

# The Evolving Role of the United States as a Major Food Supplier to Cuba

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**And**

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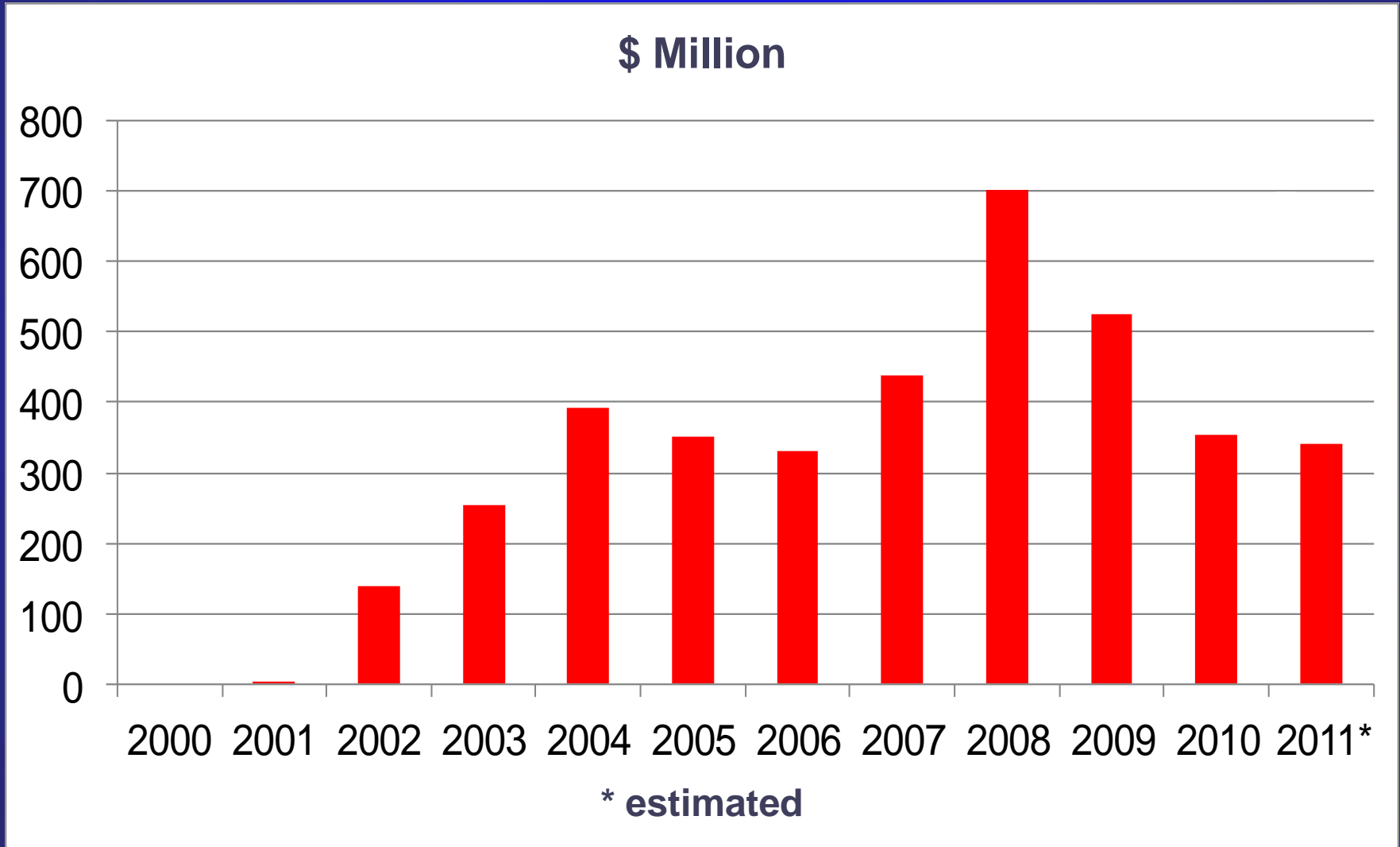


**February 7, 2012**



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# U.S. Exports of TSRA-eligible Food and Agricultural Products to Cuba, 2000-11



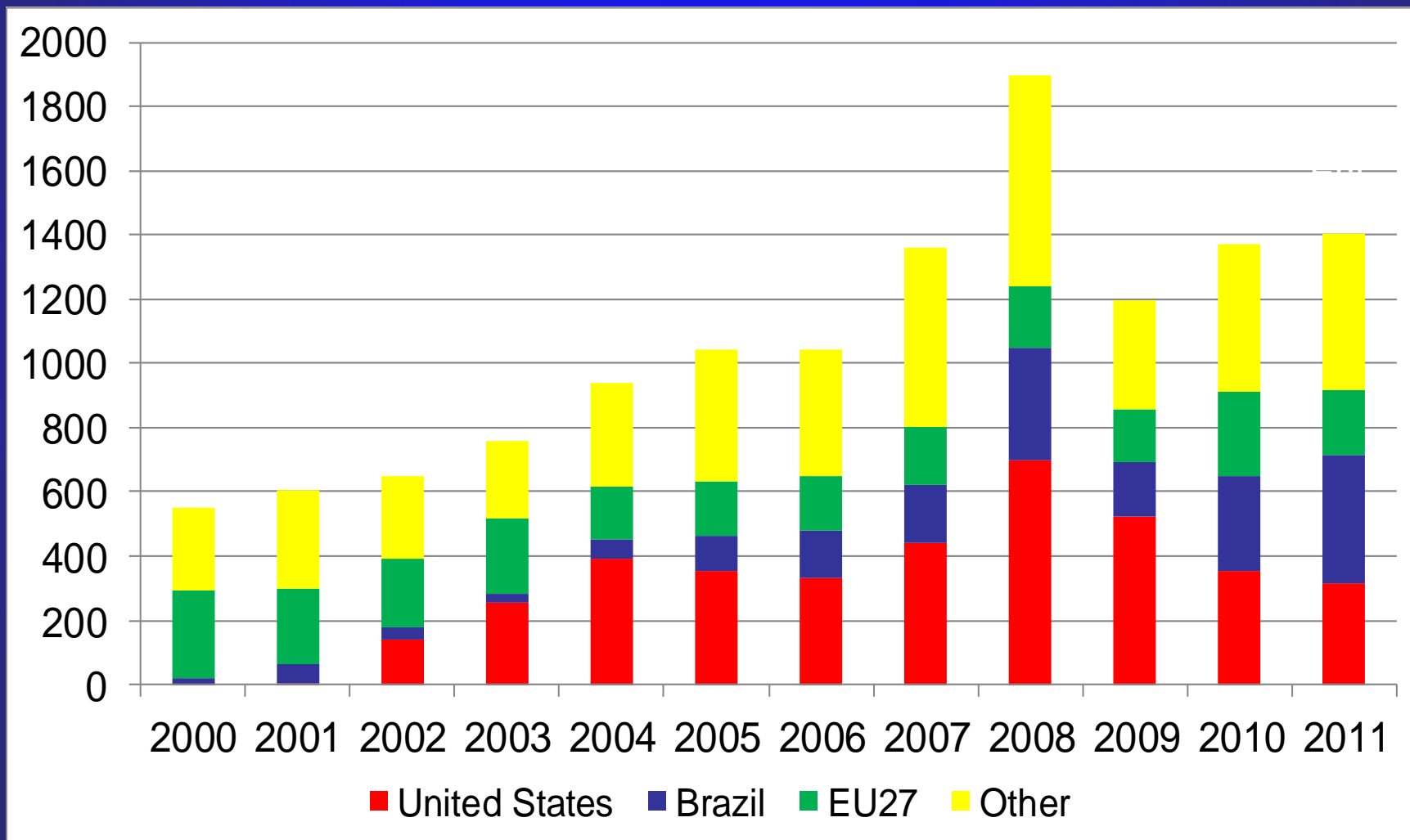
Source: U.S. Department of Commerce

# Issues to be Considered in this Presentation:

- 1. What is driving these changes?**
  - U.S. and Cuban political developments?
  - Changes in Cuban domestic agricultural production levels?
  - Cuban purchases from other countries?
- 2. Examine how actions of other trading partners have impacted U.S. exports**
- 3. Briefly discuss prospects for the future.**

