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GAIN Report

Global Agricultural Information Network

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Caribbean Basin

Exporter Guide

Caribbean Basin Exporter Guide

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Report Highlights:

Following record-setting levels in 2010, U.S. exports of consumer-oriented products to the islands of the Caribbean Basin are climbing to new highs in 2011. The upward trend is expected to continue throughout 2012 as tourism, the region's economic engine, begins to gain steam. Although economic recovery is progressing modestly, demand for U.S. foods remains as strong as ever. However, U.S. suppliers looking to capitalize on the many export opportunities in the region should be aware that third country competition is on the rise.

Post:

Miami ATO

Executive Summary:

NOTE: For purposes of this report, the term “Caribbean” refers to the Caribbean Basin Agricultural Trade Office’s (CBATO) islands of coverage: Anguilla, Antigua & Barbuda, Aruba, The Bahamas, Barbados, Bermuda, British Virgin Islands, Cayman Islands, Dominica, Grenada, Guadeloupe, Martinique, Montserrat, the former Netherlands Antilles (Bonaire, Curaçao, Saba, Sint Eustatius, and Sint Maarten), St. Barthélemy, St. Kitts and Nevis, St. Lucia, St. Martin, St. Vincent & the Grenadines, Trinidad and Tobago, and Turks and Caicos Islands.

The Caribbean is an excellent market for U.S. suppliers, due in large part to the fact that demand for imported food products is largely inelastic. With an insufficient amount of arable land, scant water resources in some islands, no economies of scale, and a limited food-processing sector, the islands must import the majority of their food needs. There is also strong appeal among the 3.8 million local residents of U.S. products. Moreover, between six and seven million stop-over tourists (over half of which are from the United States) visit the Caribbean annually and help fuel demand for U.S. products in Caribbean food service outlets. Although Caribbean tourism activity slowed in 2009, most tourism performance measures indicate a positive recovery since then. The expectation is one of continued growth in 2012 and beyond.

Given these favorable conditions for U.S. exports, it is no surprise that the United States is the largest supplier of food products to the Caribbean. In 2010, the United States exported a record high \$782 million worth of consumer-oriented products to the region, a 5.7 percent increase from the previous year. Preliminary data indicate that U.S. exports of consumer-oriented products to the region will experience similar growth in 2011. Consumer-oriented products account for over 60 percent of U.S. agricultural, fish and forestry exports to the Caribbean, with poultry, red meats, snacks, dairy products, and processed fruit and vegetables rounding out the top five export categories. In 2010 the United States also exported a record high \$38.6million dollars worth of fish products to the region, which should reach a similar level in 2011.

Competition from Europe, Canada, South and Central America is becoming more intense in the Caribbean. While the United States enjoys several advantages in the region, U.S. suppliers should be mindful that they will have to work hard at capitalizing on opportunities in the Caribbean in the years to come.

Author Defined:

