Required Report: Required - Public Distribution

Date: July 03, 2025

Report Number: C12025-0002

Report Name: Exporter Guide Annual

Country: Caribbean Basin

Post: Miami ATO

Report Category: Exporter Guide

Prepared By: Karina Pimentel

Approved By: Katherine Woody

Report Highlights:

The Caribbean Basin region continues to experience growth, driven primarily by the steady rise in tourism, which in turn impacts consumer demand. In 2024, U.S. agricultural exports of consumer-oriented products to the region reached $1.64 billion, a 6 percent gain when compared with 2023. U.S. exporters seeking to expand into new markets will find opportunities in the region due to its relative economic stability and growing demand for a diverse range of food and beverage products.

FAS Exporter Guide

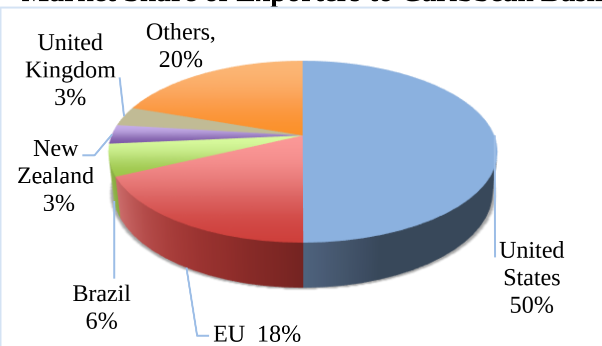
Executive Summary

The Caribbean is an excellent market for U.S. suppliers. Proximity, close commercial ties with the United States, a large influx of tourists, and a relatively trade-friendly regulatory environment all contribute to the attractiveness of this market.

Consumer-Oriented Agricultural Imports

A large majority of foods must be imported in the Caribbean Basin, as domestic production is limited. Imports of consumer-oriented agricultural products totaled $3.29 billion in 2024, with the United States capturing 50 percent of the market.

Market Share of Exporters to Caribbean Basin



Food Retail Industry

Total food retail sales (excluding sales tax) were estimated at $10.48 billion in 2024. Approximately 81 percent of imported foods and beverages are channeled through the retail sector, which includes traditional grocery stores as well as modern, upscale supermarkets

Food Processing Industry

Due to limited agricultural production, food processing is minimal in most countries, with Trinidad and Tobago, Barbados, and Guyana being notable exceptions. The sector is valued at an estimated $148 million.

Food Service Industry

Tourism is a key factor generating demand for U.S. products in the food service sector. Sales reached $2.28 billion in 2024, an increase of 4 percent from the previous year, supported by the opening of new hotels and restaurants that are paving the way for future market opportunities for U.S. exporters.

2024 Quick Facts

Imports of Consumer-Oriented Products

U.S. $3.29 billion

Top 10 Growth Products

1.Poultry Products	6. Prepared Foods
2. Bakery, Cereal, Pasta	7. Fresh Fruits
3. Beef Products	8. Fresh Vegetables
4. Dairy Products	9. Eggs & Products
5. Non-Alcoholic Bev	10. Pork Products

Food Industry by Channels

Retail Food Industry	$10.48 billion
Food Service-HRI	$2.28 billion
Food Processing Ingredients	$2.48 billion
Food and Agriculture Export	$813 million

Top 10 Retailers

Massy Stores, EcoMax, Leader Price, Super Value, Carrefour, Market Place, Rite Way Food Market, Graceway Supermarket, Price Smart, and Tru Valu Supermarket

GDP/Population

Population*:* 4.96 million

GDP: Ranges from $658 million (Dominica) to $28.14 billion (Trinidad and Tobago)

GDP per capita: Bermuda $118,774; Guyana $84,140; Aruba $54,720; Trinidad and Tobago $32,680; Dominica $15,280

Sources: Trade Data Monitor, Euromonitor, International Monetary Fund, World Bank

Strenghts	*Weaknesses*
The United States holds a logistical advantage, with extensive shipping and consolidation options through of South Florida ports.	Extreme weather risks can impact tourism and the region’s economy.
Opportunities	***Threats***
Growing tourism, including from the Untied States, drives increased demand for imported food and beverage products from trusted American suppliers.	Supply chain disruptions and higher prices from U.S. suppliers may lead some importers to source imports from other regions.