# Cuban Imports of TSRA-eligible Food and Agricultural Products by Country, 2000-11

\$ million



Source: GTIS

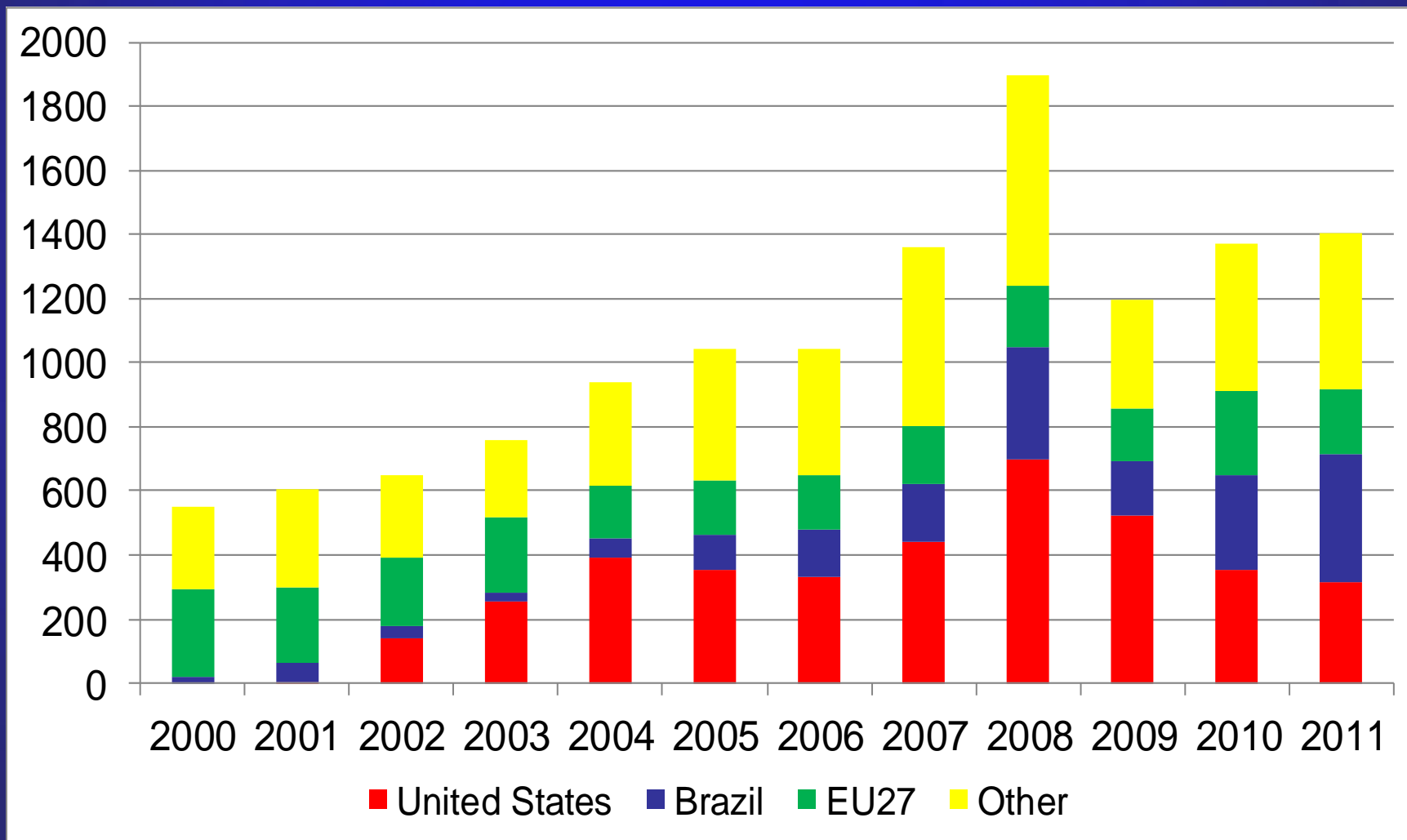
# 2008 was the Most Destructive Hurricane Season in Cuba's Recorded History



**T.S. Fay: 8/16 – 8/18**  
**H. Gustav: 8/30 - 9/1**  
**H. Hanna: 9/2 – 9/3**  
**H. Ike: 9/8 – 9/9**  
**T.S. Paloma: 11/8 – 11/9**

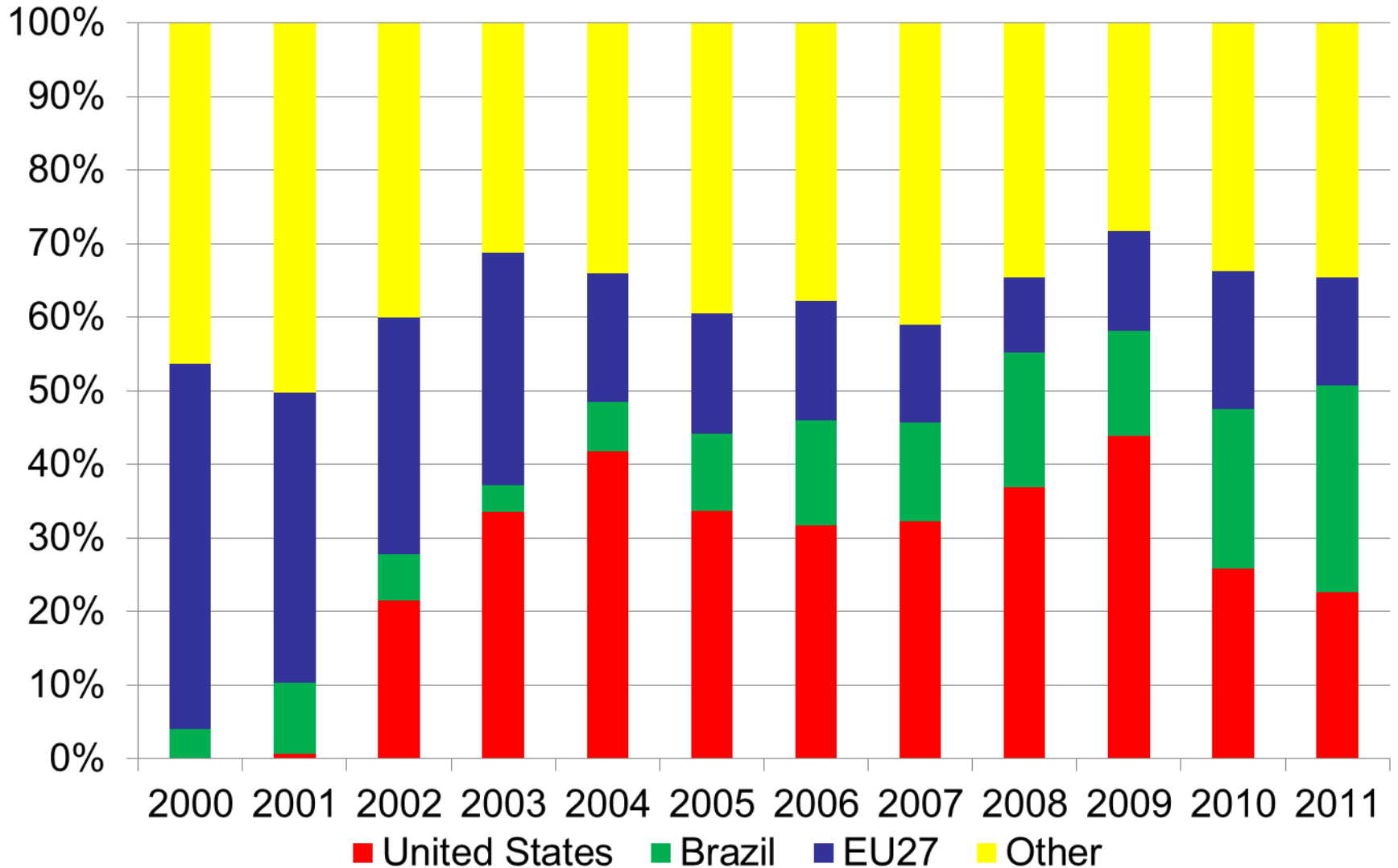
# Cuban Imports of TSRA-eligible Food and Agricultural Products by Country, 2000-11