SECTION I. MARKET OVERVIEW

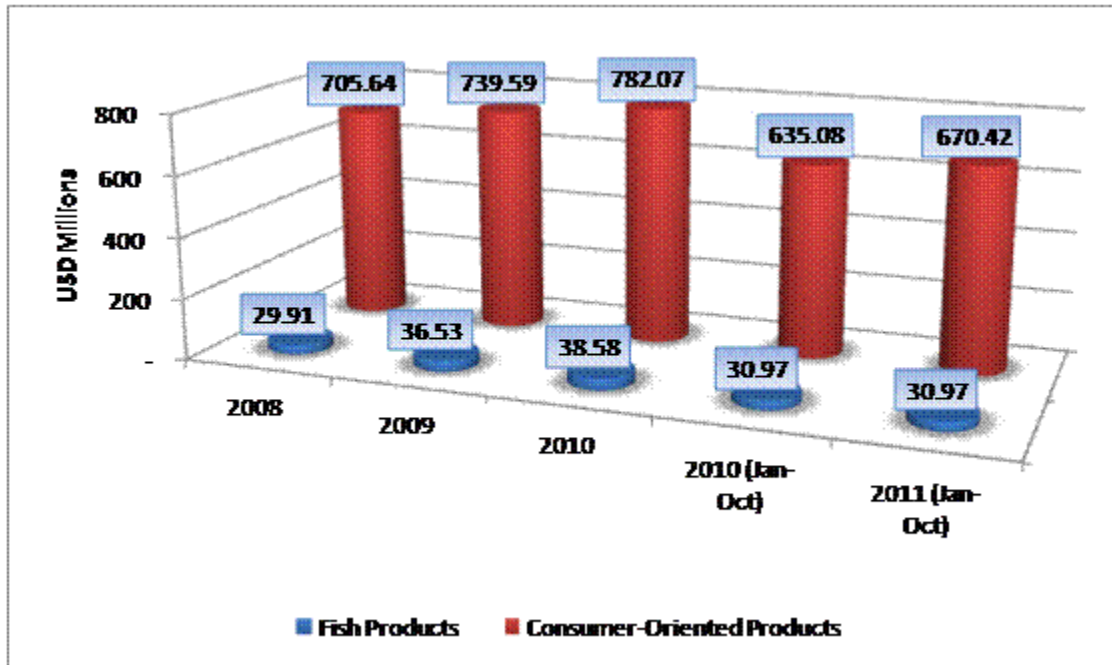
The small economies of the Caribbean, which are highly vulnerable to any external shocks, are still trying to shake off the effects of the deepest global economic recession in recent history, which curtailed tourist activity, dried up worker remittances, reduced foreign direct investment to the region, and softened demand for Caribbean exports. The region began a very modest recovery in 2010, growing by an average of about one percent. According to the United Nations Economic Commission for Latin America and the Caribbean (ECLAC), GDP growth in the English and Dutch-speaking Caribbean (which make up the vast majority of CBATO islands of coverage) was estimated at 0.5 percent in 2010. For 2011 ECLAC estimates GDP growth for the region at 2.2 percent. Prospects for 2012 and beyond will remain largely dependent on the performance of the tourism sector.

Overall economic well being in the Caribbean is intimately linked to the tourism sector. The vast majority of islands in the region rely heavily (some almost exclusively) on tourism as a source of income. The region's tourism industry is beginning to make a comeback as the world economy slowly improves from the recession of recent years. Tourist inflows to the region and revenue generation are up, as is capital investment in the sector. While the economies of the region should regain some traction as tourism turns the corner, the sector remains highly exposed to advanced economy employment prospects.

The upward economic trend, albeit modest and somewhat fragile, spells good news for U.S. suppliers. In fact, demand for U.S. foods remains as strong as ever. With an insufficient amount of arable land, scant water resources in some islands, no economies of scale, and a limited food-processing sector, the islands of the Caribbean must import the majority of their food needs. There is also the strong appeal of U.S. products among the 3.8 million local residents. This is primarily due to exposure to U.S. products through visits that many Caribbean citizens make to the United States and through U.S. television programming which is widely available throughout the region via satellite. Moreover, between six and seven million stop-over tourists (over half of which are from the United States) visit the Caribbean annually and help fuel demand for U.S. products in Caribbean food service outlets.

Given these favorable conditions for U.S. exports, it is no surprise that the United States is the largest supplier of food products to the Caribbean. In 2010, the United States exported a record high \$782 million worth of consumer-oriented products to the region, a 5.7 percent increase from the previous year. Preliminary data indicate that U.S. exports of consumer-oriented products to the Caribbean will experience similar growth in 2011. Consumer-oriented products account for over 60 percent of U.S. agricultural, fish and forestry exports to the Caribbean, with poultry, red meats, snacks, dairy products, and processed fruit and vegetables rounding out the top five export categories. In 2010, the United States also exported a record high \$38.6 million dollars worth of fish products to the region, which should reach a similar level in 2011.

U.S. Exports of Consumer-Oriented and Fish Products to the Caribbean



Source: Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics.

