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Caribbean Basin

Caribbean Import Market for Fresh Vegetables

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Approved by:

Willis Collie

Caribbean Basin Agricultural Trade Office

Prepared by:

Fintrac Inc.

Report Highlights:

The Caribbean islands import more than \$40 million annually in fresh vegetables. The United States and the European Union are the two largest suppliers with each shipping approximately \$20 million. The EU exports primarily to the French and Dutch Islands while the United States ships mainly to the Dominican Republic, the Bahamas, and Bermuda.

Includes PSD changes: No

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Unscheduled Report

Miami [C11], C1

Caribbean Import Market for Fresh Vegetables

Overview:

The US and EU are both major suppliers of fresh vegetables to the Caribbean. Table 1 estimates total Caribbean market size by analyzing export statistics from the US, EU, and Canada. Exports from these three suppliers to the Caribbean totaled \$44.2 million in 1997. Of this amount, the US supplied \$20.0 million, the EU shipped \$21.1 million, and Canada exported \$3.1 million. EU imports are concentrated to the French and Dutch territories, with most other EU exports to the region comprised of potatoes.

Other imports in the region are supplied by South American countries (particularly Venezuela to Aruba and the Netherlands Antilles) as well as producers within the Caribbean itself.

Excluding Guadeloupe and Martinique, the largest Caribbean markets for fresh vegetables are Trinidad, the Netherlands Antilles, the Bahamas, Jamaica, and Bermuda. Items commonly imported from the US include potatoes, onions, lettuce, carrots, and tomatoes (see Table 2). These crops are in strong demand by retailers as well as by the hotel, restaurant and institutional (HRI) sector. US exports increased in 1997 (see Table 3), partially due to drought conditions in some of the islands that year.

Table 1: Vegetable Exports to the Caribbean from Major Suppliers
(f.o.b. in US\$ 000s)

Importing Country	US	EU	Canada	Total
Guadeloupe*	602	6,896		7,498
Martinique*	362	6,302		6,664
Trinidad & Tobago	603	2,127	1,515	4,245
Netherlands Antilles	2,732	1,432		4,164
Bahamas	3,735	193		3,928
Jamaica	1,632	1,516	373	3,521
Bermuda	3,441	1		3,442
Dominican Republic	1,903	850	137	2,890
Barbados	488	634	1,082	2,204
British Virgin Islands	1,961			1,961
Antigua & Barbuda	1,072	74		1,146
St Lucia	180	394	9	583
Cayman Islands	417			417

Importing Country	US	EU	Canada	Total
Aruba	167	229		396
Anguilla	339			339
Haiti	323			323
Dominica	84	78		162
Grenada	6	144		150
St. Kitts-Nevis		135		135
St Vincent/Grenadines	4	46		50
Turks & Caicos		6		6
Total	20,051	21,057	3,116	44,224

Source: Official Trade Statistics of the U.S, EU, Canada

*EU statistics for these markets are from 1996 (1997 unavailable)

Table 2: US Vegetable Exports to the Caribbean by Variety, 1997

(f.o.b. in US\$ 000s)

Importing Country	Potatoes	Onions	Tomatoes	Carrots	Cabbage	Lettuce
Antigua & Barbuda			41		3	
Aruba		10		3		113
Bahamas	149	69	300	58	133	288
Barbados	270		16	3		
Bermuda	21	3	159			19
Cayman Islands		13	90	8		26
Dominica	5	30		30		
Dominican Republic	646	580				
Grenada	6					
Guadeloupe	3			142		
Haiti		190				
Jamaica	543	250	15	217	47	
Martinique	12	3		327		

Importing Country	Potatoes	Onions	Tomatoes	Carrots	Cabbage	Lettuce
Netherlands Antilles						815
St Lucia	51	97				
St Vincent/Grenadines		4				
Trinidad and Tobago		135		450	7	
Total	1,706	1,384	621	1,238	191	1,261