\$ million



Source: GTIS

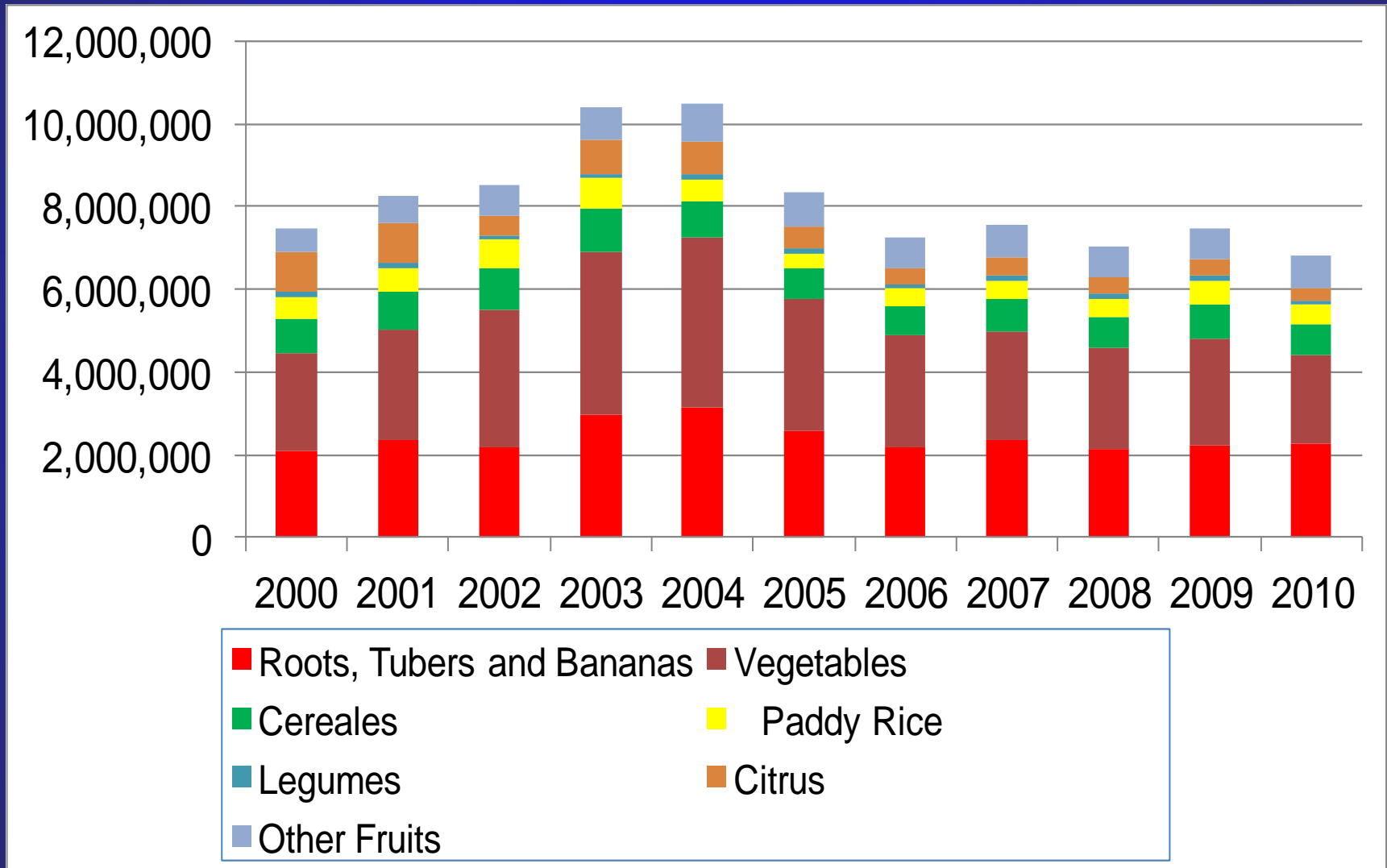
# Cuban Imports of TSRA-eligible Agricultural Products, **SHARE** by Major Suppliers, 2000-11





