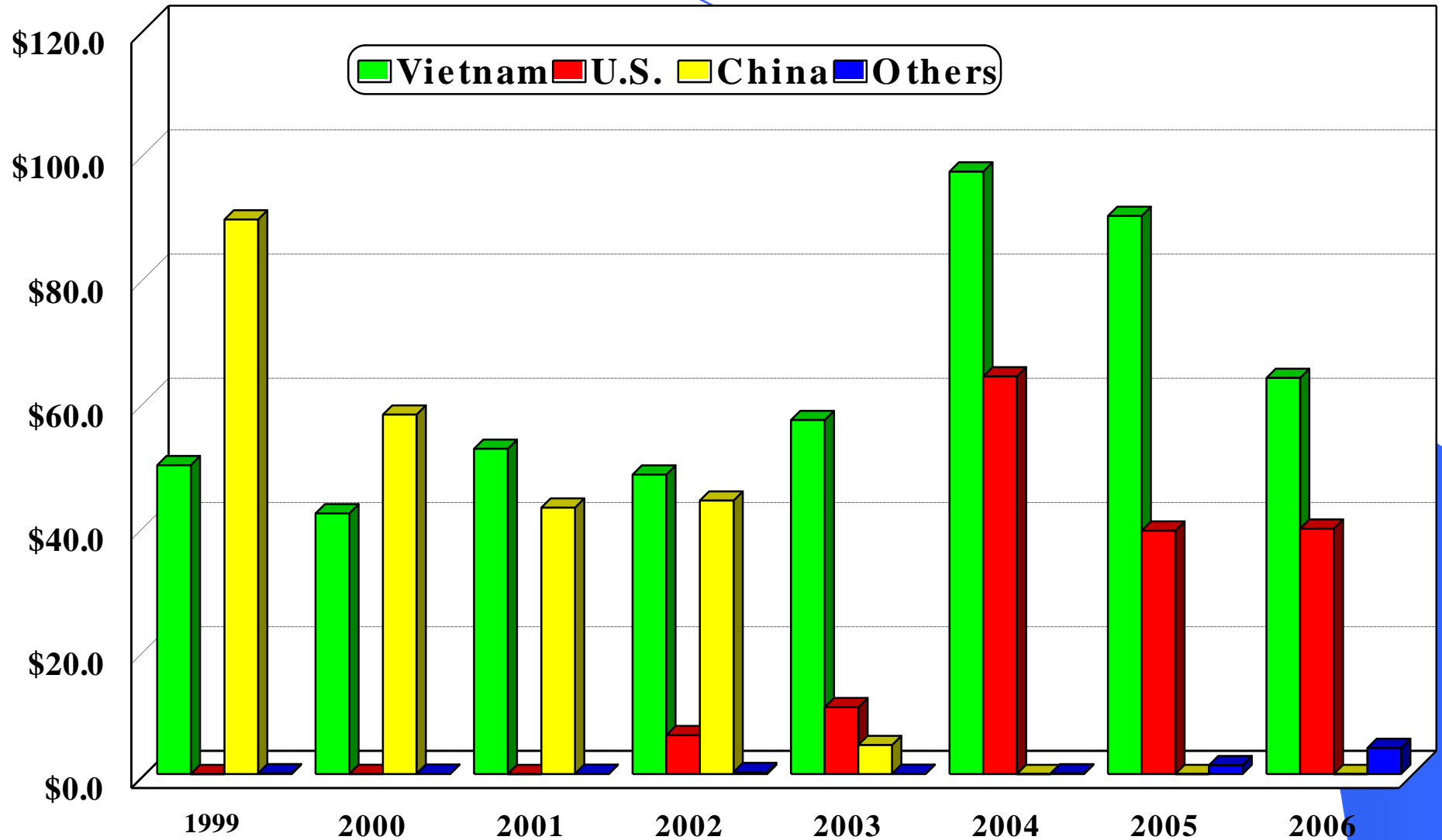
Million Dollars



Source: Respective Government Sources

# Exports of Rice to Cuba, Selected Countries

Million Dollars

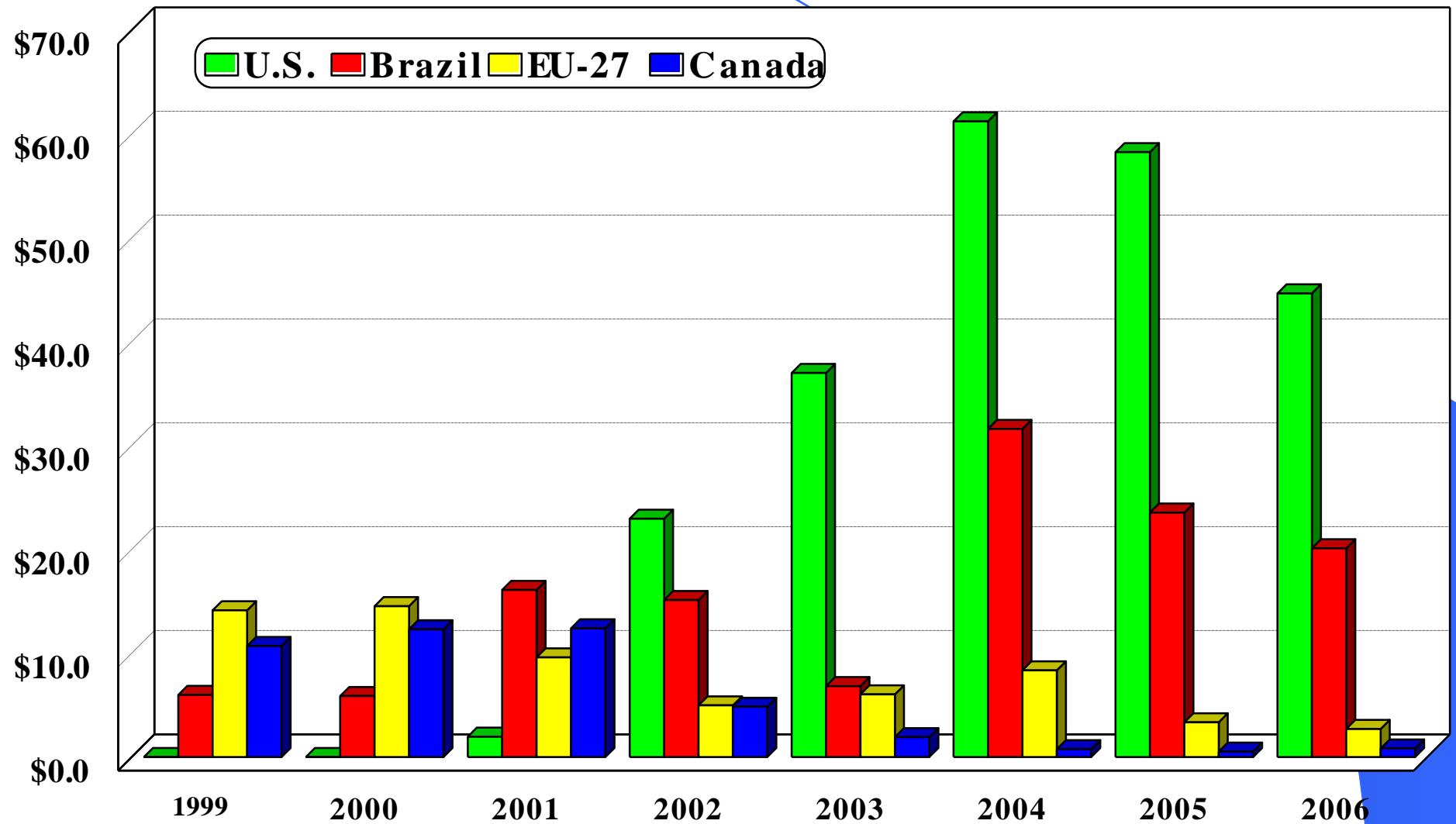


Source: Respective Government Sources and FAO-STAT;

Vietnam values estimate for 2005 & 2006 from volumes, Vietnamese prices, and exchange rates

# Exports of Poultry Meat to Cuba Selected Countries

Million Dollars



Source: Respective Government Sources

# Summary

- U.S. Market Position Strong, but Future Prospects Clouded by High Prices & Competition
- Tourism Key to Market Growth in Near Term, Along with Sugar, & Nickel Exports
- Cuba the Top Carib Grain Market
- Latent Demand for Meats, Especially Pork & Beef, Most Consumer Products Currently for Tourists
- Optimism About Recent Oil/Gas Discovery

# Thanks!



<http://cnas.tamu.edu>

***International Trade and Market Analysis***

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