Section I: Market Overview

For purposes of this report, the terms "Caribbean" and "Caribbean Basin" refer to the 25 markets[1] covered by the Caribbean Basin Agricultural Trade Office (CBATO), with the exception of Cuba (see full list at the bottom of section). The Caribbean Basin is a large and highly fragmented region of the Americas. It is a mix of independent states, overseas departments or dependencies of European countries, and islands that are part of a European kingdom. The region has 4.96 million inhabitants, of which two-thirds are concentrated in five markets: Trinidad and Tobago, Guyana, Guadeloupe, Martinique, and The Bahamas. The population is incredibly diverse and comprises descendants from native tribes that inhabited the region and people of African, European, Indian, and Middle Eastern descent, among others. The Caribbean's multicultural culinary influence from Europe, India, Africa, and the Americas creates a diverse cuisine. The region boasts a variety of food options that cater to different tastes and preferences, from comfort food like fried chicken to fusion dishes that blend international flavors. The cultural diversity, along with a vibrant tourism sector and expatriate communities, is driving demand for high-quality foods and culinary experiences. Consequently, the Caribbean is gaining recognition as a significant gastronomy market around the world, with consumers being exposed to international food festivals and cuisine inspired by world trends.

The region's economy generally relies on foreign investment to support development, particularly in industries like energy, infrastructure, and agriculture. With approximately 9 million stopover tourists and more than 18.6 million cruise ship passengers visiting the region in 2024, tourism is the main economic driver for most Caribbean markets. Real GDP growth of tourism-dependent Caribbean countries increased by 4.17 percent in 2024. Trinidad and Tobago and Guyana are the main exceptions, as their economies are largely based on oil and gas production. According to the IMF, in 2024 Guyana's GDP grew by 43.8 percent in real terms, marking the sixth consecutive year of growth above 20 percent largely due to the country’s expanding oil industry. The development of the oil and gas sector has created new job opportunities, increased government revenue, and increased infrastructure investments, with an estimated 15 new hotels in various stages of development.

ADVANTAGES	CHALLENGES
Growth in the number of stopover tourists leads to increased demand for food and beverage products in many markets.	Caribbean nations largely rely on foreign investment, which impacts the region’s economic growth.
Increased U.S. tourism in the region drives demand for high-quality U.S. products.	Vulnerability to natural disasters like hurricanes can severely affect tourism in some markets.
Well-established private family businesses foster long-term relationships with suppliers.	Limited access to foreign exchange affects trade in countries such as Trinidad and Tobago.
A robust array of consolidated shipping services catering to smaller markets in the Caribbean Basin region allow small- and medium-sized U.S. suppliers to test the trade waters before scaling up production.	The region is fragmented into small markets, which limits connectivity and inter-island cargo. The outdated port infrastructure in some markets can pose logistical challenges, resulting in high shipping and freight costs.
Many U.S. food and beverage companies are responding to the growing demand for healthier products.	Some Caribbean markets with strong European ties are considering adoption of EU regulatory standards that could affect product labeling and packaging.

[1]The CBATO's region of coverage consists of the following 25 markets: Anguilla, Antigua and Barbuda, Aruba, The Bahamas, Barbados, Bermuda, British Virgin Islands (BVI), Caribbean Netherlands or BES Islands (Bonaire, Sint Eustatius and Saba), Cayman Islands, Curaçao, Dominica, Grenada, Guadeloupe, Guyana, Martinique, Montserrat, Saint Barthélemy, Saint Kitts and Nevis, Saint Lucia, Saint Martin, Saint Vincent and the Grenadines, Sint Maarten, Trinidad and Tobago, and Turks and Caicos Islands.

Section II: Exporter Business Tips

U.S. suppliers interested in exporting to the Caribbean Basin are advised to first research potential markets, weighing the advantages and disadvantages of using an importer/wholesaler versus selling directly to customers. Exporters who can travel to region periodically to meet directly with customers may be able to make sales to multiple retail and food service businesses in various markets, while other suppliers may find it easier to work with importers/distributors in targeted markets. The latter is often the easiest method to begin exporting to the region, with some distributors serving multiple markets from a central location or multiple warehouses in the Caribbean.