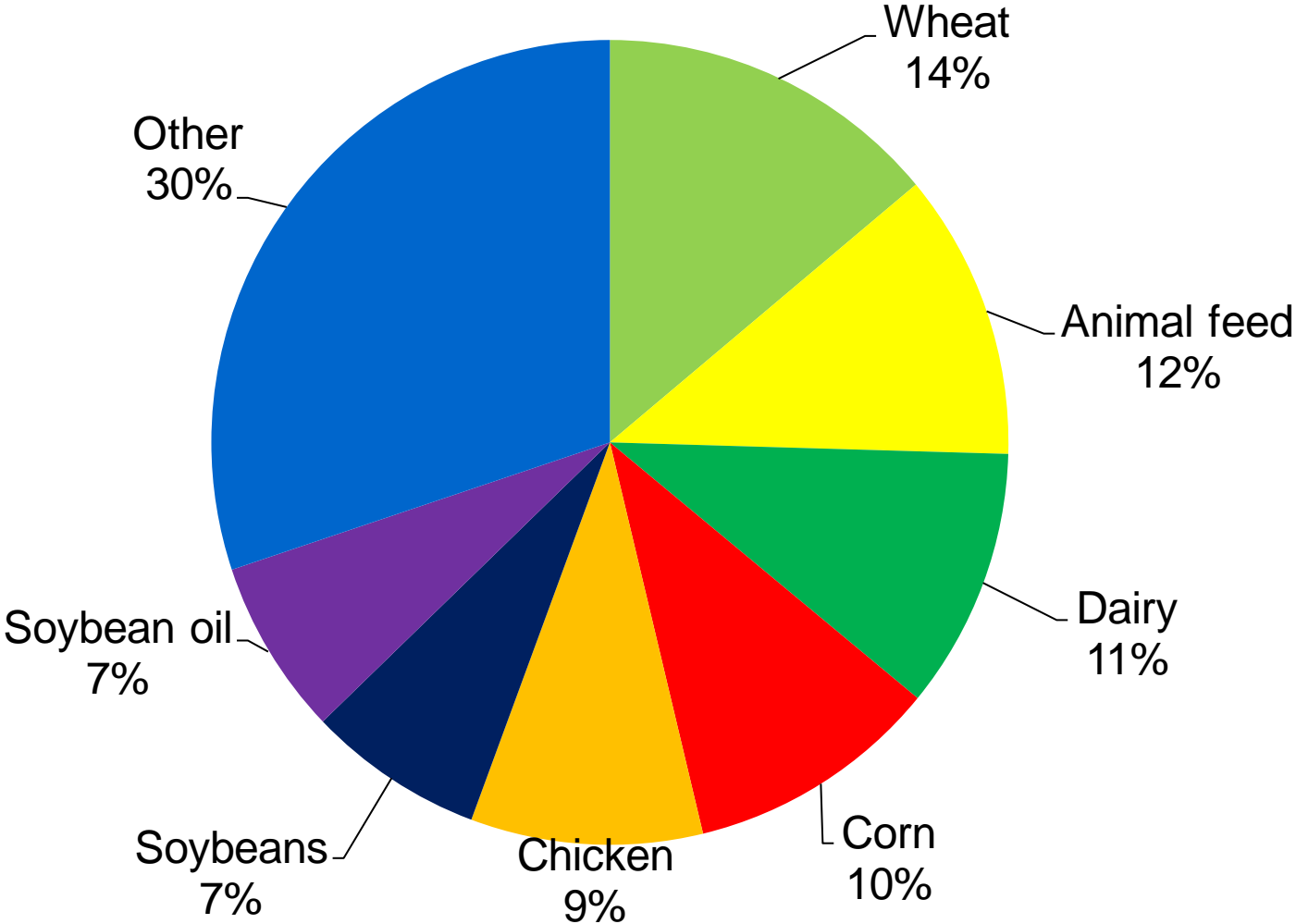
# Cuban Agricultural Production 2000-10

Metric tons

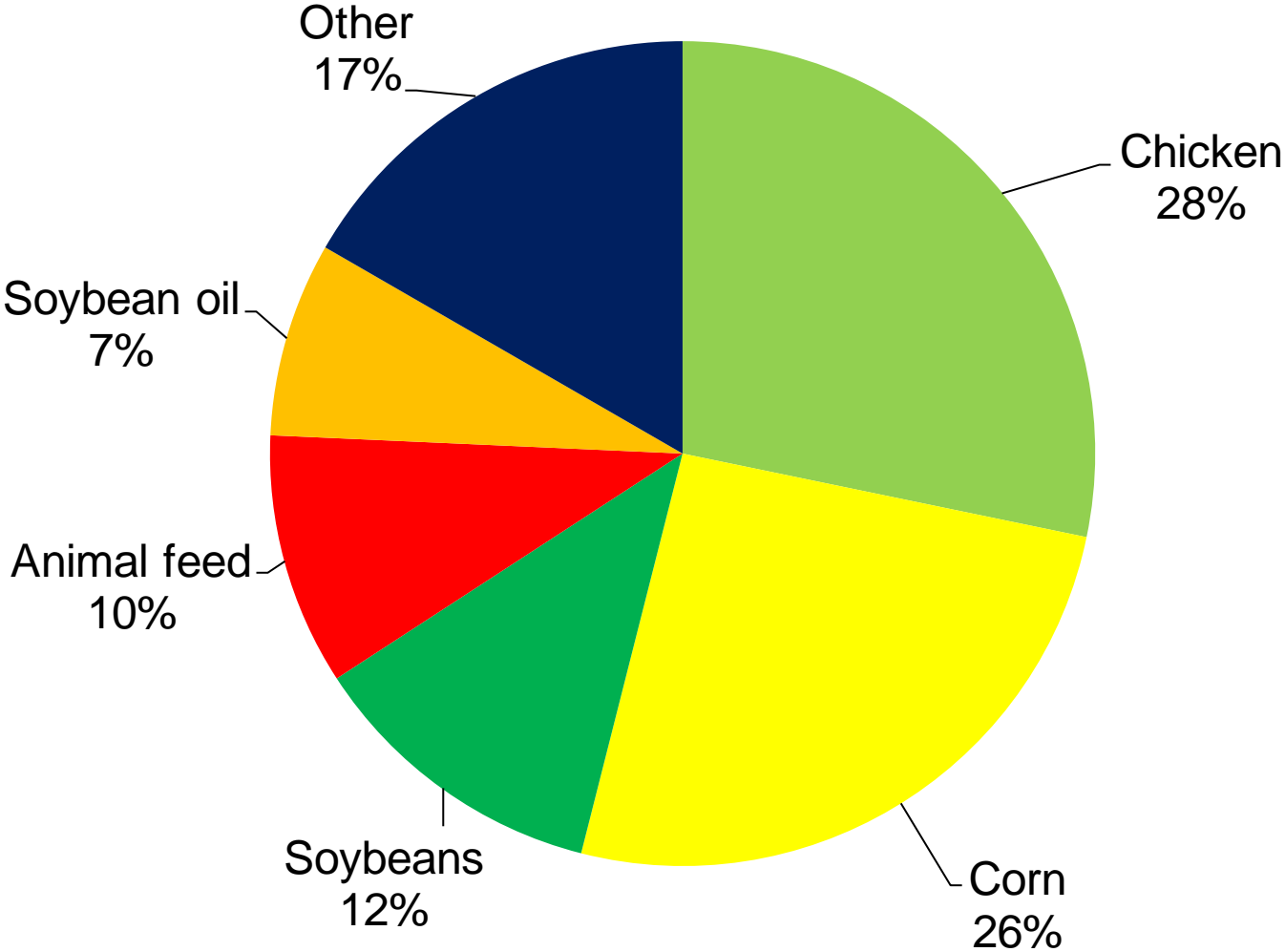


Source: Cuban Anuario Estadístico

# Cuban imports of TSRA-eligible agricultural products from World, by value 2010

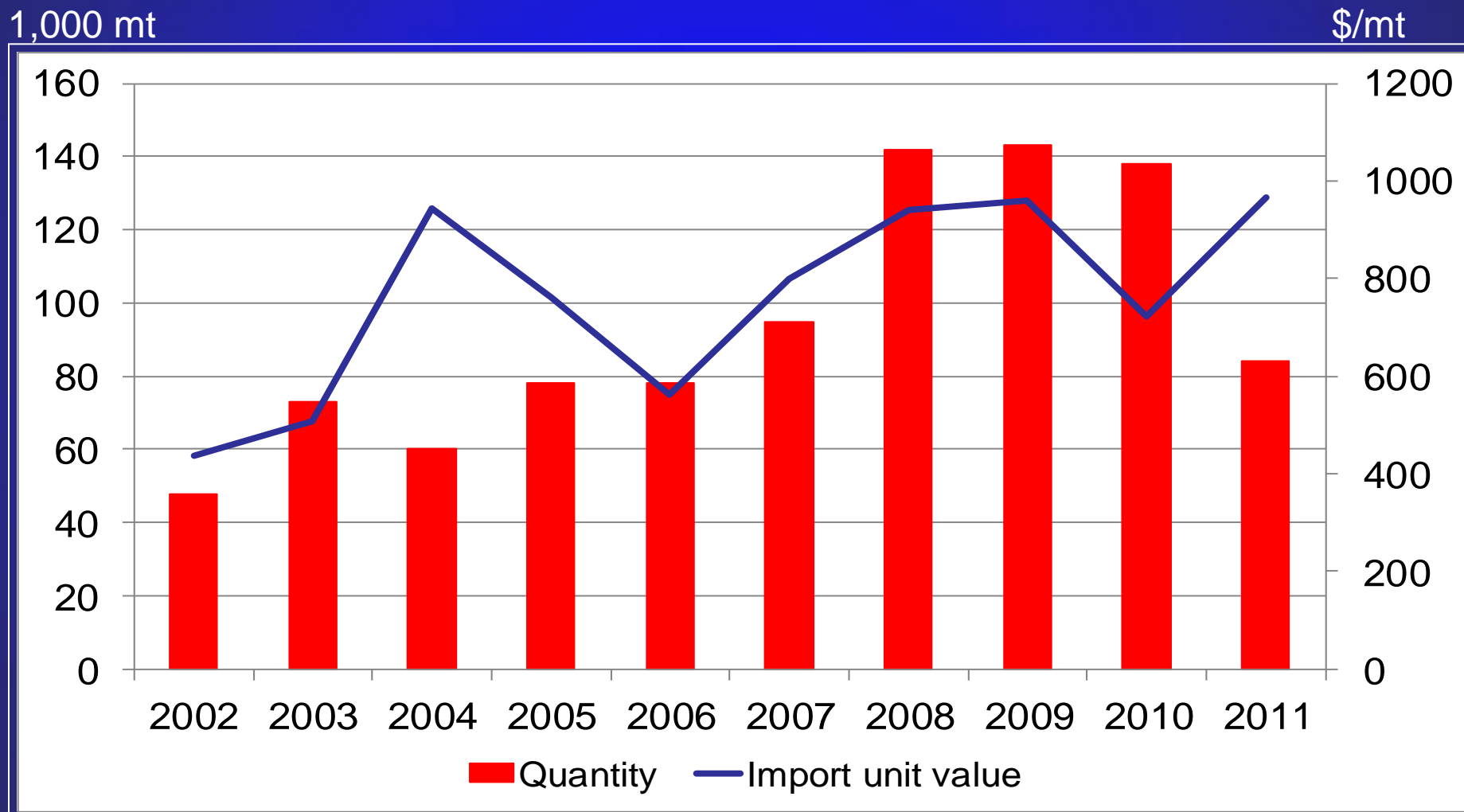


# Cuban imports of TSRA-eligible agricultural products from the United States, by value 2010



Source: GTIS

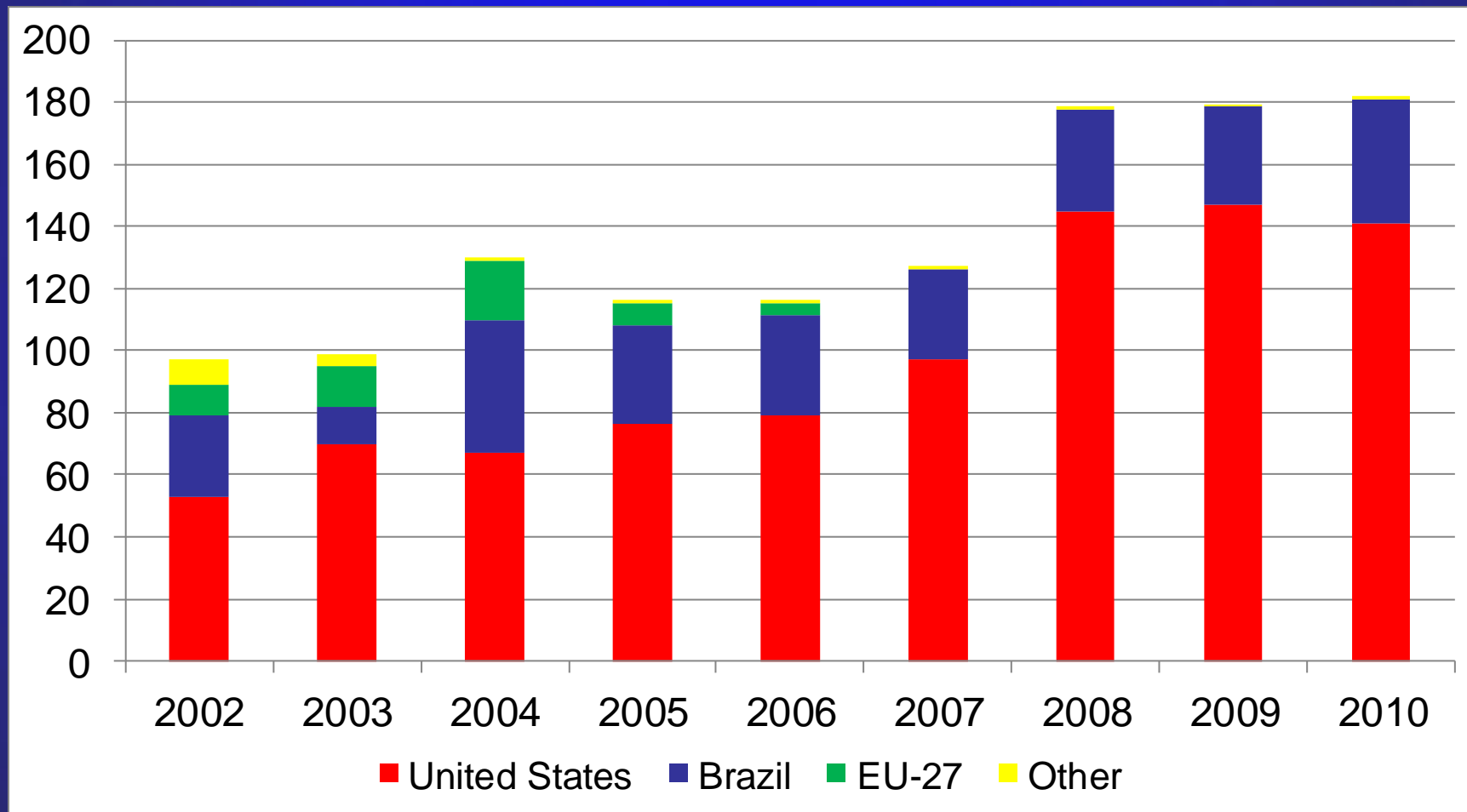
# Chicken: Cuban imports from the United States, 2002-11