Source: NTDB

Table 3: Selected US Vegetable Exports to the Caribbean by Variety, 1994-97

(f.o.b. in US\$ 000s)

Variety	1997	1996	1995	1994
Potatoes	1,706	1,124	442	399
Onions	1,384	599	1,689	1,894
Tomatoes	622	235	488	255
Carrots	1,238	1,317	1,235	1,547
Cabbages	191	27	29	15
Lettuce	1,261	831	361	348
Celery	35			
Total	6,436	4,133	4,245	4,458

Source: NTDB

The difficulty of producing on a scale large enough to meet both retail and HRI demand has necessitated a large degree of importation. Nevertheless, many governments have import bans to protect domestic growers. Commonly banned vegetables include carrots, sweet corn, root crops, and salad items like lettuce and tomatoes when in season.

These restrictions can leave wholesalers in an uncertain position with respect to supply, and many buyers report periodic difficulty in providing consumers with fresh vegetables. During supply shortfalls, the HRI sector will pay higher prices than retailers to meet tourist demand, leading to retail-level shortages. Such instances are usually the cause for temporary removal of the import bans.

Curacao (Netherlands Antilles)

Current Suppliers. According to official statistics, Curaçao imported US\$7.8 million of fresh vegetables in 1997, a slight increase over 1996 levels (see Table 4). The US accounted for 23 percent of total import volume in 1997, but was the largest supplier in terms of value. Other major suppliers included the Netherlands and Venezuela. According to official statistics, lettuce has been the major vegetable supplied to the Netherlands Antilles by the US over the past four years; during this time US exports of lettuce to the Netherlands Antilles has increased from \$160 thousand in 1994 to \$815 thousand in 1997.

Table 4: Curaçao Vegetable Imports, 1997

Supplier	Value (US\$000s, fob)	Share	Volume (MTs)	Share
US	3,574	46%	3,987	23%
Netherlands	2,022	26%	6,042	35%
Venezuela	354	5%	5,037	29%
Great Britain	115	1%	58	0.34%
Canada	94	1%	88	0.50%
Other	1,624	21%	2,212	13%
Total	7,784		17,423	

Source: Official Statistics of Curaçao

Distribution and Sales Channels. Curaçao's major container port is St. Annabaai. The major food wholesalers are Consales, J.P. Maal, Posner's Agencies, and C. Winkel and Zomen. The five main supermarkets are Centrum (2 stores), Esperamos, Las Vegas, Mangusa (2 stores), and Pita (2 stores). Though these supermarkets account for roughly 50 percent of retail food sales, there are over 100 small stores or "mini-markets" located throughout the island for convenience purchases.

Table 5 provides a listing of selected vegetable products found at local supermarkets in Curaçao during a December 1998 survey.

Table 5: Selected Fresh Vegetables Found at Curaçao Supermarkets

Product	Brand/Variety	Origin	Size	Price (NA Guilders)	Price (US \$)
Beansprout	Dole brand	US	kg	4.25	2.42
Broccoli	T&A brand	US	head	2.00	1.14
Broccoli	Dole brand	US	kg	6.50	3.71
Cabbage	Green		kg	2.45-3.25	1.40-1.85
Cabbage	Red		kg	2.90-3.25	1.65-1.85
Carrots	Veri Fine brand	Canada	lb bag	2.85	1.62
Cauliflower	T&A brand	US	head	3.95	2.25
Cauliflower	Ocean Mist brand	Canada	pack	4.45	2.54
Cauliflower		US	pack	3.00	1.71
Chicory			kg	6.50	3.71
Corn			kg	3.35	1.91
Cucumbers			kg	2.25-2.95	1.28-1.68
Garlic			kg	10.70-10.95	6.10-6.24
Green peppers			kg	5.50-5.89	3.14-3.36
Lettuce			kg	2.49-4.18	1.42-2.38
Lettuce	Romaine		kg	5.60	3.19
Lettuce	Dole brand iceberg	US	head	2.00	1.14
Lettuce	Boston	US	kg	8.50	4.85
Longbeans			kg	6.70	3.82
Mushrooms	Modern brand	US	kg	5.95	3.40
Mushrooms	Prime	US	pack	3.35	1.91
Okra			kg	4.76	2.71
Onions	large		bag	10.30	5.87
Onions			kg	2.00-3.00	1.14-1.71