Caribbean importers have a long history of doing business with the United States. Their strong interest in U.S. suppliers and products is mainly due to the following: close proximity, long-standing reputation of high quality products, and superior quality of service. In fact, many local importers have noted that they are able to source a variety of products from non-U.S. suppliers, but few of these suppliers can match their U.S. counterparts in terms of product quality and reliability.

| Advantages | Challenges |
|--|--|
| With little arable land and food production, the islands of the Caribbean must import most of their food needs. | In some markets, such as the French West Indies, a key constraint is breaking the traditional ties with Europe. Chefs in many islands are European trained and thus prefer European products. |
| Tourism continues to regain momentum and remains a key factor in generating demand for U.S. products, particularly in the food service sector. The Caribbean is visited by approximately six to seven million stop-over tourists annually. | Caribbean economic well-being is highly dependent on tourism. Hence, economies remain very susceptible to factors that may disrupt tourism (i.e. the world economy, terrorism, more active hurricane seasons, etc.). |
| The United States is the source of over 50 percent of all tourists visiting the region, boosting demand for U.S. foods. | Ocean transportation rates from the United States can be more expensive than those from Europe. |
| Proximity and frequent transportation service to the region work to the advantage of U.S. suppliers. | Political interest in attaining “regional food security” or “food sovereignty” has strengthened in recent years, and many islands are actively attempting to boost domestic production and diversify food supplies. |

| | |
|---|---|
| Exposure to US media as well as language, cultural, and commercial ties with the United States all contribute to consumers having a positive attitude toward U.S. products. | The nature of individual island markets requires special effort from US exporters: dealing with several small accounts; consolidation of small orders; complying with different import requirements for select products; ascertaining different market characteristics in every island. |
| US exporters, particularly south Florida consolidators, service the market very well and are in many ways better positioned to supply the Caribbean than competitors. | The 2008 trade agreement between the Caribbean and the EU has set the stage for increased competition from Europe. CARICOM is also negotiating a free trade agreement with Canada. |
| The United States has a dominant market share in the vast majority of Caribbean islands (estimated at 55 percent overall). | Other competitors are also targeting the Caribbean. The expansion of the Panama Canal, which is expected to be completed in 2014, may open the door to greater competition from Asia. |
| The regulatory environment at present is fairly open to U.S. products. | Certain products, particularly meat and poultry, may be restricted in selected markets due to either EU or island-specific restrictions. |

SECTION II. EXPORTER BUSINESS TIPS

The best way for a U.S. supplier to enter the market with success is to first research the market for potential niches, and develop an effective marketing plan. A key question is to weigh the advantages and disadvantages of using an importer/wholesaler versus selling directly to different customers throughout the region. The decision will not be the same for all U.S. exporters. For instance, large U.S. suppliers with a dedicated sales force who can travel to the islands periodically to service their customers may find it advantageous to work directly with multiple retail and food service accounts throughout the islands. Exporters who are not able to do so will find it easier to work with an importer/wholesaler in a particular island. The latter is, in fact, the easiest and preferred method for most U.S. exporters.

In general, Caribbean buyers rely heavily on consolidators, particularly those located in South Florida, for shipment of mixed container-loads to their local ports. As a result, a crucial part of doing business with Caribbean importers, is building a relationship with a consolidator in South Florida, and sometimes in New Jersey for purposes of shipping to Bermuda. Since some large resorts and chain supermarkets often order larger shipments directly from suppliers, the main resource for medium to smaller sized retail and food service businesses are local importer/wholesalers, making them a good target for smaller U.S. exporters. These importers/wholesalers will work with prospective U.S. suppliers to find the best means of product delivery, and meeting local standards and regulations. Local importers will usually stay informed of changing regulations and duties on food and beverage products.

