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Report Highlights:

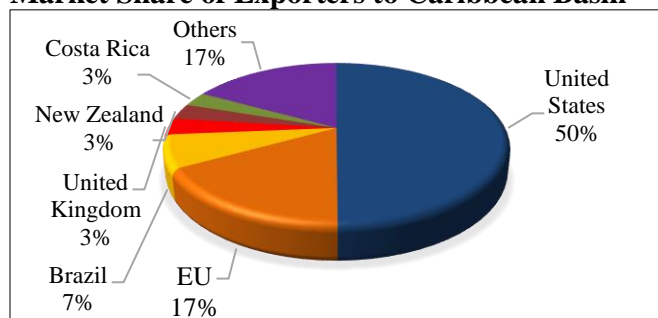
This report highlights the Caribbean Basin's food processing industry, its drivers, key players, and market landscape. Due to limited agricultural production, the region relies heavily on imports, and the United States is the largest supplier of food ingredients. Food manufacturing is primarily concentrated in Trinidad and Tobago, Barbados, and Guyana. The region's leading food and beverage manufacturers are seeking to expand production and increase exports of their products to new markets, creating opportunities for U.S. ingredients especially in the categories of bakery and confectionary goods, non-alcoholic beverages, and healthy food products.

Caribbean Basin Market Fact Sheet

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 \$4.06 billion in 2025, 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 \$10.89 billion in 2025. Approximately 82 percent of imported foods and beverages are channeled through the retail sector, which includes traditional grocery stores as well as modern, upscale supermarkets and convenience stores.

Food Processing Industry: Due to economies of scale, food production remains relatively small compared to other regions. The largest food and beverage manufacturing country is Trinidad and Tobago with an estimated value of \$470 million according to the latest statistics. Guyana and Barbados also have modest food processing sectors.

Food Service Industry: Tourism is a key factor generating demand for U.S. products in the food service sector. Sales reached \$2.4 billion in 2025, including cafes/bars, full-service restaurants, limited-service restaurants, and street stalls/kiosks.

2025 Quick Facts

Imports of Consumer-Oriented Products

\$4.06 billion

Top 10 Growth Products

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

Food Industry by Channels

Retail Food Industry	\$10.89 billion
Food Service-HRI	\$2.4 billion
Food Processing Ingredients	Not available
Food and Agriculture Exports	\$813 million

Top Retailers

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

GDP/Population

Population: 5 million

GDP: Ranges from \$688 million (Dominica) to \$25.63 billion (Trinidad and Tobago)

GDP per capita ranges: Bermuda \$142,855; Cayman Islands \$99,143; Bahamas \$39,455; Guyana \$29,675; Trinidad and Tobago \$18,733; Dominica \$10,405

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

<i>Strengths</i>	<i>Weaknesses</i>
Companies are currently sourcing a significant portion of their ingredients from the United States, valuing the quality.	In response to limited consumer purchasing power, food processors are seeking ingredients at competitive prices.
<i>Opportunities</i>	<i>Threats</i>
Food processors are looking to expand their operations and diversify by working with new suppliers.	Supply chain disruptions and higher prices from U.S. suppliers could lead some importers to source from other regions.

Section 1: Market Summary

For purposes of this report, the terms "Caribbean" and "Caribbean Basin" refer to the 25 markets covered by the Caribbean Basin Agricultural Trade Office (CBATO), with the exception of Cuba¹. The Caribbean Basin region includes a mix of independent states, overseas departments or dependencies of European countries, and islands that are part of a European kingdom. The region has a fragmented island geography and a year-round population of less than 5 million, of which two-thirds are concentrated in five markets: Trinidad and Tobago, Guyana, Guadeloupe, Martinique, and The Bahamas. However, with roughly 9.8 million stopover tourists and more than 20 million cruise ship passengers visiting the region last year, the demand for food products is considerable.

