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Report Highlights:

The Caribbean remains a strong and growing market for U.S. food and beverage suppliers, driven by a heavy reliance on imports and a steady rebound in tourism. With the region importing $3.7 billion in consumer-oriented agricultural products in 2025 and the United States maintaining a 46 percent market share, opportunities continue to expand across the region. Retail food sales rose to $10.9 billion in 2025, reflecting both inflationary pressures and increasing demand for value-focused products. Despite some logistical challenges and rising shipping costs, U.S. suppliers benefit from established commercial ties, strong brand perception, and a favorable regulatory environment.

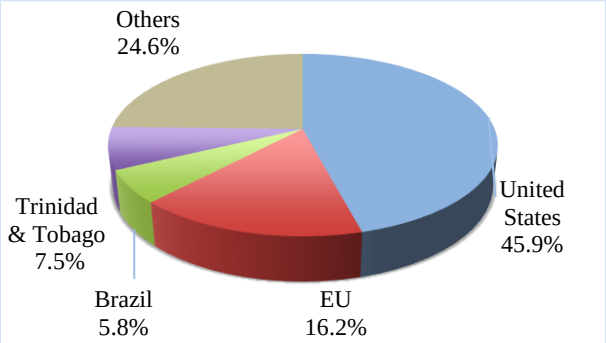
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Caribbean Basin Retail Foods Report

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
Food imports are a necessity in the Caribbean, as domestic agriculture and food processing are 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 Exporters to Caribbean Basin



Food Retail Industry
Total food retail sales are estimated to have grown from $10.5 billion in 2024 to $10.9 billion in 2025. Approximately 75-80 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
As farm activity is highly constrained in the region, food processing is also limited in most markets, with Trinidad and Tobago (TT), Barbados, and Guyana being notable exceptions. The sector is valued at an estimated $470 million in TT.

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, an increase of 8.5 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.

2025 Quick Facts

Imports of Consumer-Oriented Products
U.S. $3.7 billion

Top 10 Growth Products

1. Beef & Beef Prod.	6. Non-Alcoholic Bev.
2. Eggs & Products	7. Fresh Fruit
3. Prepared Foods	8. Poultry Meat & Prod.
4. Pork & Pork Prod.	9. Dairy Products
5. Bakery Goods	10. Fresh Vegetables

Food Industry by Channels

Retail Food Industry	$10.9 billion
Food Service-HRI	$2.5 billion
Food Processing Ingredients	Not available
Food and Agriculture Exports	$824 million

Top 10 Retailers
Massy Stores, Super U, Super Value, Carrefour, AML Foods, The Market Place, Pli Bel Place, Price Smart, Graceway Supermarkets, and Tru Valu Supermarket.

GDP/Population
Population: 4.9 million

GDP: Ranges from $723.9 million (Dominica) to $27.1 billion (Guyana)

GDP per capita: Ranges from $10,989 (Dominica) to $142,250 (Bermuda)

Sources: Trade Data Monitor, Euromonitor, World Bank, French National Statistics Institute (INSEE), database.earth, UN World Meter Prospects & Worldometer.

Strengths	***Weaknesses***
The United States holds a logistical advantage, with extensive consolidation and shipping options, particularly through the South Florida gateway.	Extreme weather threats and high logistics costs in some locations may limit the ability of U.S. products to compete for value-conscious consumers.
Opportunities	***Threats***
Suppliers of private label and value products will find receptive consumers in the Caribbean.	Competition from within the region is emerging. In 2025, Trinidad and Tobago ranked as the third-largest supplier behind the U.S. and Europe.

Section 1: Market Summary

The Caribbean Basin's[1] food retail sector continues to expand, registering $10.9 billion in sales (excluding sales tax) in 2025, compared to $10.5 billion a year earlier, according to Euromonitor. This represents a 3.9 percent increase, driven largely by rising price levels rather than real volume growth. Under such circumstances, Caribbean consumers are increasingly seeking value products while retailers are responding by focusing product offerings in several markets.