In most islands, food safety responsibilities fall under the Ministry of Public Health or its equivalent. The Ministry of Agriculture may also play a role with plant and animal products both in terms of public health and in terms of plant and animal health. Meat and poultry, dairy products, seafood, and produce typically require import approval and health/country of origin certification. For example, phytosanitary certificates from the country of origin must accompany imported fresh produce and plants. Health certificates must accompany live animals and animal products. Certain items may be restricted if the

government decides they pose a risk to food safety or plant and animal health. It is always a good idea for U.S. exporters to verify that their product is eligible for entry into a particular island prior to shipping.

Most Caribbean countries follow international standards (e.g. Codex Alimentarius standards) and fully accept U.S. standards for food and agricultural products, including the standard U.S. nutritional fact panel. However, U.S. suppliers must be aware that EU standards may apply for some EU Member State territories in the Caribbean. The French overseas departments of Guadeloupe & Martinique are a case in point, as they require food and beverage products to be labeled in French and to comply with EU norms. In general, enforcement of labeling and other product standards is carried out mostly at the port of entry, but routine and random checks at the retail and wholesale levels are also conducted. As always, good communication with local importers will help to ensure proper compliance with local food laws.

More information on Caribbean Basin import requirements can be found in the Food and Agricultural Import Regulations and Standards (FAIRS) Reports for the following countries: Aruba, The Bahamas, Barbados, Bermuda, Cuba, Curacao, Sint Maarten, and Trinidad and Tobago.

SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

A. HRI Food Service Sector

Caribbean tourism is beginning to rebound. In 2011, arrivals to the region are expected to increase by about five percent and tourist spending by about three percent. Moreover, the region has seen considerable investment in tourism infrastructure in recent years, which certainly strengthens the long term potential of the hotel, restaurant, and institutional (HRI) food service sector. One such investment is the Baha Mar Project in The Bahamas, which is being billed as the largest resort development currently under construction in North America and the largest single-phase resort development in the history of the Caribbean. The \$2.6 billion, 1,000 acre development will be located 5 miles west of Nassau along a half mile stretch known as Cable Beach. In February 2011, ground was broken on the project and the entire development is expected to be completed in late 2014. When finished, Baha Mar will include six new resort hotels, the Caribbean's largest casino, The Bahamas' largest convention center, and at least 12 new restaurants among other attractions. Bahamian tourism and demand for U.S. foods are expected to increase accordingly. For more information see the following GAIN report: [Tourism Development Spells Good News for U.S. Suppliers.](#)

Overall, the Caribbean HRI food service sector accounts for 40 to 45 percent of consumer-related agricultural imports. The percentage of Caribbean hotels and restaurants that are independently owned varies from approximately 90 percent in Grenada to 25 percent in The Bahamas (Nassau in particular). This characteristic impacts the flow of imports to the island. The independently-owned restaurant or hotel is more likely to source its food and beverage products from local importers/wholesalers, while larger chain restaurants and hotels have both the connections and the economies of scale to also make direct imports from U.S. suppliers.

While corporate-owned resorts and hotels have boomed over recent years, independently- owned food

service businesses are still strong on all Caribbean islands. Local independently-owned restaurants remain especially popular in countries such as Aruba and Barbados. Some of the world's most acclaimed chefs are working in the Caribbean. Using high quality ingredients, these chefs and their restaurants often are a valuable platform for U.S. food and beverage products. However, many chefs are European-trained and thus breaking their preference toward European products can be challenging. Heightened interest of chefs in the use of locally produced ingredients is a recent trend, similar to other parts of the world.

For more information on this sector, see the following GAIN HRI food service sector reports for the Caribbean Basin: The Bahamas (2011), Bermuda (2010), Eastern Caribbean (2009), Netherlands Antilles (2008).

B. Retail Sector

About 55 to 60 percent of consumer-related 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.

As in the HRI sector, smaller retailers such as neighborhood 'mom and pop' stores will buy most if not all of their products from local import wholesalers. These retailers have a slower turnaround on product sales and have limited space for storage, which both lead to wholesale as a preferred option for sourcing food and beverage products.

In contrast, supermarket chains often have both local and U.S. or foreign-based purchasing offices. They work closely with U.S. suppliers to find the best prices for products of interest. Again, a consolidator in South Florida is still crucial to the equation in this market segment.