Product	Brand/Variety	Origin	Size	Price (NA Guilders)	Price (US \$)
Parsley	Dole brand	US	bunch	1.25	.71
Potatoes			2.5 kg bag	3.50	1.99
Potatoes		Netherlands	2.5 kg bag	2.95	1.68
Potatoes	Idaho	US	kg	2.60	1.48
Pumpkin			kg	1.75	.99
Spinach			kg	3.50	1.99
Sweet potatoes			kg	3.95	2.25
Tomatoes	Mansano brand		kg	4.25	2.42
Tomatoes	Pesetas brand		kg	4.25	2.42
Tomatoes	Peritas brand		kg	5.50	3.14
Tomatoes	Mamaticas brand		kg	3.50	2.00
Turnips			kg	4.98	2.83

Source: On-site supermarket surveys, December 1998

Note: Exchange rate (US\$ 1.00 = NA Guilders 1.75)

Consumer Preferences. Retailers in Curaçao carry a full range of vegetable products imported from the US, Netherlands and Venezuela. Higher than average incomes and a competitive retail market have introduced local consumers to many different vegetable varieties. Trends and buying preferences generally follow the US and European markets. While many consumers are price-conscious, others will pay more for well-known brands. Consumers are familiar with US and European (mainly Dutch) food products, and there is an assumption that both are of high quality.

Import Requirements. There are a number of products that are prohibited entry into Curaçao, notably cucumbers, sweet potatoes, eggplant, sweet peppers, hot peppers and many other fresh vegetables produced locally. For products not banned for import, a permit is required. Import permits can be obtained for banned products when domestic production is not insufficient to meet demand.

Tariffs and Duties. Curaçao levies two basic import duties: a standard tariff rate levied against the c.i.f. value of a product, and an “economic levy” which applies to imports of goods that are produced locally. Application of the economic levy has recently been phased out of many products including vegetables, and the only import duty applicable to fresh vegetables is a tariff rate of 5.5 percent.

Jamaica

Current Suppliers. Jamaica produces many vegetables for domestic consumption, including carrots, cabbage, lettuce, potatoes, onions, tomatoes, peppers and sweet corn. Because local production is insufficient to meet both retail and HRI demands, Jamaica imports large volumes of most of these crops. In 1997, the total import market for fresh vegetables was valued at US \$7.4 million, supplied by the US (47 percent import market share), the Netherlands (35 percent), and Canada (15 percent). See Table 6.

Dutch and Canadian imports are comprised mostly of potatoes and onions (see Table 7). The US supplies a wider range of vegetables, including onions, potatoes, carrots, lettuce, cabbage, tomatoes, and sweet peppers.

Table 6: Jamaica Imports of Fresh Vegetables, 1997

Supplier	Value (US\$ 000s cif)	Share	Volume (MTs)	Share
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US	3,170	43%	9,673	47%
Netherlands	2,859	39%	7,187	35%
Canada	947	13%	3,150	15%
Other	134	5%	714	3%
Total	7,377		20,724	

Source: Jamaican Institute of Statistics

Table 7: Jamaica Imports of Selected Vegetables by Supplier, 1997 (US\$ 000s)

Source	Potatoes	Tomatoes	Onions	Cabbage	Lettuce	Carrots	Sweet Corn	Sweet Peppers
Netherlands	1,683		927	15		4		
US	516	142	549	181	318	396	128	131
Canada	241		310	40		342	6	
Belgium	122							
China	3		6	5				
N.A.	55		6					
Mexico			10			13		
Luxembourg	27							
France	14							
Israel						6		
Taiwan							.8	
UK							.2	
Selected Total	2,662	142	1,807	241	318	760	135	131

Source: Jamaican Institute of Statistics

Distribution and Sales Channels. Jamaica has two major international seaports, Kingston and Montego Bay, which serve the southeastern and northwestern coasts, respectively. The island is serviced by over thirty international shipping lines.

