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Report Highlights:

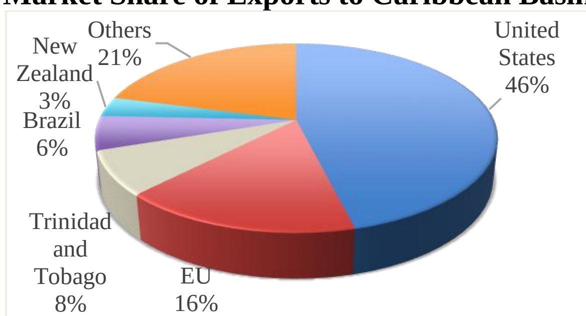
The Caribbean Basin region continues to experience growth, driven primarily by the steady rise in tourism, which in turn impacts consumer demand. In 2025, U.S. exports of consumer-oriented agricultural products to the Caribbean Basin reached $1.7 billion, a 4 percent increase compared with 2024. U.S. 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 $3.7 billion in 2025, with the United States capturing 46 percent of the market.

Market Share of Exports to Caribbean Basin



Food Retail Industry: Total food retail sales (excluding sales tax) were estimated at $10.89 million in 2025. Approximately 82 percent of imported foods and beverages are channeled through the retail sector, which includes traditional grocery stores as well as upscale supermarkets and convenience stores.

Food Processing Industry: Due to economies of scale, food production remains 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.

Food Service Industry: Tourism is a key factor generating demand for U.S. products in the food service sector. Sales reached $2.5 billion in 2025, including cafes/bars, full-service restaurants, limited-service restaurants, and street stalls/kiosks.

2025 Quick Facts

Imports of Consumer-Oriented Products

$3.7 billion

Top 10 Growth Products

1. Poultry Products	6. Prepared Foods
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	$2.5 billion
Food Processing Ingredients	Not available
Food and Agriculture Exports	$752 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: 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

Strengths	***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 1: 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 this 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 approximately 5 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, as well as people of African, European, Indian, and Middle Eastern descent, among others.

With approximately 9.8 million stopover tourists and more than 20 million cruise ship passengers visiting the region in 2025, tourism is the main economic driver for most Caribbean markets. Beyond tourism, the region's economy generally relies on foreign investment to support development, particularly in industries such as energy, infrastructure, and agriculture. Real GDP growth of tourism-dependent Caribbean countries increased by 2.3 percent in 2025. The International Monetary Fund reports that the Eastern Caribbean experienced economic growth of 3 percent in 2025, supported by a strong influx of tourists and ongoing infrastructure investments. The economies of Trinidad and Tobago and Guyana are largely based on oil and gas production. In Trinidad and Tobago, the economic outlook is optimistic, driven by expectations of renewed oil and gas activity that could boost economic growth. In Guyana, GDP grew by 10.3 percent in 2025, and the pace of economic expansion is moderating as it transitions toward stable growth, constrained by a limited labor supply and demand for additional infrastructure projects. According to the World Bank, GDP 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 $10,405 in Dominica to more than $142,855 in Bermuda.

Advantages for U.S. Exporters	Challenges for U.S. Exporters
Growth in the number of stopover tourists leads to increased demand for food and beverage products in many markets.	Market demand in tourism-based economies fluctuates when tourism industry is affected by external factors such as severe weather events.
Consolidated shipping options give small and medium-sized U.S. suppliers the opportunity to test new markets.	Storage capacity is limited so buyers tend to place smaller, more frequent orders.
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.
Increased U.S. tourism in the region drives demand for high-quality U.S. products.	The region is fragmented into small markets, which limits connectivity and inter-island cargo.
Caribbean food manufacturers are expanding into additional markets, and they are looking for new suppliers.	Outdated port infrastructure in some markets can pose logistical challenges, resulting in high shipping and freight costs.

[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, 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.

Section 2: 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 working an importer/wholesaler versus selling directly to customers. Exporters who can travel to region periodically to meet directly with clients 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 target 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 6) 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, and low fat, can motivate consumers to pay a premium price, especially in higher income markets. Additionally, the region's diverse culinary heritage drives interest in savory and seasoned foods that use blends of spices, peppers, and herbs. At the same time, busy lifestyles and increasing participation of women in the workforce are contributing to rising demand for convenient meal solutions.