International retail chains in the Caribbean include: PriceSmart (U.S.), Cost-U-Less (U.S.), Save-A-Lot (U.S.), Carrefour (France), and Albert Heijn Zeelandia (Holland). While these retail outlets do quite well, 'mom and pop' stores will continue to supply a large share of consumers' needs for basic supplies. In addition, national and international convenience stores and gas marts play a small but growing role in consumer food purchases, contributing about fifteen percent of total retail food sales.

An interesting market niche in the retail sector is yacht provisioning. Yachters (or 'yachtees' as they are known in some islands) often phone or fax in their orders to harbor stores or may venture into town to visit the local supermarkets who cater to their specific needs. This is especially prevalent in the British Virgin Islands, Antigua and Barbuda, and Trinidad and Tobago.

The relatively weak U.S. dollar is another factor working in favor of U.S. exports to the region. Caribbean importers are favoring U.S. food and beverage products over EU products. This is especially true in Caribbean countries with currency pegged to the U.S. dollar.

For more information on this sector, see the following GAIN retail sector reports for the Caribbean Basin: The Bahamas (2011), Bermuda (2010), Eastern Caribbean (2009), and the Dutch Caribbean (2008).

C. Food Processing Sector

Food processing in the broad Caribbean Basin is highly concentrated in the larger countries such as the Dominican Republic and Jamaica. In the CBATO's islands of coverage, which have very limited food production and practically no economies of scale, food processing is much less prevalent. In fact, bulk and intermediate agricultural products account for only a quarter of U.S. agricultural exports to the CBATO islands. Nonetheless, there is processing of wheat flour, pasta products, rice, bakery products, soy products, dairy products, and animal feeds in some countries, particularly in Trinidad and Tobago and Barbados. Food processors within the region buy roughly 20 percent of raw materials and food ingredients from local suppliers and import 80 percent from international suppliers.

SECTION IV. BEST CONSUMER ORIENTED PRODUCT PROSPECTS

Market Opportunities exist for practically all high-value, consumer-oriented foods/beverages and seafood products in the Caribbean Basin. Some of the most prominent growth categories include:

| Product Category | 2010 Market Size* (Volume) | 2010 Imports* (\$1,000) | 5-Yr. Avg. Annual Import Growth* | Import Tariff Rate** | Key Constraints Over Market Development | Market Attractiveness for USA |
|------------------------------------|-----------------------------------|--------------------------------|---|-----------------------------|---|---|
| Snack Foods | Min. Local Production | 80,008 | 12% | 0-20% | The retail market is still a niche market, subject to the health of the economy. The HRI mkt. depends on tourism. | As with most consumer-oriented products, demand should continue strong, albeit tempered by overall economic conditions. |
| Red Meats, fresh, chilled & frozen | Min. Local Production | 96,857 | 10% | 0-40% | The retail market is still a niche market, subject to the health of the economy. The HRI mkt. depends on tourism. | As with most consumer-oriented products, demand should continue strong, albeit tempered by overall economic conditions. |
| Dairy Products | Min. Local Production | 78,411 | 16% | 0-20% | The retail market is still a niche market, subject to the | Attractive to U.S. suppliers with market driven approach |

| | | | | | | |
|------------------------------|-----------------------|---------|-----|-----------------------|--|---|
| | | | | | health of the economy. The HRI mkt. depends on tourism. | to business in the Caribbean. |
| Processed Fruit & Vegetables | Min. Local Production | 46,653 | 15% | 0-20% | The retail market is still a niche market, subject to the health of the economy. The HRI mkt. depends on tourism. | As with most consumer-oriented products, demand should continue strong, albeit tempered by overall economic conditions. |
| Fruit & Vegetable Juices | Min. Local Production | 44,667 | 8% | 0-20% | Some domestic production in select islands (i.e. Trinidad & Tobago, Barbados). The retail mkt. is subject to the health of the economy. The HRI mkt. depends on tourism. | As with most consumer-oriented products, demand should continue strong, albeit tempered by overall economic conditions. |
| Poultry Meat | Min. Local Production | 126,724 | 16% | 0-40% in most islands | Some domestic production in select islands (i.e. Trinidad & Tobago, Barbados). The retail mkt. is subject to the health of the economy. The HRI mkt. depends on tourism. A possible increase in CARICOM's common external tariff | As with most consumer-oriented products, demand should continue strong, albeit tempered by overall economic conditions. |