A few large companies import and distribute products on an exclusive basis. These include Grace Kennedy, T. Geddes Grant, Facey Commodity, Wisynco Trading, Charles E. Ramson, Musson, Amalgamated Distributors, MAPP Successors, and Hand Arnold. The main supermarkets are Sovereign Markets, Hi-Lo Food Stores, and Shopper's Fair. There are several types of retail food outlets in Jamaica, including upscale supermarkets, conventional large supermarkets, convenience supermarkets, local family markets, convenience stores, wholesale markets, specialty and street vendors.

Table 8 provides a listing of selected vegetable products found at local supermarkets in Kingston during a December 1998 survey.

Table 8: Selected Fresh Vegetables Found at Jamaican Supermarkets

Product	Brand/Variety	Origin	Size	Price (Jamaica \$)	Price (US \$)
Yam	Yellow	Jamaica	lb	25.99	.72
Potato	Irish	Jamaica	lb	16.99	.47
Tomato		Jamaica	lb	26.99	.74
Onion		Jamaica	lb	33.00	.91
Snow Peas		Jamaica	lb	55.00-70.00	1.52-1.93
Bean Sprout		Jamaica	lb	50.00-60.00	1.38-1.66

Product	Brand/Variety	Origin	Size	Price (Jamaica \$)	Price (US \$)
Pumpkin		Jamaica	lb	25.00-30.00	.69-.83
Cabbage	Green, Chinese	Jamaica	lb	27.99	.77
Corn		Jamaica	ear	33.00	.91
Yam	Negro	Jamaica	lb	10.00-15.00	.28-.41
Sweet Pepper		Jamaica	lb	70.00-80.00	1.93-2.21
Scallion		Jamaica	lb	60.00-70.00	1.66-1.93

Source: On-site supermarket survey, December 1998

Note: Exchange rate (US\$ 1.00 = J\$ 34.75)

Consumer Preferences. Major vegetable imports include carrots, cabbage, potatoes, onions, tomatoes, sweet pepper, and sweet corn. According to retailers, these are the most popular vegetables with local consumers, for whom domestic production is not sufficient to meet retail demand throughout the year. Tomatoes, radishes, turnips and lettuce are also in strong demand. Among lettuces, iceberg and romaine are the preferred varieties, and one importer noted an increase in demand for iceberg lettuce over the past year.

Import Requirements. Parties wishing to import fresh vegetables must secure an import permit from the Ministry of Agriculture's Plant Quarantine office. Otherwise, there are no permanent restrictions or quotas on the importation of fresh vegetables into Jamaica.

Tariffs and Duties. The following charges apply to Jamaican imports of fresh vegetables:

- A Standard tariff rate that is levied against CIF value; the government of Jamaica maintains a tariff rate of 40 percent for imports of most fresh vegetables. Notable exceptions include garlic and potato seed that have no tariff rate.
- A Stamp duty, applicable on certain products, which is levied against the sum of the CIF value and standard tariff amount; the Stamp Duty for fresh vegetable imports varies by product but generally falls between 32 and 36 percent.

The General Consumption Tax, applicable on certain food products, does not apply to fresh vegetables (but does apply to frozen/processed items).

In addition, Jamaican Customs levies a processing fee on all imported shipments of J\$100 (less than US\$3).

Bahamas

Current Suppliers.

Total Bahamian vegetable imports for 1997 were \$16.8 million. A wide variety of fresh vegetables are imported (see Table 9). Although imports of some vegetables are seasonally banned to protect local producers, the large domestic population and booming tourist sector creates strong demand for imports such as carrots, cabbage, tomatoes, and lettuce.