Local Business Customs and Trends: In general, Caribbean buyers rely heavily on consolidators, particularly those based in South Florida, to ship mixed container loads to their local ports. A crucial first step of doing business with importers in many Caribbean markets is building relationships with consolidators in South Florida (or New York/New Jersey for those seeking to export to Bermuda). Many large resorts and supermarket chains tend to order larger quantities directly from suppliers, but the primary resource for small- and medium-sized U.S. suppliers are local wholesale importers/distributors who work with prospective U.S. suppliers to meet local standards and regulations and find the best distribution channels. They are also more likely to stay informed of changing regulations and duties on food and beverage products in their markets.

A good way to meet with Caribbean importers is to attend food and beverage trade shows in the United States. Among the shows with a strong presence of Caribbean importers are the National Restaurant Association (NRA) Show in Chicago, the Summer Fancy Food Show in New York City, and the Americas Food and Beverage (AFB) Show in Miami. The CBATO and its partner organizations (e.g., Southern United States Trade Association, Food Export Midwest, Food Export Northeast, U.S. Meat Export Federation, and the USA Poultry and Egg Export Council, among others) often lead delegations of Caribbean buyers to these and other trade shows and buying missions. Please contact the CBATO (see Section VI) to connect with Caribbean buyers attending these U.S. trade events.

General Consumer Tastes and Trends: U.S. brands are well-recognized and in high demand in the Caribbean. Exposure to U.S. food and culture through television, travel, and U.S. food franchises in the region greatly influences local preferences. The U.S. reputation for quality and food innovation, as well as the popularity of American cuisine, drive demand for U.S. food exports to the region. Caribbean consumers, especially younger generations, use social media to follow the latest consumer trends in the United States and worldwide. Price remains a predominant factor in purchasing decisions, but new flavors, specialty ingredients, and certain attributes such as organic, gluten-free, low sugar, and low fat, can motivate consumers to pay a premium price, especially in higher income markets. In particular, regional concerns about obesity and diabetes fuel interest in healthy products. According to research conducted by the University of the West Indies, one in three Caribbean children are overweight or obese. In response, the Healthy Caribbean Coalition supports national efforts to prevent and control childhood obesity, including programs that promote healthy eating and prescribed nutritional guidelines for school children's programs.

Section III: Import Food Standards, Regulations and Procedures

By and large, the regulatory environment in the Caribbean Basin is quite import-friendly. Practically all markets accept standard U.S. food labels. Exports of most U.S. foodstuffs do not require sanitary product registration, laboratory testing, special certification (outside of normal export certificates), or pre-market approval. Most Caribbean markets regulate the importation of food and agricultural products based on their local laws and regulations. However, the French Overseas Departments of Guadeloupe and Martinique and the French Collectivity of Saint Martin follow French and EU regulations.

Customs Clearance: U.S. suppliers that work closely with their Caribbean buyers to ensure compliance with all local laws and regulations will find the import clearance process is fairly straightforward and non-restrictive. As part of their WTO trade facilitation commitments, many Caribbean markets have implemented or are in the process of implementing a single electronic window as a one-stop online interface between government and business to streamline trade processes.

Documents Generally Required for Imported Food: The following reports contain more information on documentation requirements in the largest CBATO markets: The Bahamas Export Certificate Report 2020, Bermuda Export Certificate Report 2021, Barbados Export Certificate Report 2022, Guyana Export Certificate Report 2023, Trinidad and Tobago Export Certificate Report 2024. Although documentation requirements may vary by market, the following documents are generally required:

1. Commercial Invoice
2. Bill of Lading or Air Waybill
3. Health Certificate (for meat and poultry products)
4. Phytosanitary Certificate (for plant and plant products)
5. Zoosanitary Certificate (for animal products)
6. Certificate of Free Sale (for processed food and beverage products)
7. Certificate of Analysis (for processed food and beverage products) may be required in some markets

Country Language Labeling Requirements: English is acceptable on food labels in the most of the Caribbean, with the exception of Guadeloupe, Martinique, and French Saint Martin, which require products to be labelled in French,

Tariffs and Free Trade Agreements: The 15 Member States of the Caribbean Community (CARICOM) apply a Common External Tariff (CET) for extra-regional imports. All other Caribbean markets, with the exception of Sint Maarten, which is a duty-free country, have their own duty schedule. Intra-regional trade amongst CARICOM members is duty-free. Individual Caribbean countries may also be a signatory of bilateral trade agreements, such as the Guyana-China Trade Agreement and the Guyana-Brazil Partial Scope Agreement. CARICOM is also party to the following trade agreements:

- The CARICOM-Venezuela Trade and Investment Agreement
- The CARICOM-Colombia Trade, Economic and Technical Cooperation Agreement

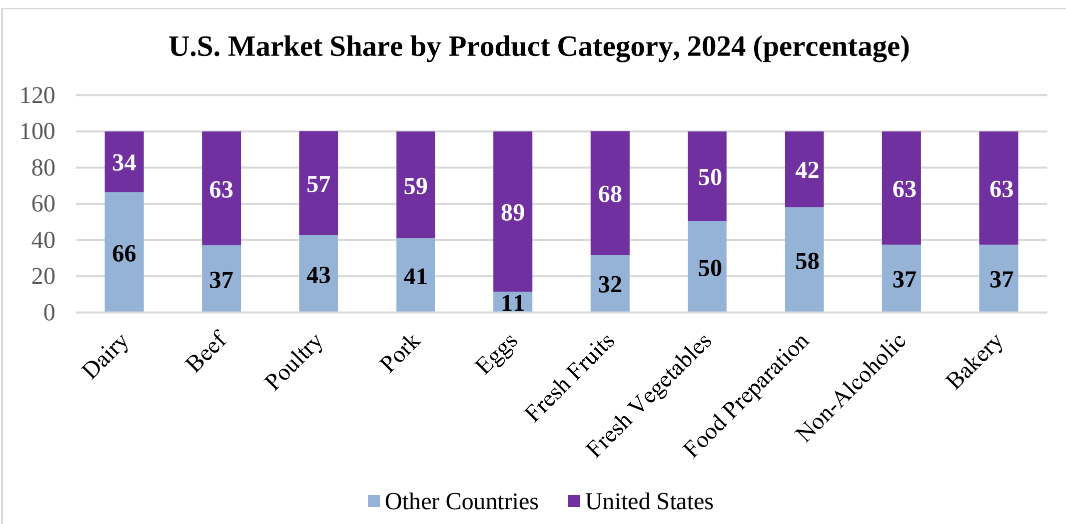
- The CARICOM-Dominican Republic Free Trade Agreement
- The CARICOM-Cuba Trade and Economic Cooperation Agreement
- The CARICOM-Costa Rica Free Trade Agreement
- The CARIFORUM[2] EU Economic Partnership Agreement
- The CARIFORUM[2] UK Economic Partnership Agreement

[2]The Caribbean Forum (CARIFORUM) of the Organization of African, Caribbean and Pacific States (OACPS) includes: Antigua and Barbuda, Barbados, Belize, The Bahamas, Dominica, The Dominican Republic, Grenada, Guyana, Jamaica, Saint Kitts and Nevis, Saint Lucia, Saint Vincent and the Grenadines, Suriname, and Trinidad and Tobago.

Trademarks and Patents Market Research: Most Caribbean markets have a framework for intellectual property (IP) protection and are parties to international IP treaties and agreements. The following reports contain more information on protection of IP in the largest CBATO markets: The Bahamas FAIRS Country Report 2020, Bermuda FAIRS Country Report 2021, Barbados FAIRS Country Report 2022, Guyana FAIRS Country Report 2023, Trinidad and Tobago FAIRS Country Report 2024.

Section IV: Market Sector Structure and Trends

The top 10 import categories for the Caribbean Basin are poultry and poultry products; bakery, cereal, and pasta goods; beef and beef products; dairy products; non-alcoholic beverages excluding juice; food preparations; fresh fruits; fresh vegetables; eggs and egg products; and pork and pork products. These 10 categories represent approximately 70 percent of all consumer-oriented product imports in the Caribbean Basin. The United States has the leading supplier in most product categories, except dairy.



Retail Sector: An estimated 81 percent of consumer-oriented agricultural imports in the Caribbean are destined for the retail sector. Most of the products stocked on the shelves of Caribbean retail stores are imported. The retail food sector is heterogeneous and dynamic, composed of grocery outlets (hypermarkets, supermarkets, convenience stores, discounters, and gas stations) and small, traditional grocery operations. In select markets, upscale grocers are emerging, characterized by their emphasis on high-quality products, grab-and-go meals, and selection of healthy options.

According to Euromonitor International, grocery retail sales in the CBATO region totaled an estimated $10.48 billion in 2024, marking a 2 percent increase compared to 2023. The number of retail outlets in the region continued to decline in 2024, from 16,237 to 15,809, as modern retail formats, including supermarkets, convenience stores, and mini markets, gained market share.