| | | | | | | |
|--|--|--|--|--|--|--|
| | | | | | for poultry products could become a major constraint for U.S. suppliers. | |
|--|--|--|--|--|--|--|

*Total market size data is unavailable. Imports and average annual import growth are based on U.S. export data from the U.S. Bureau of the Census trade data.

**Applied import duties and competing imports may vary from country to country in the Caribbean.

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

A. For more information, please contact:

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 United States Department of Agriculture
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B. Useful U.S. Government Websites:

Foreign Agricultural Service (FAS), USDA
 This site provides extensive information on FAS programs and services, trade statistics, market research, trade shows and events, and much more.
<http://www.fas.usda.gov>

Caribbean Basin Agricultural Trade Office (CBATO), FAS/USDA
 The CBATO website offers information on services available to U.S. exporters in the Caribbean,

promotional activities, market research and more.

<http://www.cbato.fas.usda.gov>

US Department of Commerce

This is the U.S. Government's Export Portal, which provides a wealth of information on services and programs available to U.S. exporters. Comprehensive Country Commercial Guides are available for select markets through the portal's Market Research Library (under the Opportunities tab click on 'Market Research' and then on 'Market Research Library').

<http://www.export.gov>

US Department of State

This site provides valuable information on travel & business in foreign countries, information on U.S. Embassies and Consulates around the world, and country background notes.

<http://www.state.gov>

Central Intelligence Agency

The CIA's on-line World Factbook provides useful and up-to-date guides for practically every country in the world.

<https://www.cia.gov/library/publications/the-world-factbook/>

C. Other Useful Sources of Information (Non-U.S. Government):

The websites listed below are provided for the readers' convenience; USDA does NOT in any way endorse, guarantee the accuracy of, or necessarily concur with the information contained in these websites.

CARICOM (Caribbean Community)

<http://www.caricom.org> Caribbean Hotel & Tourism Association (CHTA)

<http://www.caribbeanhotelassociation.com>

Caribbean Tourism Organization

<http://www.onecaribbean.org>

APPENDIX I. STATISTICS

The following statistics were obtained from several sources. Many sources of statistical information were consulted due to the widespread nature of the Caribbean Basin Agricultural Trade Office's islands of coverage. Some variations, depending on the agency compiling data, will exist in the tables provided.

TABLE A. KEY CARIBBEAN BASIN TRADE & DEMOGRAPHIC INFORMATION

| | |
|---|-------------------------------|
| Agricultural Imports From All Countries (\$Mil) / U.S. Market Share (%) 1/ | 2,200.1/57.8% |
| Consumer Food Imports From All Countries (\$Mil) / U.S. Market Share (%) 1/ | 1,414.8/58.3% |
| Edible Fishery Imports From All Countries (\$Mil) / U.S. Market Share (%) 2/ | 97.6/43.6% |
| Total Population (Millions 3/) / Annual Growth Rate (%) | 3.8 /Range: -0.3 to 3.5% |
| Urban Population (Millions 3/) / Annual Growth Rate (%) | 1.7/Range:0.2 to 3% |
| Number of Major Metropolitan Areas 4/ | 0 |
| Size of the Middle Class (Millions) / Growth Rate (%) | N/A |
| Per Capita Gross Domestic Product (ppp, U.S. Dollars) | Range: \$3,400 to \$69,900 |
| Unemployment Rate (%) | Range: 2.1 to 23 % |
| Per Capita Food Expenditures (U.S. Dollars) | N/A |
| Percent of Female Population Employed 5/ | Range: 36.7% to 68.8% |
| Exchange Rate (US\$1 = Caribbean country's currency) | Varies by Country |

Footnotes:

1/ 2009 estimate based on available Global Trade Atlas data for Antigua & Barbuda, Aruba, The Bahamas, Barbados, Dominica, Grenada, Montserrat, St. Vincent & The Grenadines, Trinidad & Tobago, and Turks & Caicos Islands.