Section 3: Import Food Standards, Regulations and Procedures

The regulatory environment in the Caribbean Basin is generally quite friendly to U.S. products. Practically all markets accept standard U.S. food labels. Exports of most U.S. foodstuffs do not require sanitary product registration, laboratory testing, or special certification beyond the normal export certificates. 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: Bermuda Export Certificate Report 2021, Barbados Export Certificate Report 2022, Guyana Export Certificate Report 2023, Trinidad and Tobago Export Certificate Report 2025, and The Bahamas Export Certificate Report 2026. 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 generally 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-EU Economic Partnership Agreement[2]
- The CARIFORUM-UK Economic Partnership Agreement[2]

[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: 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: Bermuda FAIRS Country Report 2021, Barbados FAIRS Country Report 2022, Guyana FAIRS Country Report 2023, Trinidad and Tobago FAIRS Country Report 2025, and The Bahamas FAIRS Country Report 2026.

Section 4: Market Sector Structure and Trends

The Caribbean Basin region continues to experience growth across all sales channels, driven largely by strong tourism demand and ongoing infrastructure investments. Among these channels, the food service sector presents the greatest market opportunity due to the high concentration of hotels and restaurants throughout the region. Entering the retail sector is more challenging, as securing shelf space in highly competitive markets could require negotiation of terms and financial investment. In the food processing sector, some companies also require suppliers to complete product testing before approving new ingredients. Most channels are supplied by local, regional, and international distributors, as well as several large companies that have their own purchasing offices. Below is an overview of the market structure for each food channel.

Retail Sector: An estimated 82 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.

Caribbean* Grocery Retailers by Type, 2025

Type	Number of Outlets	Retail Sales Million $
Convenience Retailers	1,352	925
Supermarkets	601	4,142
Hypermarkets	45	1,529
Discounters	193	1,209
Warehouse Clubs	3	300
Food & Drink Specialists	4,816	1,223
Small Local Grocers	8,792	1,560
TOTAL	**15,802**	**10,887**

*Excludes Turks and Caicos, St. Martin, St. Barts, and BES Islands
Source: Euromonitor International

According to Euromonitor International, retail sales in the CBATO region totaled an estimated $10.89 billion in 2025, up 4 percent compared to 2025. The number of retail outlets in the region continued to slightly decline in 2025, from 15,809 to 15,802, as modern retail formats, including supermarkets, convenience stores, and mini markets, gained market share. Some of the largest regional supermarket 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. Supermarkets 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 Foods Annual Report.

Food Service Sector: The Caribbean hotel, restaurant, and institutional (HRI) food service sector is estimated to account for roughly 18 percent of consumer-oriented agricultural imports. According to Euromonitor International, the industry is made up of more than 7,300 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 $2.5 billion in 2025. The industry is expected to continue growing as tourism expands. 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. Locally owned, independent restaurants are particularly popular in countries such as Aruba, Guadeloupe, Martinque, Saint Lucia, and The Bahamas. 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. Additional information can be found in the CBATO's Caribbean Basin: Food Service Annual Report.

Caribbean* Food Service Operators by Type, 2025

Type	Number of Outlets	Food Service Sales $ Million
Cafes & Bars	937	243
Full-Service Restaurants	2,970	775
Limited-Service Restaurants	939	1,402
Street Stalls & Kiosks	2,485	99
TOTAL	**7,331**	**2,519**

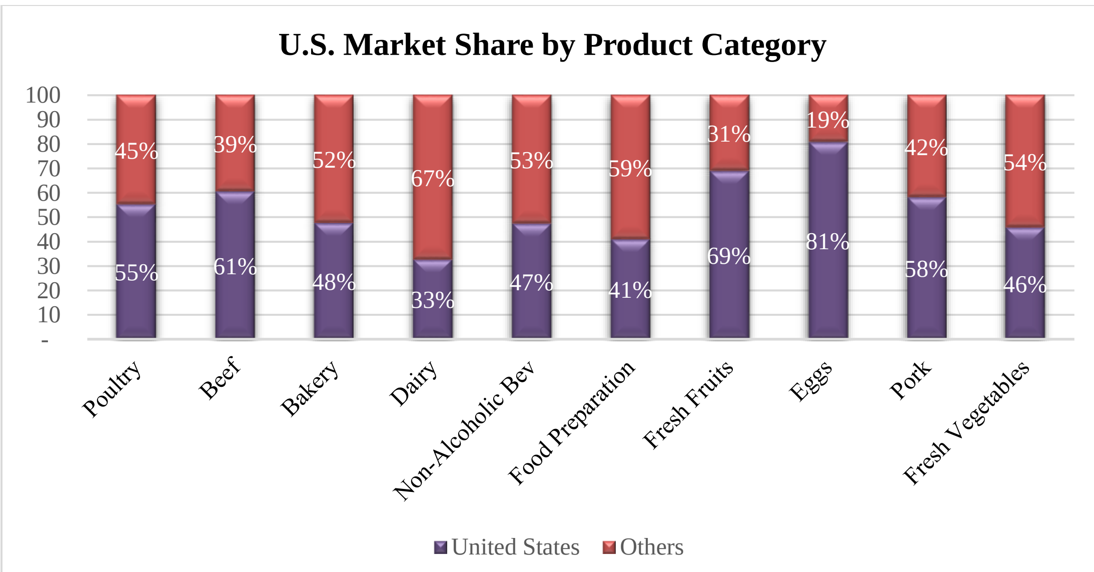
*Excludes Turks and Caicos, St. Martin, St. Barts and BES Islands
Source: Euromonitor International