Caribbean[1] Grocery Retailers by Type, 2024

Type	Number of Outlets	Sales (Million $)
Convenience Retailers	1,314	859
Supermarkets	597	3,931
Hypermarkets	45	1,505
Discounters	202	1,157
Warehouse Clubs	3	287
Food & Drink Specialists	4,885	1,211
Small Local Grocers	8,763	1,530
TOTAL	**15,809**	**10,480**

[1] Excludes Turks and Caicos, St. Martin, St. Barts, and BES Islands
Source: Euromonitor International

Some of the largest regional chains include Massy Stores, Price Smart, and Cost-U-Less. Local chains include Ecomax (Guadeloupe), Leader Price (Martinique), Super Value (Bahamas), Graceway (Turks and Caicos), The Market Place (Bermuda), RiteWay (British Virgin Islands), and Van den Tweel Supermarket (Curacao). International chains with outlets in the region include Carrefour and Le Petit Casino from France. Retail chains are capturing more market share as they typically offer better prices and assortment. However, 'mom and pop' stores continue to supply a large share of consumers, particularly in areas underserved by large retailers. Additional information can be found in the CBATO's Caribbean Basin: Retail Food Annual report.

Food Service Sector: The Caribbean hotel, restaurant, and institutional (HRI) food service sector is estimated to account for roughly 19 percent of consumer-oriented agricultural imports. According to Euromonitor International, the industry is made up of more than 7,000 outlets, and restaurants (both full-service and limited-service) account for 86 percent of sales. With only 12 percent of all outlets, limited-service restaurants (mainly fast-food chains) account for 54 percent of the sector's total sales, estimated at $2.28 billion in 2024. The industry is expected to continue growing as tourism expands. Additional information can be found in the CBATO's Caribbean Basin: Food Service Hotel Restaurant Institutional Annual report.

The percentage of Caribbean hotels and restaurants that are independently owned varies from approximately 80 percent in Grenada to 5 percent in Saint Lucia. This characteristic influences the flow of imports to each market, as independently owned outlets are likely to source food and beverage products from local wholesale importers/distributors. Larger chain restaurants and hotels possess both the connections and economies of scale necessary to import directly from U.S. suppliers. The Bahamas, Barbados, and Curacao are some of the markets with the highest concentration of chain food service outlets in the region. While corporate-owned resorts and hotels continue to expand in the region, with notable examples including Marriott Hotels with 20 locations, Hilton Hotels with 12 locations, and Sandals with 10 locations, independently owned boutique hotels are also thriving, offering luxury beachfront, eco-friendly properties, and wellness-focused accommodations.

Caribbean[1] Food Service Operators by Type, 2024

Type	Number of Outlets	Sales (Million $)
Cafes & Bars	890	207.5
Full-Service Restaurants	2,998	742.6
Limited-Service Restaurants	898	1,242
Street Stalls & Kiosks	2,461	92.9
TOTAL	**7,247**	**2,285**

[1] Excludes Turks and Caicos, St. Martin, St. Barts & BES Islands
Source: Euromonitor International

Locally owned, independent restaurants are particularly popular in countries such as Aruba, Guadeloupe, Martinque, Saint Lucia, and The Bahamas. As some markets in the Caribbean Basin still have European ties, many chefs of European origin or those trained in European cuisine often prefer to use European products. This can make it challenging and time-consuming to encourage them to incorporate U.S. ingredients. In addition, many local advocate chefs are using locally sourced ingredients to emphasize freshness, support the local economy, embrace seasonal availability, and preserve the authenticity of Caribbean cuisine, especially the private chefs that serve in high-end villa rentals, which is a growing lodging trend in luxury travel markets. However, celebrity chefs with notable achievements (such as the Taste of the Caribbean Chef of the Year) are working in restaurants across the region, while other well-known chefs from around the world are often invited to participate in local food festivals such as the Nassau Paradise Island Wine and Food Festival. These chefs often influence decision-making buyers and can serve as a valuable conduit to introduce U.S. food and beverage products, as well as showcase culinary innovations and modern fusion cuisine to international audiences.