2/ 2009 estimate based on available Global Trade Atlas data for Antigua & Barbuda, Aruba, The Bahamas, Barbados, Dominica, Grenada, Montserrat, St. Vincent & The Grenadines, and Trinidad & Tobago.

3/ 2011 mid-year estimates.

4/ Populations in excess of 1,000,000

5/ Refers to economically active female population as a percentage of total female population.

Source: CIA World Factbook, Global Trade Atlas, Euromonitor, and Curacao Bureau of Statistics.

TABLE B. CONSUMER FOOD AND EDIBLE FISHERY PRODUCT IMPORTS

(Thousands of U.S. Dollars)

| | 2008 | 2009 | 2010 | 2010 (Jan - Oct. | 2011 (Jan - Oct. |
|-------------------------|---------|---------|---------|------------------------|------------------------|
| Consumer Oriented Total | 705,641 | 739,585 | 782,066 | 635,082 | 670,419 |
| Poultry Meat | 111,302 | 115,353 | 126,724 | 102,044 | 107,883 |
| Other Consumer Oriented | 115,629 | 123,789 | 118,427 | 98,337 | 94,561 |

| | | | | | |
|------------------------------|----------------|----------------|----------------|----------------|----------------|
| Red Meats, FR/CH/FR | 82,103 | 85,732 | 96,857 | 75,823 | 84,567 |
| Snack Foods | 67,557 | 75,032 | 80,008 | 65,516 | 67,435 |
| Dairy Products | 72,563 | 74,714 | 78,411 | 64,224 | 74,202 |
| Processed Fruit & Vegetables | 42,987 | 38,208 | 46,653 | 37,833 | 40,787 |
| Fruit & Vegetable Juices | 34,731 | 37,914 | 44,667 | 37,350 | 37,316 |
| Wine and Beer | 34,748 | 33,273 | 34,512 | 28,101 | 29,549 |
| Pet Foods | 23,755 | 29,629 | 27,769 | 22,890 | 22,122 |
| Fresh Fruit | 34,214 | 31,766 | 26,626 | 21,300 | 22,734 |
| Fresh Vegetables | 23,376 | 20,831 | 24,038 | 19,560 | 20,463 |
| Breakfast Cereals | 15,964 | 21,759 | 23,895 | 19,725 | 21,610 |
| Eggs & Products | 16,466 | 17,106 | 19,441 | 15,923 | 16,973 |
| Red Meats, Prep/Pres | 11,381 | 16,498 | 17,127 | 13,332 | 14,249 |
| Nursery Products | 12,395 | 11,323 | 9,591 | 7,123 | 8,759 |
| Tree Nuts | 6,471 | 6,658 | 7,320 | 6,002 | 7,208 |
| Fish Products | 29,913 | 36,532 | 38,576 | 30,968 | 30,972 |
| Other Edible Fish & Seafood | 25,889 | 31,472 | 33,631 | 26,968 | 26,300 |
| Salmon Whole or Eviscerated | 934 | 1,087 | 1,740 | 1,332 | 1,977 |
| Salmon Canned | 1,256 | 1,963 | 1,440 | 1,213 | 1,279 |
| Crab & Meat | 1,088 | 1,287 | 1,253 | 986 | 977 |
| Roe & Urchin (Fish Eggs) | 746 | 723 | 511 | 470 | 439 |
| TOTAL | 735,554 | 776,117 | 820,642 | 666,050 | 701,392 |

Note: Trade data for approximately half of the Caribbean Basin countries are unavailable from the UN Trade database and other private databases either because the reporting countries have not reported the data or simply because the data do not exist. Therefore, the above table is based on U.S. export data only. Overall U.S. market share is estimated at 55 percent, ranging from single digits in the French Antilles to as much as 99 percent in Turks and Caicos Islands.