Most vegetable imports are brought in from Miami-based consolidators, who supply the Bahamas with products of both US and international origin. It is therefore not possible to calculate market share by international supplier since nearly all vegetable imports are listed by Bahamas' Customs authorities as products of US origin. In spite of this fact, it is known that vegetables are supplied by other providers, such as tomatoes and cucumbers from Mexico and Central America,

which may be consolidated in Miami for shipment to the Bahamas in the same containers as US produce.

Two vegetables not domestically produced in great measure, and therefore not subject to import restrictions, are potatoes and onions. In addition to the US, other suppliers of these crops include Canada, New Zealand, Australia and Jamaica.

Table 9: Bahamas Top Fresh Vegetable Imports, 1997

Product	Value (US \$ 000)	Volume (MT)
1. Potatoes	2,110	7,705
2. Onions	1,348	3,853
3. Tomatoes	1,241	2,074
4. Iceberg Lettuce	1,098	2,092
5. Carrots	537	1,376
6. Cabbage	486	2,056
7. Sweet Peppers	401	739
8. Miscellaneous Lettuces	389	579
9. Mushrooms	366	356
10. Broccoli	335	482
11. Celery	318	640
12. Romaine	245	385
13. Other lettuces	193	317
14. Cauliflower	190	234
15. Asparagus	139	165
16. Garlic	132	132
17. Corn	131	292
18. Squash	129	199
19. Other brassicas	114	91
20. Other root crops	95	139
21. Cucumbers	74	171
22. Eggplant	42	86
23. Leeks & other al.	26	36
24. Radishes	26	49
25. Brussel Sprouts	18	36

Source: Bahamas Department of Statistics

Distribution and Sales Channels. Nassau is the largest port in the Bahamas and handles most of the commercial traffic, including food imports. Freeport is currently being expanded to accommodate container vessels. The Bahamas also has five international airports, with the two largest at Nassau and Freeport.

It is estimated that there are less than twenty food wholesalers in the Bahamas, including Asa H. Pritchard, Jagar, D'Albenas, and Nassau Hotel and Restaurant Supply. The Grand Bahamas Food Company and the Thompson Trading Company are two medium-sized wholesalers. The wholesale business is reported to be increasingly competitive as many grocery stores, including warehouse-type discount outlets, are importing direct from manufacturers or through Miami-based wholesalers.

There are over 200 grocery stores in the Bahamas, most of which are small. The three major grocery store chains are City Markets (owned by US-based Winn Dixie), Super Value, and John Chea and Sons. There is also Solomon's that operates both as a traditional wholesaler and as a retailer in that it sells directly to the public out of its warehouse, and

Costrite, which is similar to a Costco or Sam's Club in the United States. Costrite, which sells apparel and home furnishings along with food, is a membership club that offers food products packed in bulk and/or institutional-sized quantities.

Table 8 provides a listing of selected vegetable products found at local supermarkets in the Bahamas during a December 1998 survey.

Table 10: Fresh Vegetables Found at Bahamas Supermarkets

Product	Variety	Origin	Size	Price (US \$)
Arugula	Rock Garden brand	US	¾ oz	2.69
Baby Carrots	Grimway brand		lb	2.69
Brussel Sprouts	Dole brand	US	12 oz	4.99
Cabbage	Green	Bahamas	lb	.59
Carrots	Mity Rabbit brand	Canada	2 lb pack	1.69
Cauliflower		US	head	3.29
Celery	Dole brand	US	lb	1.39
Cucumber	Regular	US	lb	1.90
Cucumber	Seedless	EU	lb	2.90
Lettuce	Romaine	US	16 oz	3.99
Lettuce	Red Leaf	US	head	2.59
Lettuce	Green Leaf	US	head	2.59
Lettuce	Iceberg	US	head	1.19
Potatoes	Idaho	US	3 lb bag	1.00
Potatoes	Polly brand	US	5 lb bag	1.69
Rosemary	Rock Garden brand	US	¾ oz	2.69
Sage	Rock Garden brand	US	¾ oz	2.69
Sweet Pepper		US	lb	1.39
Tomatoes		US	lb	1.39

Source: Supermarket survey, December 1998

Consumer Preferences. According to retailers, fresh vegetables popular with local shoppers include tomatoes, cucumbers, celery, carrots, lettuce, cabbage, onions, sweet pepper and potatoes. Local consumers are normally price-conscious although a higher-end market does exist. Among lettuces, for example, there is strong demand for iceberg as well as more expensive romaine and red leaf. Retailers also report customer requests for specialty products like baby carrots, sweet carrots, and seedless cucumbers.