Food Processing Sector: Food processing in the Caribbean Basin is primarily concentrated in Trinidad and Tobago, Barbados, and Guyana. The region relies heavily on imports, and the United States is the largest supplier of food ingredients. In 2024, bulk and intermediate agricultural products accounted for only 20 percent of U.S. agricultural exports to the CBATO region. Trinidad and Tobago and Barbados also produce wheat flour, pasta, bakery, soy, and dairy products, as well as animal feed. Guyana is more focused on agricultural processing and consumer-oriented products. Additional information can be found in the CBATO's Caribbean Basin: Food Processing Ingredients Annual report.

Section V: Agricultural and Food Imports

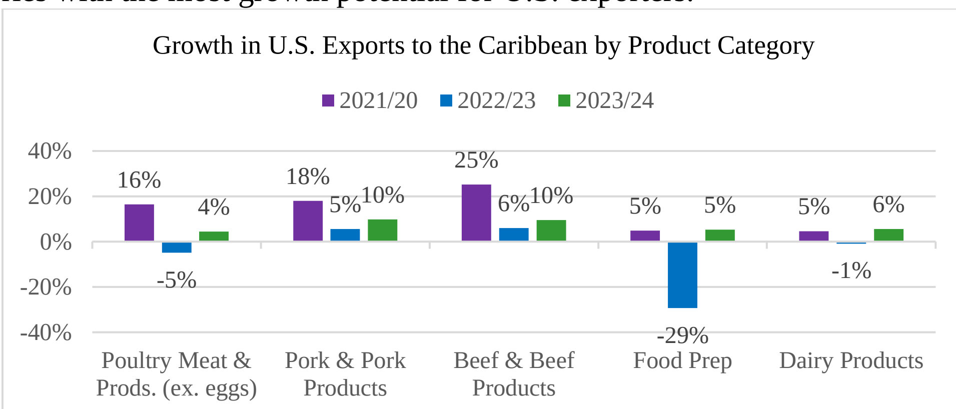
The Caribbean Basin presents export opportunities in a wide array of product categories. The table below lists sectors experiencing the highest growth rates over the past 5 years, with highlighted subcategories that present significant market potential for U.S. exporters.

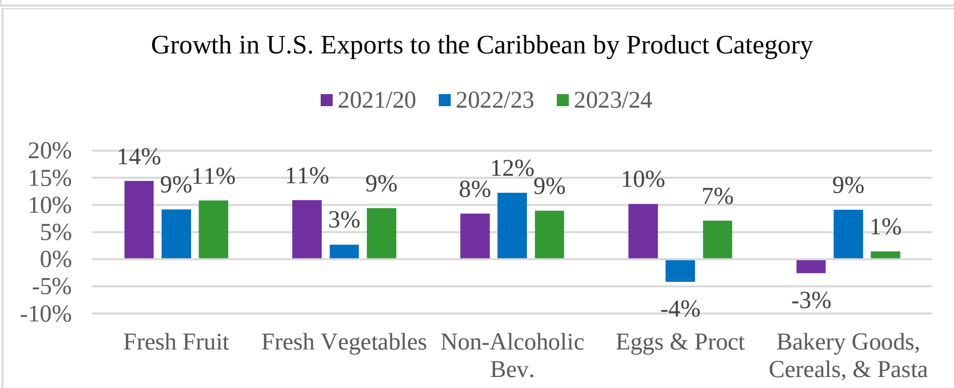
Product Category	Average Annual Growth[1/] 2019/2024	Product Subcategories
Eggs and Egg Products	24.72%	Birds' eggs, not in shell, dried, whether or not sweetened Birds' eggs, in shell, preserved or cooked
Fresh Fruits	5.44%	Apricots, fresh Citrus fruit, including kumquats, citrons and bergamots, fresh or dried Clementines
Non-Alcoholic Beverages	4.74%	Waters other than mineral or aerated, not sweetened or flavored Juice of any single fruit or vegetable (except orange juice), fortified with vitamins or minerals, in non-concentrated form
Beef and Beef Products	4.00%	Offal of bovine animals, edible, fresh or chilled Livers of bovine animals, edible, frozen
Pork and Pork Products	3.28%	Meat, meat offal or mixtures of swine, prepared or preserved Carcasses and half-carcasses of swine, frozen