Source: U.S. Bureau of the Census Trade Data.

TABLE C. TOP 15 SUPPLIERS OF CONSUMER FOODS & EDIBLE FISHERY PRODUCTS

Consumer-Oriented Agricultural Imports*, US\$

| Partner | 2007 | 2008 | 2009 |
|----------------|---------------|---------------|---------------|
| World | 1,088,103,497 | 1,231,890,206 | 1,317,224,572 |
| United States | 631,186,659 | 702,682,717 | 772,480,605 |
| Netherlands | 26,456,404 | 31,961,720 | 61,716,195 |

| | | | |
|-------------------|------------|------------|------------|
| Trinidad & Tobago | 43,473,277 | 49,027,154 | 49,406,177 |
| New Zealand | 47,391,001 | 68,155,655 | 44,994,073 |
| Brazil | 23,164,729 | 28,239,746 | 36,621,437 |
| Canada | 47,061,967 | 43,127,790 | 36,219,189 |
| United Kingdom | 31,666,266 | 32,272,638 | 29,194,131 |
| Costa Rica | 15,538,135 | 17,717,778 | 23,899,893 |
| Ireland | 24,462,885 | 29,658,642 | 22,415,832 |
| Argentina | 13,665,319 | 15,141,053 | 14,224,894 |
| France | 13,312,492 | 16,439,137 | 14,003,563 |
| St. Lucia | 10,272,289 | 12,808,787 | 13,757,435 |
| Jamaica | 12,518,137 | 12,849,190 | 12,893,404 |
| Australia | 8,634,352 | 10,404,160 | 12,525,718 |
| Chile | 6,595,610 | 10,185,402 | 11,742,058 |

** Import data for all Caribbean Basin countries are not available. Data in the above table are for Antigua & Barbuda, Aruba, The Bahamas, Barbados, Dominica, Grenada, Montserrat, St. Vincent & the Grenadines, Trinidad and Tobago, and Turks and Caicos Islands.*

Source: Global Trade Atlas.

Fish & Seafood Product Imports*, US\$

| Partner | 2007 | 2008 | 2009 |
|----------------|-------------|-------------|-------------|
| World | 71,144,712 | 77,902,364 | 75,774,320 |
| United States | 26,458,524 | 30,476,385 | 28,492,257 |
| Canada | 15,973,013 | 17,078,684 | 17,135,860 |
| Thailand | 4,803,218 | 5,821,259 | 6,561,767 |
| Guyana | 4,089,427 | 4,863,931 | 4,045,538 |

| | | | |
|------------------------------|-----------|-----------|-----------|
| Suriname | 923,561 | 1,878,286 | 3,508,610 |
| Other Asia N.E.S. | 4,975,526 | 868,849 | 2,704,552 |
| Norway | 2,937,429 | 3,485,423 | 2,579,239 |
| Chile | 1,581,739 | 1,475,673 | 1,849,436 |
| Trinidad & Tobago | 1,031,222 | 1,153,832 | 1,454,694 |
| Panama | 2,135,188 | 1,422,252 | 1,021,688 |
| Belize | 786,704 | 1,547,779 | 872,119 |
| St. Vincent & the Grenadines | 619,958 | 1,745,152 | 870,716 |
| United Kingdom | 712,161 | 997,050 | 744,824 |
| Vietnam | 206,413 | 504,604 | 656,318 |
| Costa Rica | 434,736 | 586,225 | 571,298 |

** Import data for all Caribbean Basin countries are not available. Data in the above table are for Antigua & Barbuda, The Bahamas, Barbados, Dominica, Grenada, Montserrat, St. Vincent & the Grenadines, and Trinidad and Tobago.*

Source: Global Trade Atlas.