Source: U.S. Department of Commerce

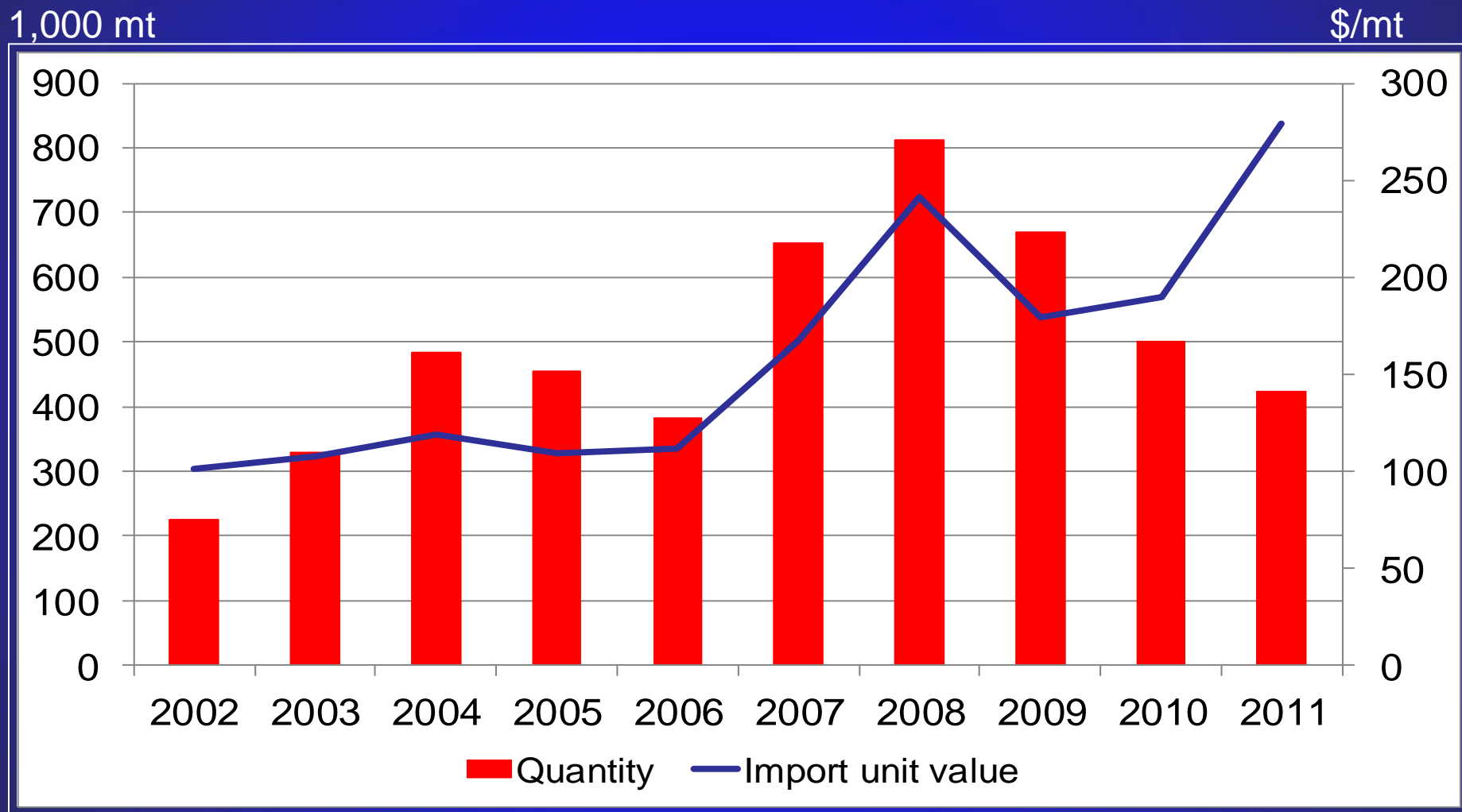
# Chicken: Cuban imports by country, 2002-10

1,000 mt



Source: GTIS

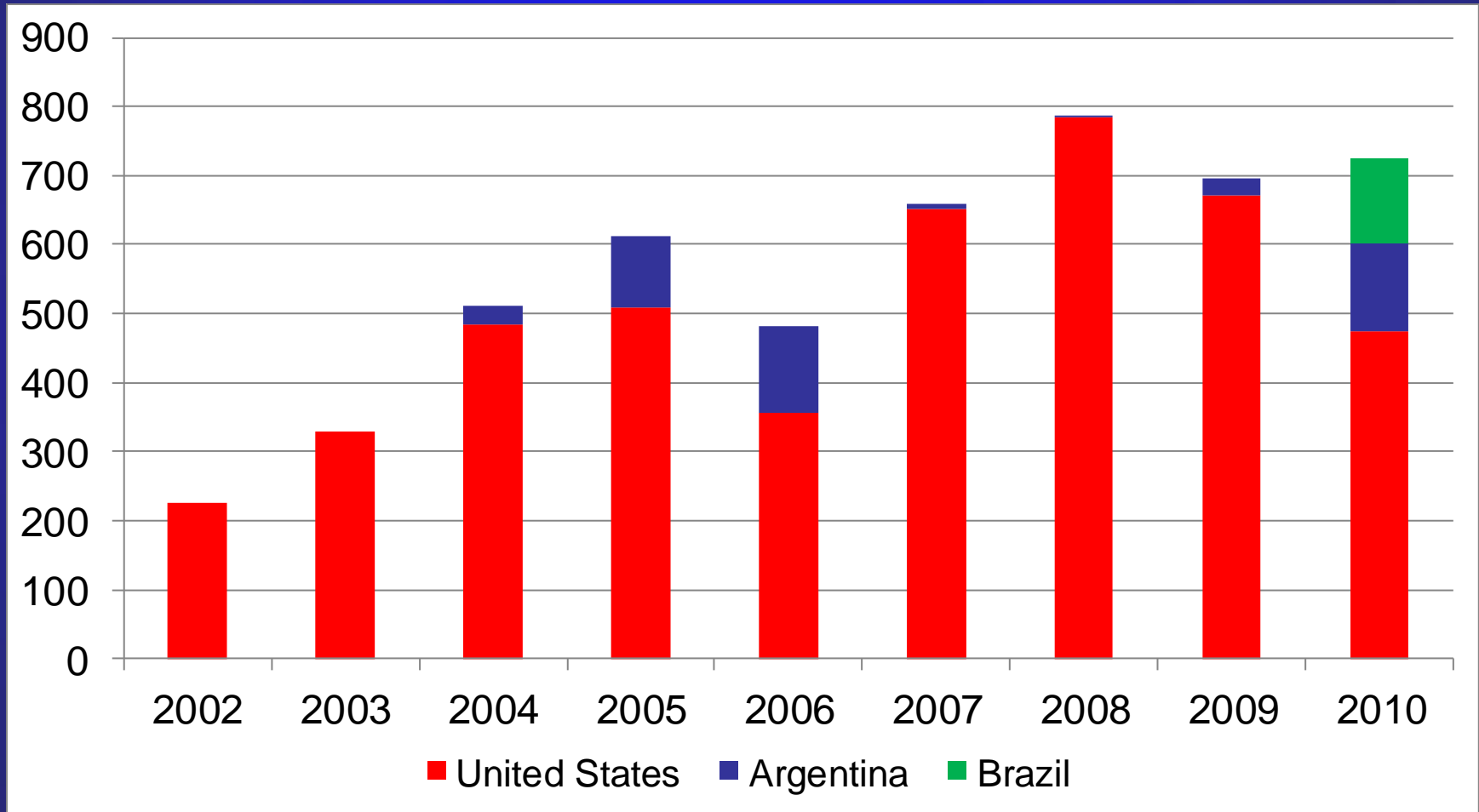
# Corn: Cuban imports from the United States, 2002-11