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. Trinidad and Tobago companies manufacture alcoholic and non-alcoholic beverages, prepared foods, bakery goods, and candy and snack products. Barbados has manufacturers that produce wheat flour, pasta, bakery goods, 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 5: Agricultural and Food Import Statistics

Agricultural and Food Import Statistics: In 2025, the region imported over $3.7 billion in agricultural products from around the world, an increase of 4 percent from 2025. The top 10 markets in the CBATO region for U.S. agricultural products are The Bahamas, Trinidad and Tobago, Aruba, Guyana, Cayman Islands, Barbados, Bermuda, Turks and Caicos Islands, Sint Maarten, and Curacao. Together, these markets account for 86 percent 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 (88 percent), Cayman Islands (80 percent), and The Bahamas (75 percent). Given limited domestic agricultural production and food processing, consumer-oriented foods account for 84 percent of total agricultural exports. The remainder is comprised of intermediate or semi-processed products (8 percent) and bulk commodities (7 percent). Please see the Appendix of this report for more detail on U.S. exports of agricultural products to the Caribbean from 2021-2025.

The Caribbean Basin presents export opportunities in a wide array of product categories. The United States is the largest supplier in many food categories. The table below shows U.S. market share in various product categories. Successful market entry ultimately depends on a new exporter's ability to get Caribbean buyers to consider a new product and begin a business relation. Exporters should be prepared to invest in samples and promotional activities to support a strong introduction to the market.



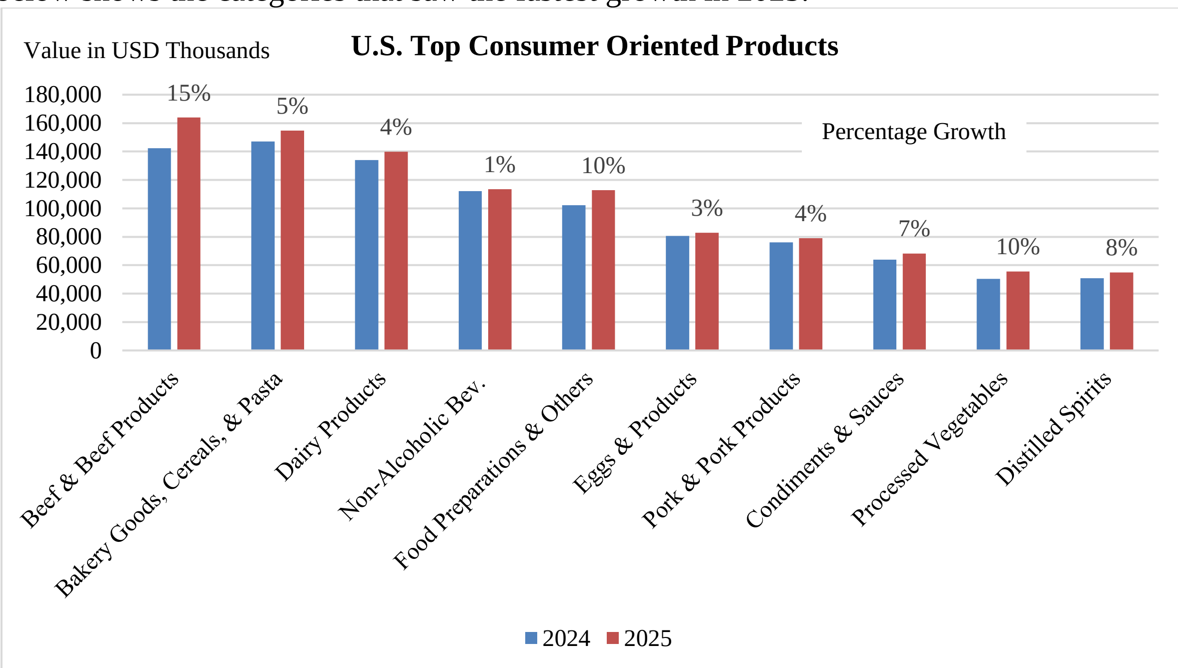
The table below identifies the categories that have experienced the highest growth rates in the Caribbean Basin region over the past 5 years and highlights the subcategories that offer significant market potential for U.S. exporters. Other categories that have also experienced growth over the past five years; however, represent a smaller share of total exports to the Caribbean Basin, include cat and dog food, chewing gum and candy, condiments and sauces, distilled spirits, and wine.