The International Monetary Fund (IMF) estimates that the Eastern Caribbean saw economic growth of 3 percent last year, supported by a strong influx of tourists and ongoing infrastructure investments. Tourism is the main economic driver for most Caribbean markets. Real GDP growth of tourism-dependent Caribbean countries increased by 2.3 percent in 2025. The region's non-tourism economy generally relies on foreign investment to support development, particularly in industries such as energy, infrastructure, and agriculture. However, the extent of dependence on foreign investment can differ among Caribbean countries. According to the World Bank, Gross Domestic Product (GDP) of markets in the Caribbean Basin region ranges from \$688 million in Dominica to \$25.63 billion in Trinidad and Tobago, and GDP per capita ranges from \$10,400 in Dominica to more than \$142,000 in Bermuda.

The economies of Trinidad and Tobago and Guyana are largely based on oil and gas production. Guyana, which experienced exceptional economic growth of more than 20 percent, has seen the pace of economic expansion moderating, constrained by a limited labor supply and planned projects that will require additional foreign workers. Trinidad and Tobago has the largest population among Caribbean Basin markets, with more than 1.3 million residents. The country's economic outlook is optimistic, driven by expectations of renewed oil and gas activity that could boost economic growth. According to the Trinidad and Tobago Ministry of Trade and Industry (MTI), numerous initiatives have been introduced to help foster manufacturing growth across the islands. Trinidad and Tobago is also the largest food and beverages manufacturer in the Caribbean Basin. The country's food manufacturing industry is well-developed, supported by established infrastructure, and benefits from relatively low energy costs. Barbados and Guyana also each have an array of food and beverage manufacturers.

¹The 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, Cuba, 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.

Advantages for U.S. Exporters	Challenges for U.S. Exporters
Food and beverage consumption by residents and tourists have risen in recent years, increasing demand for food and beverage manufacturing in the region.	Caribbean nations rely significantly on foreign investment, which impacts the region's economic growth.
Since most of the raw and sourcing materials used in the production process are imported, companies seek reliable suppliers to ensure consistent stock levels and quality at the best price.	Many buyers prefer frequent purchases of smaller quantities and consolidated shipments, which can be difficult for some U.S. suppliers to accommodate
Food manufacturers in the region are targeting export growth, which can help improve access to foreign exchange. Intra-regional trade is growing, with some manufacturers operating plants in multiple Caribbean markets.	Limited access to foreign exchange in Trinidad and Tobago (the largest food and beverage manufacturer in the region) constrains the ability of some companies to import ingredients.
The region boasts many well-established privately owned businesses looking to foster long-term relationships with dependable suppliers.	The region is fragmented into small markets, which limits connectivity and inter-island cargo.
Emphasis on developing the food production sector to support food security goals leads to greater demand for imported ingredients that cannot be locally produced.	Many markets with European ties are considering EU-style trade rules that could restrict imports of certain food ingredients like flavorings and color dyes.

Section 2: Roadmap for Market Entry

Entry Strategy

Trinidad and Tobago, Barbados, and Guyana represent the region's largest food and beverage manufacturing markets. The region aims to boost food production by promoting the development of the industry with organizations such as the Guyana Manufacturing and Services Association (GMSA), Trinidad and Tobago Manufacturers Association (TTMA), and Barbados Manufacturing Association (BMA). These groups support small- and medium-sized enterprises to build the food processing capacity, develop a skilled manufacturing workforce, and help promote exports of locally manufactured foods to other markets in the region. Most manufacturers maintain their own warehouses and distribution operations for local customers. Many larger companies utilize highly automated equipment and are investing in expanded facilities to increase production capacity. Some of these companies are conglomerates overseeing a diverse portfolio of enterprises, from import and distribution to manufacturing to retail outlets.

The most effective way to connect with buyers in the Caribbean is through face-to-face meetings. However, the region is so fragmented that travel options to the markets can make these meetings expensive. Caribbean buyers often establish direct connections with U.S. companies participating in trade shows. Some U.S. trade associations also offer reverse trade missions and training opportunities for Caribbean companies, providing excellent opportunities for suppliers to meet with foreign buyers.

Contact the FAS Caribbean Basin Agricultural Trade Office (CBATO) for more information on Caribbean buying missions and lists of Caribbean food processors. Contact information is provided in Section 5 of this report.