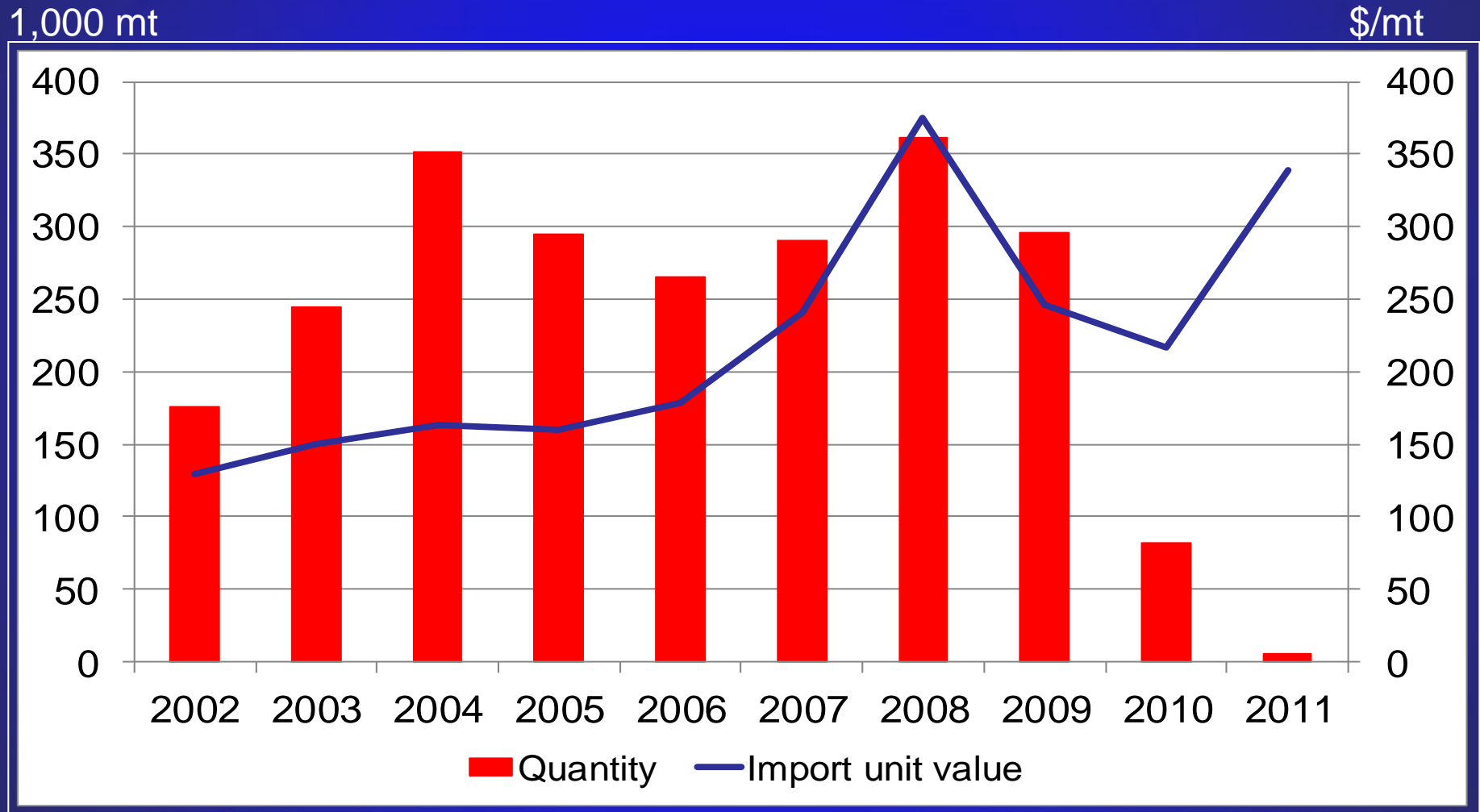
Source: U.S. Department of Commerce

# Corn: Cuban imports by country, 2002-10

1,000 mt



# Wheat: Cuban imports from the United States, 2002-11

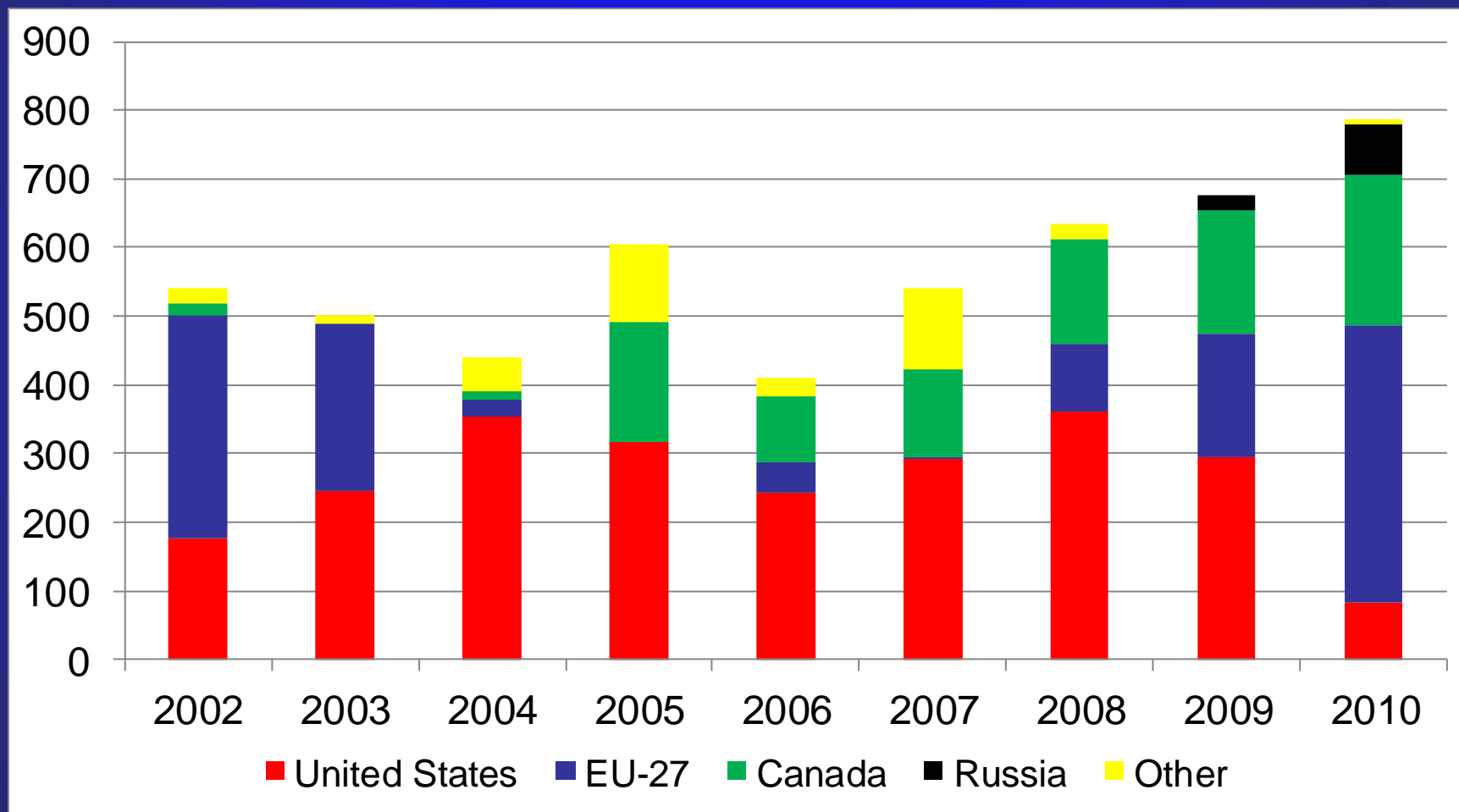


Source: U.S. Department of Commerce



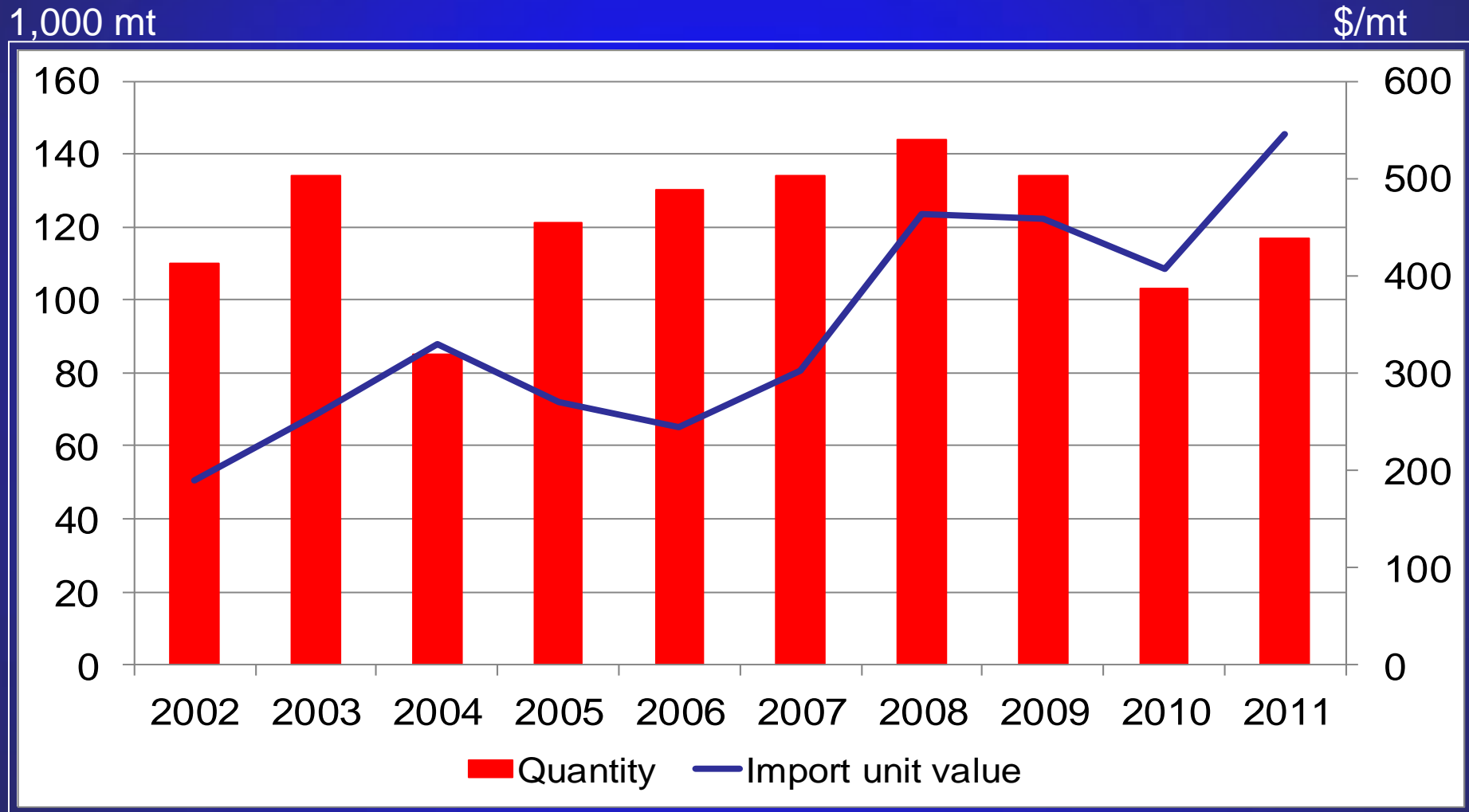
# Wheat: Cuban imports by country, 2002-10