Product Category	Average Annual Growth* 2021/2025	Product Subcategories
Poultry Meat & Products	8.99	- All cuts, fresh, chilled, prepared meats and edible offal of chicken, turkeys, ducks and geese
Beef & Beef Products	7.41%	- Fresh, chilled carcasses of bovine animals, meat of bovine animals, tongues of bovine animals, edible, frozen, livers, offal, others
Food Preparation	4.23%	- Soups and broths and preparations - Food preparations nesoi
Pork and Pork Products	3.79%	- Carcasses, shoulder and cuts swine, hams, liver, fresh, frozen, chilled.

Bakery Goods, Cereals, and Pasta	3.53%	- Mixes and doughs for the preparation of bread, pastry, cakes, biscuits - Pasta (spaghetti, macaroni, etc.), uncooked, not stuffed or otherwise prepared, containing eggs - Cereal, cookies, waffled, bread, pastry, cakes, biscuits, crispbread

*By volume   Source: Trade Data Monitor

Best High-Value, Consumer-Oriented Product Prospects: The top 10 import categories for the Caribbean Basin are poultry and poultry products; beef and beef products; bakery goods, cereals and pasta; dairy products; non-alcoholic beverages excluding juice; prepared foods; fresh fruit; egg products; pork and pork products; and fresh vegetables. Together, these categories account for approximately 69 percent of all consumer-oriented products exported from the United States to the Caribbean Basin. The chart below shows the categories that saw the fastest growth in 2025.



Section 6: Key Contacts and Further Information

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, Trinidad and Tobago, Guyana, Bermuda, and Barbados.

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.

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Appendix: U.S. Exports to the Caribbean Basin, 2021-2025

	Value – USD Thousands				
Product Category	**2021**	**2022**	**2023**	**2024**	**2025**
Intermediate Agricultural Total	176,051	205,382	185,021	178,388	170,374
Bulk Agricultural Total	155,741	188,910	168,751	158,407	149,547
Consumer Oriented Agricultural Total	1,168,713	1,523,439	1,545,055	1,644,009	1,710,826
Poultry Meat & Prods. (ex. eggs)	133,236	174,495	166,327	174,059	167,356
Beef & Beef Products	96,086	119,291	127,303	142,235	163,939
Bakery Goods, Cereals, & Pasta	107,730	131,590	144,843	146,979	154,668
Dairy Products	101,926	127,600	126,526	134,012	139,933
Non-Alcoholic Bev.	70,633	89,445	101,911	112,111	113,533
Soup & Other Food Preparations	89,217	125,131	96,687	102,179	112,837
Fresh Fruit	64,397	78,148	86,042	96,406	95,355
Eggs & Products	49,941	77,794	74,694	80,473	82,861
Pork & Pork Products	54,334	64,752	68,523	75,967	79,049
Fresh Vegetables	47,316	73,141	75,177	83,000	76,631
Condiments & Sauces	40,585	52,321	60,276	63,821	68,288
Processed Vegetables	34,898	45,956	44,424	50,484	55,639
Distilled Spirits	27,295	43,235	49,825	50,858	54,899
Meat Products NESOI	31,891	41,480	46,003	46,986	54,299
Dog & Cat Food	33,650	44,050	39,343	36,909	37,566
Chocolate & Cocoa Products	16,774	22,123	29,859	30,099	35,004
Wine & Related Products	38,093	51,250	40,687	37,323	34,794
Fruit & Vegetable Juices	25,018	37,636	33,719	34,937	31,279
Nursery Products & Cut Flowers	19,366	20,596	22,671	25,522	27,597
Processed Fruit	17,112	20,044	20,566	22,274	24,420
Beer	18,888	25,385	19,285	20,186	19,725
Mfg. Tobacco	5,598	5,691	13,424	19,133	19,347
Coffee, Roasted and Extracts	8,685	13,565	15,514	16,151	18,095
Tree Nuts	16,349	16,767	13,937	14,537	17,314
Chewing Gum & Candy	9,711	10,823	13,467	14,763	14,502
Spices	6,949	7,842	9,398	9,804	8,652
Tea	3,039	3,287	4,626	2,801	3,243
Agricultural Total	1,500,505	1,917,732	1,898,827	1,980,803	2,030,747

Source: U.S. Census Bureau

Attachments:

No Attachments