Miami suppliers will often complement shipments of US vegetables destined for the Bahamas with product sourced abroad. Retailers also carry locally-produced cabbage, tomatoes, and cucumbers, which are popular due to their high taste quality despite their relatively inferior appearance. According to retailers, price and taste are more important factors in consumer behavior than product appearance and origin.

Import Requirements. All products entering the Bahamas are required to meet US food safety standards. Import permits are required for all fresh vegetable products, and certain vegetables such as tomatoes, carrots, lettuce, and cabbages may be seasonally barred in order to protect local growers. During production shortfalls, hotel and institutional buyers reportedly have less trouble obtaining import permits than wholesalers.

Tariffs and Duties. Bahaman food imports are assessed a stamp tax of 2 percent on the CIF value of the product. In

addition, the Bahamas maintains a tariff rate of 25 percent for **most** fresh vegetables, with the following exceptions:

- Potatoes – no tariff
- Onions – 10 percent
- Shallots – 10 percent
- Cabbage – 10 percent

Bermuda

Current Suppliers. The US is the largest supplier of fresh vegetables to Bermuda, accounting for over 97 percent of vegetable imports by value (see Table 11). Vegetable imports have generally remained within the \$6.6 million to \$6.9 million range over the last three years.

Major US vegetable exports to Bermuda include tomatoes, lettuce, potatoes, and cabbage – although a wide range of vegetable are actually supplied (see Table 12). Bermuda’s upscale tourism sector, as well as the strong purchasing power of its citizens, combine to create an attractive market for high quality US production.

Table 11: Bermuda Vegetable Imports, 1995-97 (prices are f.o.b. in US\$ 000s)

Supplier	1997	1996	1995	Current share (1997)
United States	6,485	6,470	6,704	97.48%
Other:	167	112	210	2.52%
- Italy	56	50	0	0.83%
- Canada	37	22	92	0.56%
- UK	29	26	66	0.44%
- Jamaica	24	12	45	0.35%
- Dominican Republic	15	0	0	0.22%
- Other	7	3	8	0.11%
Total	6,652	6,583	6,914	

Source: Bermuda Department of Statistics

Table 12: US Vegetable Exports to Bermuda, 1994-97 (f.o.b. in US\$ 000s)

Variety	1997	1996	1995	1994
Potatoes	149	94	118	117
Onions	69	85	32	63
Tomatoes	300	62	96	108
Carrots	58		3	3
Cabbages	133	6	4	6
Lettuce	288	19	67	25
Celery	35			
Total Selected	1,031	266	320	322

Source: NTDB

This has been fueled by access to American television media, providing the people of Bermuda with exposure to US consumer trends. Bermuda’s relative proximity to the US with respect to shipping and strong ties in business and tourism also help account for its prominent role in this market.

Distribution and Sales Channels. There is one port at Hamilton that serves all ocean freight with shipments arriving once or twice a week. Bermuda's international airport makes air freight available but expensive: air freight generally runs \$.40/lb, and is expected to increase to as much as \$.80-96/lb due to future cutbacks in airline service. It is hoped that increased coordination among shippers will make ocean freight more flexible. For example, weekly food shipments from Salem and Elizabeth, New Jersey, are expected to begin arriving on different days of the week instead of the same day; in effect, wholesalers will be able to rely on two shipments per week instead of one.