Import Procedures

Most Caribbean countries follow international standards (e.g., Codex Alimentarius) and fully accept U.S. standards for food and agricultural products, including the standard U.S. nutrition facts panel. However, the EU's Food Information to Consumers Regulation may apply to some EU Member State territories in the Caribbean. In most Caribbean countries, food safety responsibilities fall under the Ministry of Public Health or its equivalent. The Ministry of Agriculture may also play a role in plant and animal products regarding both public and plant and animal health. More information on Caribbean Basin import requirements can be found in the CBATO's Food and Agricultural Import Regulations and Standards (FAIRS) reports available via the USDA Foreign Agricultural Service's [Global Agriculture Information Network \(GAIN\)](#) for the following countries: The Bahamas, Barbados, Bermuda, Guyana, and Trinidad and Tobago. Links to the most recent reports are also provided in Section 5 of this report.

The [Caribbean Community \(CARICOM\)](#) is a regional organization established to promote economic integration, foreign policy coordination, and functional cooperation among 15 member states² and five associate members in the Caribbean. CARICOM members can typically trade amongst themselves duty-free but apply a [common external tariff](#) on products sourced outside of the trade bloc. However, CARICOM allows member states to import food ingredients meant for further processing on a duty-free basis when not available from other CARICOM members. Specific regional trade and customs rules apply. Key regulatory principles and provisions include:

- [CARICOM's Common External Tariff \(CET\) exemptions \(Lists A/D\)](#)
- Treaty of Chaguaramas, [Article 83](#), which empowers CARICOM's Council for Trade and Economic Development (COTED) to reduce or suspend duties on goods where local production is insufficient or substandard (includes raw materials for further processing)
- Treaty of Chaguaramas, [Article 84](#), which permits duty-free intra-CARICOM treatment when imported ingredients are substantially transformed through processing
- National implementation rules, subject to proper documentation (and licensing in some cases) -- National governments often require companies to register their list of inputs that will be needed in the following year. This information is shared amongst CARICOM members to identify potential suppliers within the trade bloc before a license will be granted to import the goods duty-free from non-CARICOM members.

CARICOM's framework also includes an explicit special provision to address the issue of a CARICOM Less Developed Member Country (LDC) suffering a loss of revenue as a result of the duty-free importation of goods by another CARICOM member. In such cases, COTED can impose temporary import duties on such goods. These LCD protections are specified in [Article 160](#) of the revised Treaty of Chaguaramas.

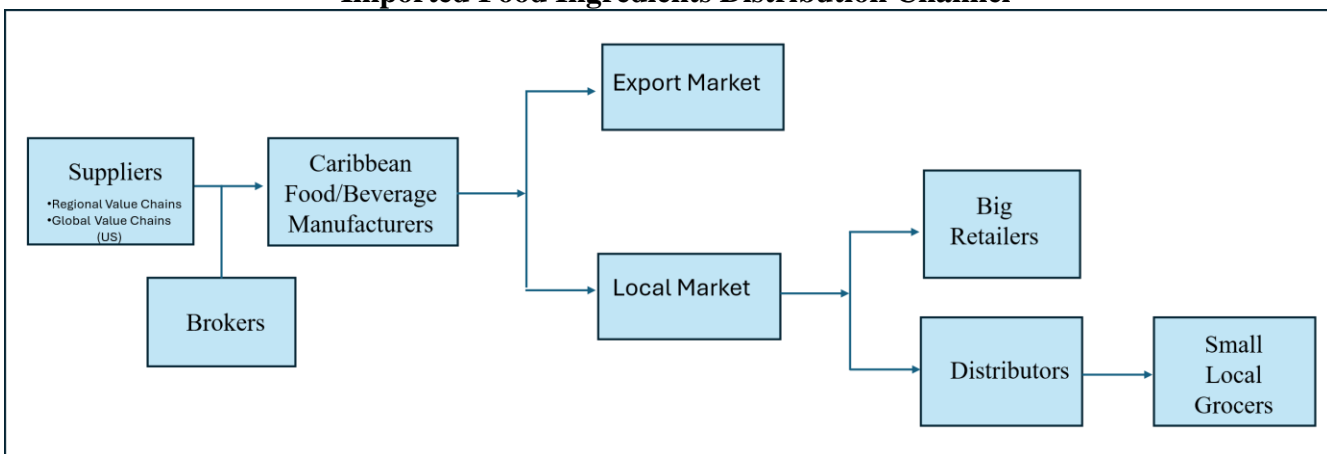
²Caricom Member States: Antigua and Barbuda, Bahamas, Barbados, Belize, Dominica, Grenada, Guyana, Haiti, Jamaica, Montserrat, Saint Kitts and Nevis, Saint Lucia, Saint Vincent and the Grenadines, Suriname, and Trinidad and Tobago