1,000 mt



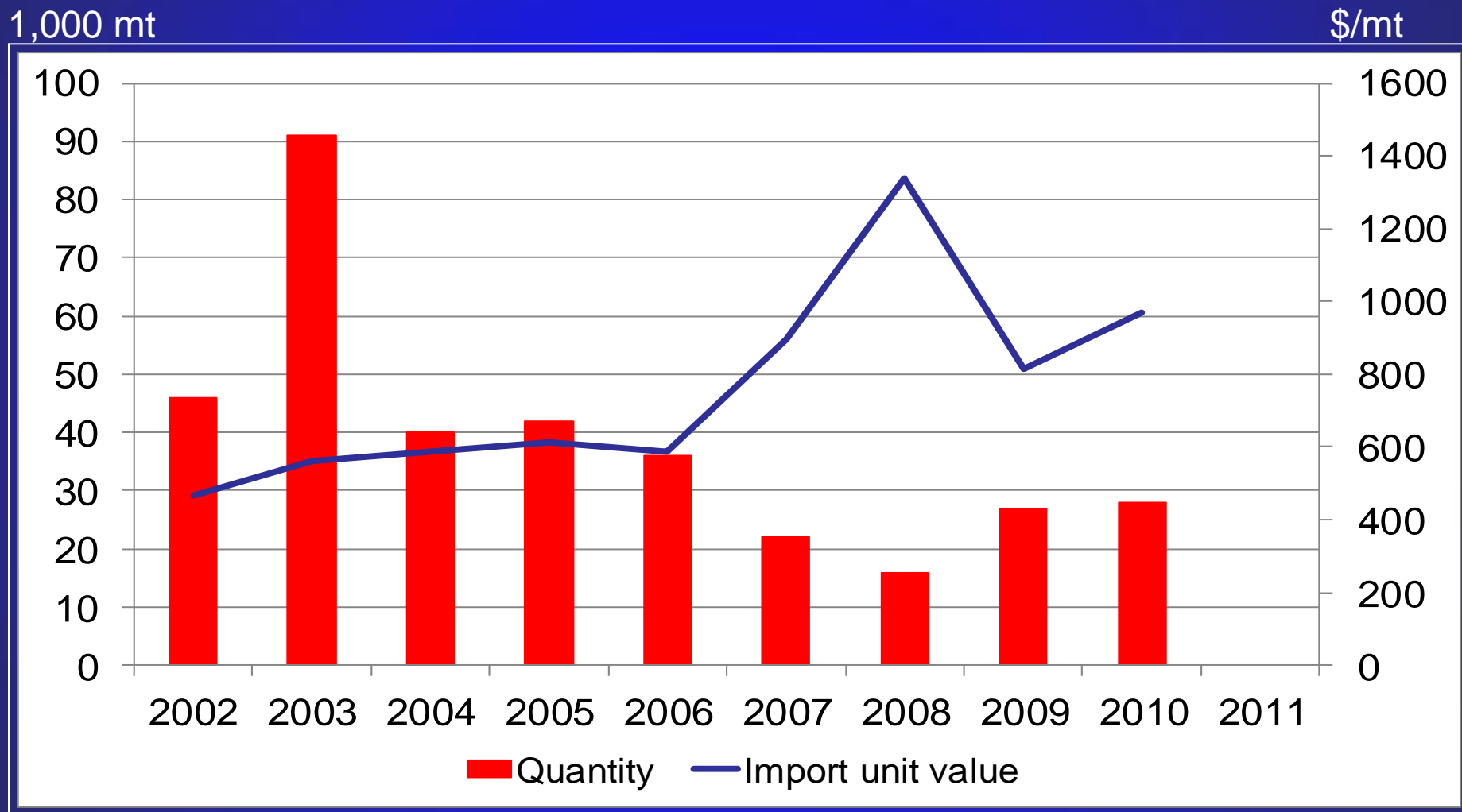
Source: GTIS

# Soybeans: Cuban imports from the United States, 2002-11



Source: U.S. Department of Commerce

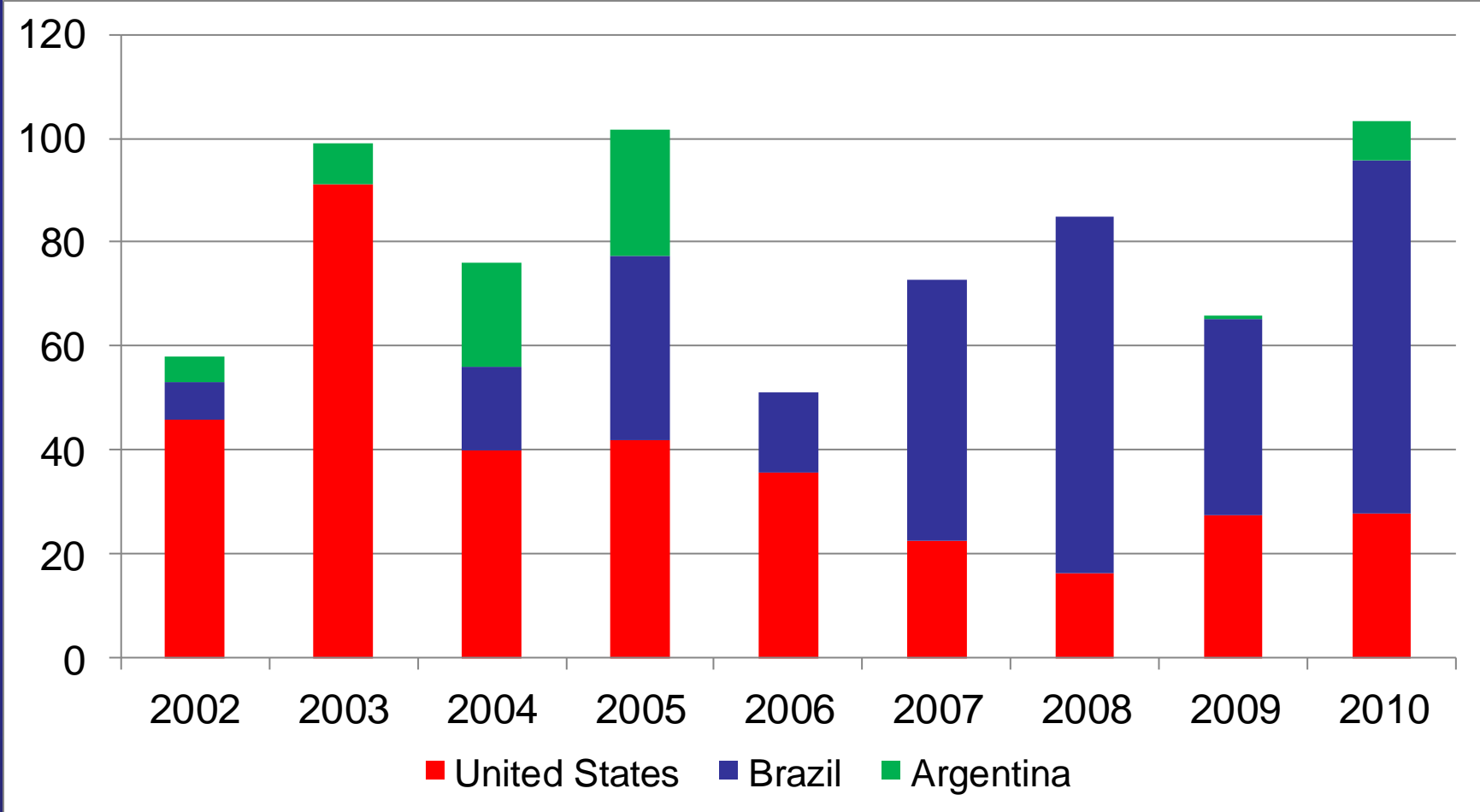
# Soybean oil: Cuban imports from the United States, 2002-11