Bermuda's supermarkets include The Marketplace, Arnold's, Lindo's Family Foods, The Supermart, and White's. While a few independent importers operate on the island, most retailers are supplied by a handful of importer/distributors including Butterfield Vallis, Winter-Cookson Petty, BGA Group, A.C.Brewer Distributors, and Viking Food Ltd. In addition to the retail sector, these groups also handle the majority of food distribution for hotels, restaurants and institutional food buyers.

Product Details. The following table shows vegetable products found at Bermuda supermarkets during a 1998 survey:

Table 13: Fresh Vegetables Found at Bermuda Supermarkets

Product	Origin	Brand/Variety	Size	Price (US \$)
Potatoes	US	Russett	5 lb	1.99-2.99
Mushrooms	US		10 oz	1.99
Eggplant			lb	1.79
Cabbage			lb	.59-.79
Celery Stalks			stalk	1.79
Turnips		Yellow	lb	.79
Squash		Butternut	lb	.79-.95
Tomatoes	US	Vine Ripe	lb	1.95-3.00
Potatoes	Canada	Yukon Gold	lb	.95
Broccoli crowns			lb	1.49
Lettuce		Iceberg	head	1.50-2.85
Celery hearts			pkg	2.00
Asparagus		Fresh cut	lb	3.99
Cauliflower			head	2.95
Carrots			5 bunch	1.75-2.75
Pre-packaged Salads	US		12 oz	3.75-4.85

Source: Supermarket surveys and interviews with retailers

Consumer Preferences. Despite frequent bans on imports of domestically produced items, Bermuda purchases a variety of vegetables from the US. Bermudan consumers, with healthier than average per capita incomes, are keen to try new products and importers have noted growing sophistication in segments of the vegetable market. With mushrooms, for example, there is increasing demand for exotics such as shiitake, criminis and brayburn, and demand for Portobello continues to be strong.

In addition, Bermudan consumers also show interest in value-added products like pre-packaged foods. The market for pre-packaged salads, led by T&A brand and distributor labels, is now competing strongly with iceberg lettuce. One retailer reports that the average consumer would rather buy a more expensive Spring Mix or Caesar Salad pack (also containing croutons and dressing) than a cheaper head of iceberg. Also important is the overall look of the package. Despite their popularity, retailers have a difficult time keeping them in stock due to short shelf-life, furthermore limited by the 2 days freight time needed to bring products from the US to Bermuda.

Other items in demand include carrots and corn. Local carrots are shorter in appearance and have fatter ends and are sweeter than US varieties. Despite their high quality, they are unnecessarily expensive (the ban is reportedly due to a previous plant disease outbreak). Although local production normally lasts from December to June, producers are supposed to be able to supply the island's retail and tourist sectors throughout the year. According to retailers, this is not always true. One store manager reported that he would carry more carrots if possible, along with fresh corn. In spite of the import ban, certain carrot-based products are allowed to be imported, such as shredded carrots used by the HRI sector for cole slaws and salads. Baby carrots and organically labeled carrot products are not allowed for import.

Import Requirements. The Department of Agriculture and Fisheries restricts certain vegetable items for import and subjects others to inspection. The following vegetables are prohibited from entry:

- Carrots, raw or untreated
- Citrus plants
- Corn, maize, etc. except loose grain
- Potatoes, from the EU, Northern Ireland, Newfoundland, New York (including Long Island), St. Pierre, and Miquelon
- Sweet potatoes

The following products require an import permit from the Department of Agriculture and Fisheries and are subject to inspection on arrival:

- Coconuts, other than husked nuts
- Live plants
- Potatoes, seed
- Yams (inspection only)

In addition to the products mentioned here, the Department of Agriculture maintains an embargo list that changes frequently.

For information on current import bans, contact the Department of Agriculture and Fisheries at 441-292-4611.

Tariffs and Duties. In Bermuda, fresh vegetables are subject to a 5 percent tariff. In addition, all imported goods are also assessed a "wharfage tax," consisting of a charge of 1.01 percent on the c.i.f value of the shipment for use of the dock or airport of entry. There are no VAT or stamp taxes for goods imported into Bermuda.