Distribution Channels

Larger Caribbean manufacturers generally source ingredients directly from overseas suppliers and handle their own importation of raw materials for use in their plants. However, in order to take advantage of the duty-free process described above, companies often begin the process by submitting to their national government a list of ingredients they anticipate needing to import in the following year. If these products are not available from producers in other CARICOM member states, the manufacturer may receive a license to import ingredients duty-free from outside of the CARICOM bloc.

The following flow chart shows how imported ingredients tend to enter the market and move through the Caribbean distribution system, especially in markets where products are manufactured.

Imported Food Ingredients Distribution Channel



Market Structure

South Florida, which has an abundance of food exporters, brokers, and consolidators, is the main gateway for U.S. products to the Caribbean Basin. Several shipping lines service the region from South Florida's three seaports (Port of Miami, Port Everglades, and Port of Palm Beach). Additionally, U.S. ingredient suppliers may be able to work with food brokers or consolidators to facilitate the sales and delivery process.

Major Segments in the Food Processing Industry

The Caribbean Basin food manufacturing sector is concentrated in the following segments:

- Bakery, Pasta, Crackers
- Processed Meats
- Dairy
- Snack Foods
- Candy and other Confectionary Products
- Sauces and Spice Blends
- Beverages: Non-Alcoholic and Alcoholic

Company Profiles & Products

COMPANY	MARKET	CATEGORIES	LINK
Acado Foods	Trinidad and Tobago, Barbados	Pasta, condiments, spreads, sauces, milk powder, ready-to-eat foods	https://acadofoods.com
Associated Brands Industries Limited	Trinidad and Tobago	Snack foods, cookies, crackers, cereals, chocolates and confectionary	https://abil-tt.com
Baron Foods	Saint Lucia	Sauces, condiments, beverage concentrates	https://www.baronfoodsltd.com
Edward Beharry Group & Company Limited	Guyana	Pasta, noodles, spices	https://beharrygroup.com/beharry_group/manufacturing
Great Foods	Trinidad and Tobago	Meat processor (sausages, ham, bacon, salami, deli meats)	https://greatfoodsltd.com
HIPAC Limited (Farmers Choice)	Barbados	Meat processor (hot dogs, canned meats, breaded frozen foods)	https://hipacfoods.com
R.H.S. Marketing Limited	Trinidad and Tobago	Sauces, condiments, seasonings, beverages, flavorings	https://www.karibbeanflavours.com
Roberts Manufacturer Co Limited	Barbados	Cooking oils, spreads, animal feed/pet food	https://rmco.com
SM Jaleel Limited	Trinidad and Tobago	Non-alcoholic beverages, soft drinks, fruit juices, energy and sports drinks	https://www.smjaleel.net
Sterling Products Limited	Guyana	Dairy products, ice cream, yogurt, edible fats and cooking products, beverages	https://sterlingguyana.com
Wibisco	Barbados	Crackers, cookies	https://wibisco.com

Sector Trends

Healthy and “Better for You” Products - Consumers in the Caribbean and around the world are becoming more informed about healthy eating due to public health campaigns and the influence of social media. In response, companies are introducing healthier product options that feature reduced or zero sugar, reduced fat content, lower sodium content, etc.

Savory and Seasoned Foods - The culinary influences from Europe, India, Africa, and the Americas have created a diverse cuisine and consumer palate in the region. In particular, the large Indian population in some markets like Trinidad and Tobago and Guyana has significantly influenced food preferences. Many dishes use unique blends of spices, peppers, and herbs, as well as various sauces and marinades. Some notable examples include nutmeg jelly, spicy pepper sauces and marinades, and unique ice cream flavors such as salted prune.