Source: U.S. Department of Commerce

# Soybean oil: Cuban imports by country, 2002-10

1,000 mt

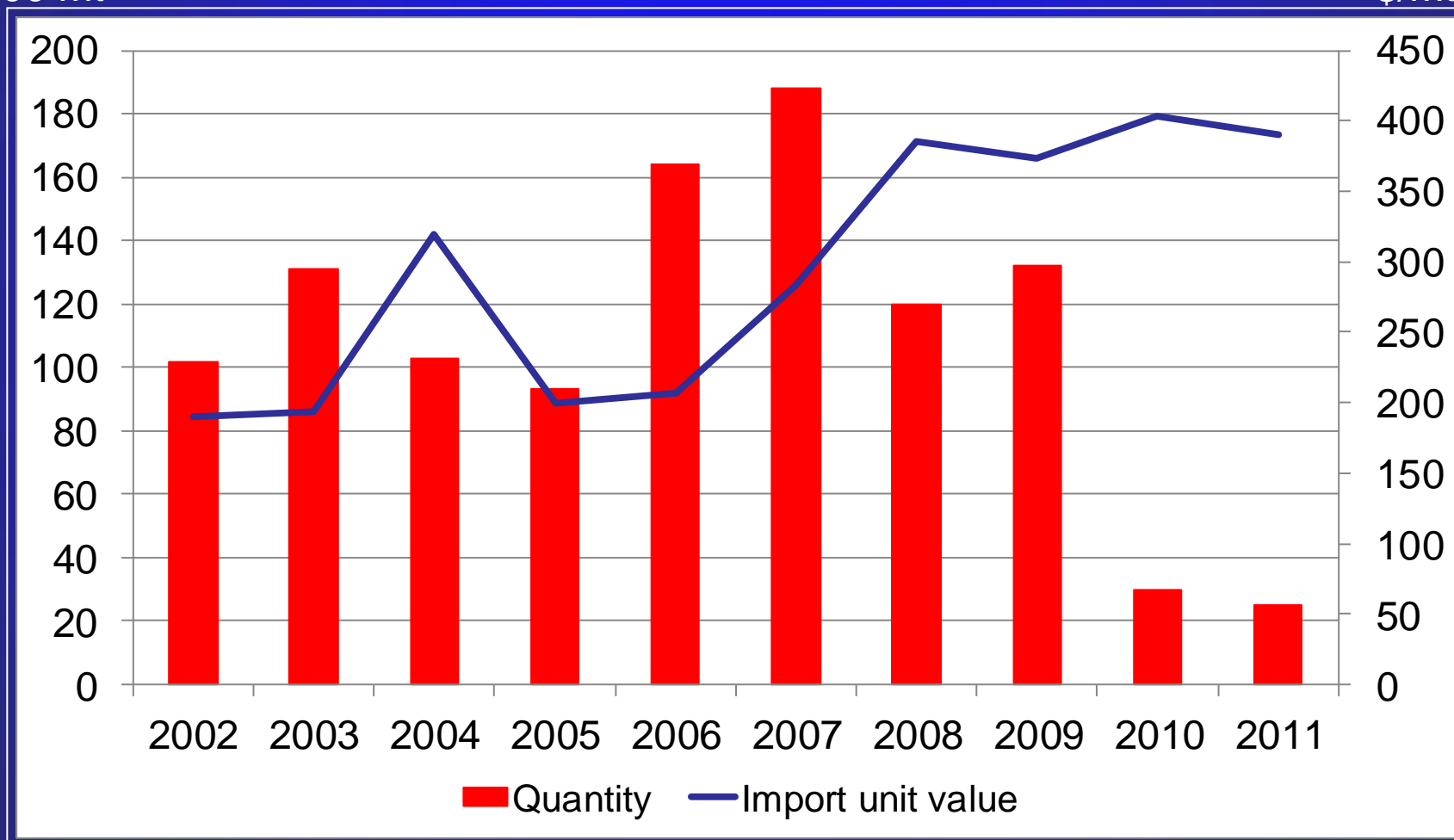


Source: GTIS

# Soybean meal: Cuban imports from United States, 2002-11

1,000 mt

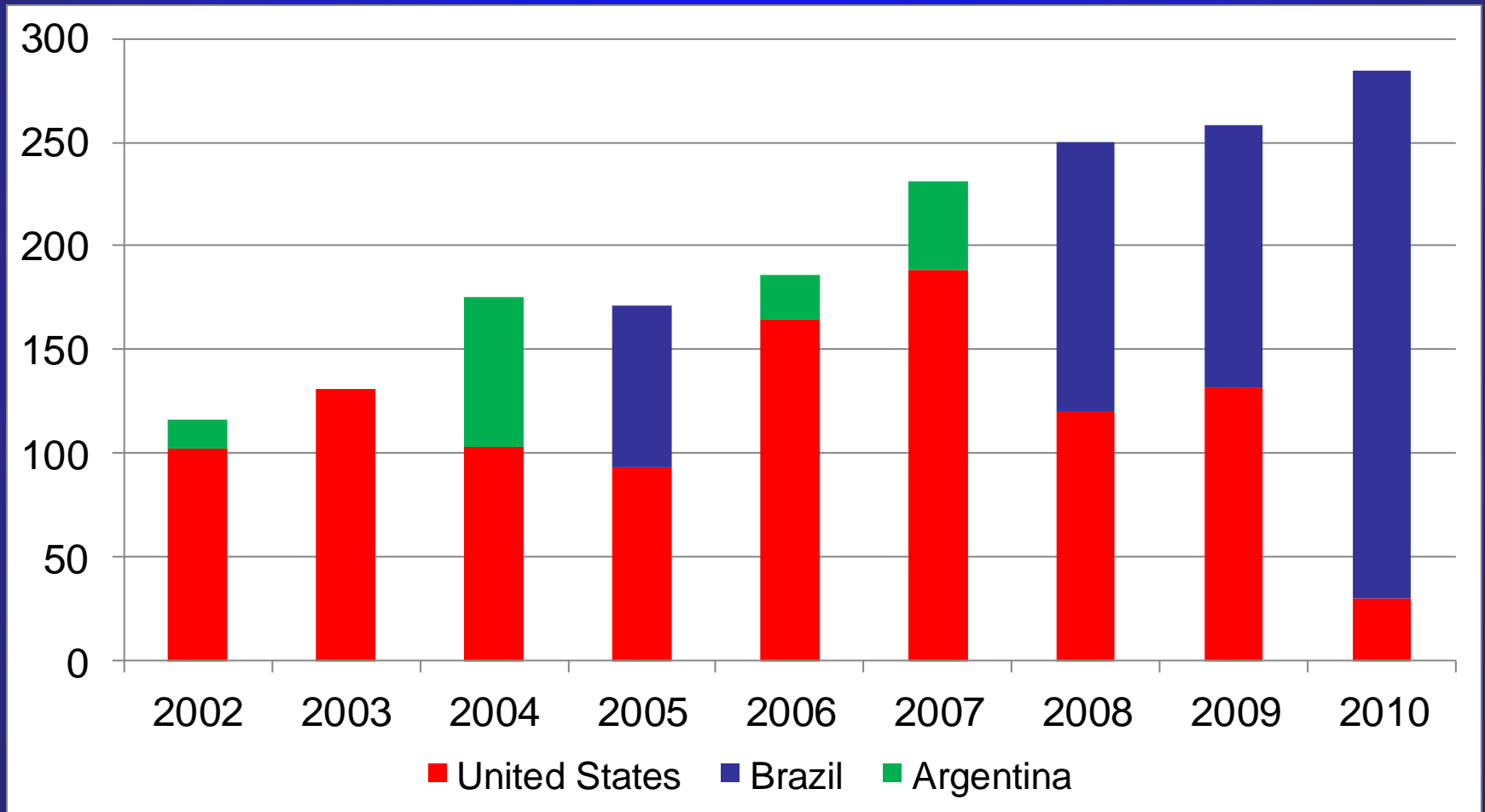
\$/mt



Source: U.S. Department of Commerce

# Soybean meal: Cuban imports by country, 2002-10

1,000 mt



Source: GTIS

# Prospects for the Future

- Expect U.S. food and agricultural exports to Cuba to stabilize in 2012, or perhaps decrease slightly
- HOWEVER Brazil is a wild card and could take U.S. share in some commodities
  - Brazil has recently invested in Cuba's poultry industry
  - President Rousseff's recent visit
  - \$680 million to rehab Port at Mariel
  - \$400 million in credits for food purchases
  - \$200 million to improve agriculture
  - AND if there is any question about Brazil's commitment . . .

# Cuban Sugar Farm, October 2011





# Cuban Sugar Farm, October 2011



# Prospects for the Future

- **What would it take to increase U.S. exports?**
  - **Credit sales – but not going to happen**
  - **Even if it did, who would want to sell on credit to Cuba when they are consistently ranked among the worst credit risks in the world, just a shade better than Somalia?**
- **One possible game changer . . .**

# Cuba's Potential Game- Changer: Oil!



Photo by:  
Javier Galeano  
Associated Press  
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