1/- Based on volume
Source: Trade Data Monitor

Agricultural and Food Import Statistics: In 2024, the region imported over $4 billion in agricultural products from around the world, an increase of 4 percent from 2023. The top 10 markets in the CBATO region for U.S. agricultural products are The Bahamas, Trinidad and Tobago, Cayman Islands, Aruba, Barbados, Guyana, Bermuda, Turks and Caicos Islands, Sint Maarten, and Curacao. Together, these markets account for over two-thirds of all food imports in the region. The U.S. share of food and beverage imports is highest in markets such as Turks and Caicos (86 percent), Cayman Islands (82 percent), and The Bahamas (76 percent). Given limited domestic agricultural production and food processing, consumer-oriented foods account for 83 percent of total agricultural products. The remainder of imports is comprised of intermediate or semi-processed products (9 percent) and bulk commodities (8 percent). Please see the Annex of this report for more detail on U.S. exports of agricultural products to the Caribbean (2020-2024).

Best High-Value, Consumer-Oriented Product Prospects: Consumer-oriented products with high potential include poultry and poultry products; bakery, cereal, and pasta goods; beef and beef products; dairy products; non-alcoholic beverages excluding juice; food preparations; fresh fruits; fresh vegetables; eggs and egg products; and pork and pork products. The following charts illustrate some product categories with the most growth potential for U.S. exporters.





Section VI: Key Contacts and Further Information

If you have questions or comments regarding this report, or need assistance exporting to the Caribbean Basin region, please contact the CBATO in Miami, Florida. Caribbean importer listings are available from the CBATO for use by U.S. exporters of American food and beverage products.

Caribbean Basin Agricultural Trade Office (CBATO) Foreign Agricultural Service United States Department of Agriculture 909 SE 1st Ave, Suite 720 Miami, Florida 33131	Phone: (305) 536-5300 Email: atocaribbeanbasin@usda.gov Website: http://www.fas.usda.gov

Appendix

2020-2024 U.S. Exports of Agricultural Products to the Caribbean (Value in USD Thousands)

	2020	2021	2022	2023	2024
Bulk Agricultural Total	141,712	155,741	188,926	168,777	157,906
Intermediate Agricultural Total	145,202	176,051	205,382	184,966	178,441
Consumer Oriented Agricultural Total	1,024,048	1,168,713	1,523,807	1,545,139	1,643,587
Poultry Meat & Prods. (ex. eggs)	111,307	133,236	174,495	166,322	174,024
Bakery Goods, Cereals, & Pasta	110,527	107,730	131,590	144,785	146,941
Beef & Beef Products	71,821	96,086	119,291	126,955	140,292
Dairy Products	97,231	101,926	127,601	126,467	133,862
Non-Alcoholic Bev.	64,695	70,633	89,445	101,948	111,978
Soup & Other Food Preparations	84,935	89,217	125,131	96,726	102,190
Fresh Fruit	55,117	64,397	78,148	86,042	96,476
Fresh Vegetables	42,161	47,316	73,141	75,177	82,963
Eggs & Products	44,857	49,941	77,794	74,694	80,423
Pork & Pork Products	44,553	54,334	64,752	68,520	75,951
Condiments & Sauces	36,096	40,585	52,321	60,263	63,807
Distilled Spirits	21,063	27,295	43,237	49,825	50,591
Processed Vegetables	32,323	34,898	45,956	44,384	50,467
Meat Products NESOI	31,678	31,891	41,480	46,000	46,912
Wine & Related Products	22,989	38,093	51,250	40,715	37,223
Dog & Cat Food	32,563	33,650	44,050	39,343	36,864
Fruit & Vegetable Juices	25,121	25,018	37,636	33,719	34,894
Chocolate & Cocoa Products	15,033	16,774	22,123	29,853	30,125
Nursery Products & Cut Flowers	11,979	19,366	20,596	22,671	25,513
Beer	12,475	18,888	25,751	19,791	22,646
Processed Fruit	14,949	17,112	20,044	20,566	22,278
Mfg. Tobacco	3,791	5,598	5,691	13,424	19,130
Coffee, Roasted and Extracts	6,999	8,685	13,565	15,514	16,138
Chewing Gum & Candy	7,608	9,711	10,823	13,475	14,760
Tree Nuts	13,931	16,349	16,767	13,937	14,533
Spices	5,152	6,949	7,842	9,398	9,804
Tea	3,094	3,039	3,287	4,626	2,801
Total Agricultural Products	1,310,962	1,500,505	1,918,116	1,898,881	1,979,935

Source: US Census Bureau Trade Data

Attachments:

No Attachments