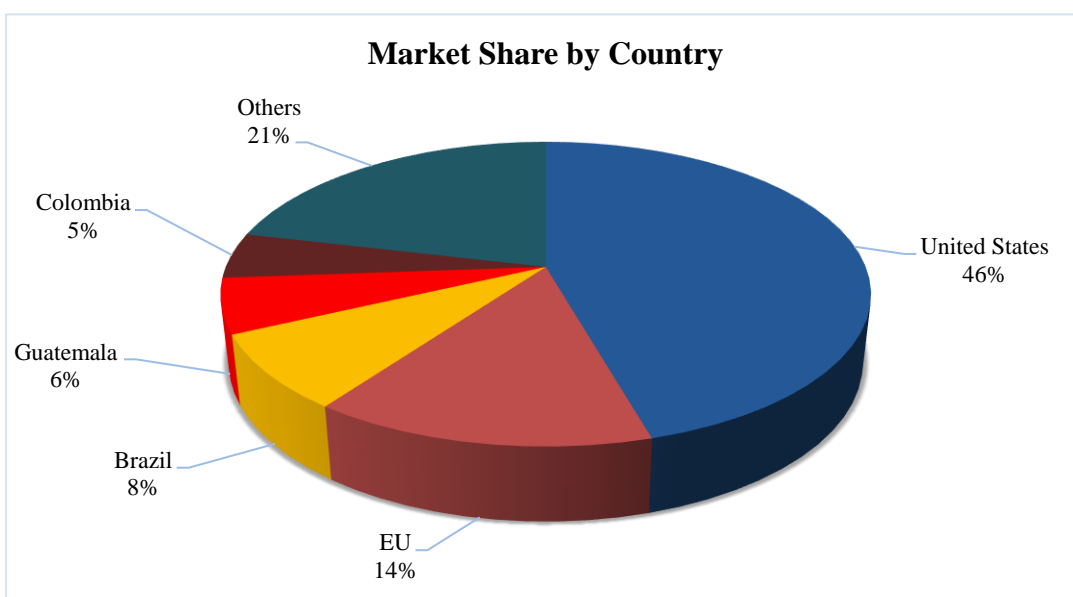
Tropical Flavors - Tropical fruits are widely cultivated in the Caribbean, and local consumers have developed a strong preference for these flavors. Even though food manufacturing companies follow global trends and conduct market research in the region, companies adapt products to local tastes. In some markets, you might see donuts glazed with guava, pineapple, or mango, banana-flavored sparkling drinks, and soursop syrups.

Convenience - As busy lifestyles become more common and more women enter the workforce, consumers are seeking convenient food and meal solutions, such as grab-and-go, ready-to-cook, ready-to-eat, and ready-to-heat options. To meet this demand, supermarket chains are expanding these offerings in their bakery and deli departments. Convenience stores are also broadening their selections in these categories.

Section 3: Competition

The United States accounts for 46 percent of imported food ingredients in the Caribbean Basin, totaling \$207.5 million in 2025. The largest competitor is the European Union (EU), with \$65.8 million in exports (14 percent), followed by Brazil with \$36.4 (8 percent), Guatemala with \$26.4 million (6 percent), Colombia with \$22 million (5 percent), and Malaysia with \$13.3 million (3 percent).

Top Exporters of Food Processing Ingredients to the Caribbean Basin



Data Source: Trade Data Monitor

Section 4: Best Product Prospects

The tables below show the top ingredients (by value) imported by markets in the Caribbean Basin region from the United States and from the world as a whole.

Top Food Ingredients Imported by Caribbean Basin from the United States (USD)

Product	2021	2022	2023	2024	2025	Change 2024/25
100199 wheat and meslin, not durum wheat, other than seed	9,981,092	4,816,527	66,081,622	54,868,906	57,862,805	5%
230400 soybean oilcake and other solid residues resulting from the extraction of soybean oil, whether or not ground or in the form of pellets	16,711,832	13,063,210	20,486,601	31,244,807	26,569,336	-15%
190120 mixes and doughs for the preparation of bread, pastry, cakes, biscuits and other bakers' wares.	10,098,214	12,816,938	13,669,518	15,166,707	16,103,677	6%
15790 edible mixtures or preparations of animal or vegetable fats or oils or of fractions of different fats and oils covered	10,525,876	15,372,461	16,519,912	14,122,447	15,107,006	7%
120190 soybeans, other than seed	3,624,986	3,425,186	15,282,419	12,231,549	6,442,079	-47%

Top Food Ingredients Imported by Caribbean Basin from the World (USD)

Product	2021	2022	2023	2024	2025	Change 2024/25
170199 cane or beet sugar and chemically pure sucrose, refined, in solid form, not containing added flavoring or coloring matter	46,297,762	60,185,223	57,692,327	70,675,420	69,657,264	-1%
100199 wheat and meslin, not durum wheat, other than seed	70,463,241	82,904,498	82,514,575	62,502,498	57,872,379	-7%
230400 soybean oilcake and other solid residues resulting from the extraction of soybean oil, whether or not ground or in the form of pellets	23,307,627	14,822,231	37,715,135	42,691,060	35,144,799	-18%
15790 edible mixtures or preparations of animal or vegetable fats or oils or of fractions of different fats and oils covered by headings 1501 through 1515	25,702,400	36,063,085	30,867,551	24,628,269	27,757,703	13%
190190 malt extract food products of flour, meal, etc.	20,967,036	28,346,845	26,043,696	25,160,877	25,511,240	1%

Products Present in Market with Good Sales Potential

The top 10 categories of U.S. food processing ingredients exports to the region are: mixes and doughs; protein concentrates; syrups and sweeteners; wheat flour; odoriferous mixtures; corn flour; malt extract; preparations of flour and milk; corn starch; and other cereal flours.

Products Not Present in Market with Good Sales Potential

Most U.S. product categories are exported to the region, with few restrictions. The region typically follows U.S. food trends, meaning that new and innovative ingredients used in U.S. food processing are likely to have sales potential in the Caribbean Basin. When looking at the emerging healthy trends, there is good sales potential for ingredients that substitute/replace fats, sugar, and/or sodium. These ingredients present significant opportunities for U.S. suppliers to introduce and gain market share.

Product Not Present due to Significant Barriers

The number of restricted products in the Caribbean region is minimal, and the region already imports a wide range of food products from the United States. However, some products (e.g., some poultry, pork, dairy, and wheat products) face tariff and/or non-tariff barriers in selected markets. See CBATO's FAIRS reports (links in Section 5) or contact Post for more information on specific restrictions in the 25 markets covered in the region.

Section 5: Key Contacts and Further Information

If you have questions or comments regarding this report, or need assistance exporting to the Caribbean Basin, please contact the FAS Caribbean Basin Agricultural Trade Office in Miami, Florida. Importer listings are available from the Foreign Agricultural Service for use by U.S. exporters of American food and beverage products.

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

Useful Links

Barbados Manufacturers' Association: <https://bma.bb>

Guyana Manufacturing & Services Association: <https://gmsagy.org>

Trinidad and Tobago Manufacturers Association: <https://www.ttma.com>

Other CBATO Resources

The [2025 Caribbean Basin: Exporter Guide Annual](#) provides an overview of the Caribbean Basin market and export opportunities for U.S. food and beverages in the region.

The ministries of agriculture and health in each individual market are normally the main regulatory agencies for food and beverage products. CBATO's Food and Agricultural Import Regulations and Standards (FAIRS) reports for selected markets are available on the FAS [Global Agricultural Information Network \(GAIN\)](#). Recent FAIRS reports are available for The Bahamas, Barbados, Bermuda, Guyana, and Trinidad and Tobago.

The Bahamas

[Food and Agricultural International Regulations and Standards \(FAIRS\) Country Report, 2025](#)
[FAIRS Export Certificate Report, 2025](#)

Barbados

[FAIRS Country Report, 2022](#)
[FAIRS Export Certificate Report, 2022](#)

Bermuda

[FAIRS Country Report, 2021](#)
[FAIRS Export Certificate Report, 2021](#)

Guyana

[FAIRS Country Report, 2023](#)
[FAIRS Export Certificate Report, 2023](#)

Trinidad and Tobago

[FAIRS Country Report, 2024](#)
[FAIRS Export Certificate Report, 2024](#)

Attachments:

No Attachments