In a region which relies heavily on imports for most of its food needs, there is heightened sensitivity to food prices in the main source markets such as the United States and Europe. This is especially true of most small island economies, which have limited agricultural production and food processing. Data from the International Monetary Fund (IMF) shows tourism-dependent economies in the Caribbean exhibited moderate inflation of 2.6 percent in 2025. This rate is projected to increase to 4.6 percent in 2026, indicating retail shelf prices across the region will continue their upward trend. Exacerbating the situation, rising world fuel prices are pushing shipping costs upward, which further increases landed prices of imported food. Many of the main ocean carriers to the region have raised bunker surcharges in 2026, citing global fuel volatility.

On the other hand, tourism recovery remained the strongest regional driver. In 2025 cruise ship arrivals to the Caribbean soared by 9 percent, reaching 22.78 million while stop-over visitors (which consume larger amounts of food and beverages from the retail sector) reached 10.53 million, an increase of 3.2 percent from 2024. Tourism growth is probably most evident in Turks and Caicos Islands (TCI), a small archipelago of approximately 47,00 residents, but which received nearly 2 million cruise and stop-over of visitors in 2025. This popularity as a high-end tourism destination is attracting considerable investment. TCI is expected to double its room inventory on the main island from 3,000 to 6,000 by 2030, further driving demand for imported food products.

While tourism continues to exhibit strong performance in most Caribbean markets, regional oil producing countries (Guyana and Trinidad and Tobago) are also currently benefitting from high energy prices. According to IMF data, Guyana remains the standout market leading the region's economic growth, posting an increase of 19.3 percent in real GDP in 2025. With disposal income on the rise for most Guyanese consumers, the country's retail sector is striving to develop and meet the expanding demand of imported goods. Income growth has been uneven across the Caribbean, however. In most tourism-dependent markets of the region real GDP growth ranged from -0.6 percent (St. Lucia) to 6.3 percent (Aruba) in 2025.

[1]*For purposes of this report, the terms 'Caribbean Basin' and 'Caribbean' refer to the CBATO's region of coverage, which consists of the following 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. It is important to note that Cuba is excluded from this report.*

ADVANTAGES	CHALLENGES
Growth in the number of stopover visitors 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.
The United States has a dominant market share in the vast majority of Caribbean islands (46 percent overall). Consumers in the region value the quality of U.S. food and beverages.	A key constraint in the French West Indies is breaking traditional ties with Europe. These islands source almost all their food from the EU, making introducing U.S. products more challenging.
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. Consumers in many markets are price-sensitive, which makes them more likely to switch brands depending on price.
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 exports.	The region is fragmented into small markets with limited connectivity and inter-island cargo. The outdated port infrastructure in some markets can pose logistical challenges, resulting in high shipping and freight costs.
The current regulatory environment is generally favorable to U.S. products, as there is trust in American food standards.	Some Caribbean markets with strong European ties may consider adopting EU regulatory standards that could affect product labeling and packaging. New front-of-pack labeling requirements loom on the horizon.
Exposure to U.S. media as well as language, culture, and commercial ties with the United States all contribute to consumers having a positive attitude toward U.S. products.	Some products, particularly meat and poultry, may be restricted in certain markets due to EU or island-specific regulations.

Section 2: Road Map for Market Entry

A. Entry Strategy

Given the heterogeneous nature of the Caribbean and the large number of markets involved, making an effort to learn the nuances of each potential market is a key to success. Overall, the region has a good distribution and retail system. Many of the larger retailers in the Caribbean prefer to buy products directly from manufacturers when possible. However, the most common method for U.S. suppliers to enter the Caribbean retail food market is through local importers/distributors and/or through supermarkets chains with buying offices in the United States. Local importers/distributors generally have broad access to food and beverage supply channels, possess adequate warehouse facilities, carry a large inventory of products, and service many accounts.

Meeting Caribbean retailers and importer/distributors can be accomplished in several ways. While in-person visits to a market are usually the most effective method of establishing contacts, for many U.S. suppliers seeking to penetrate the Caribbean it can be a daunting proposition in terms of cost and time

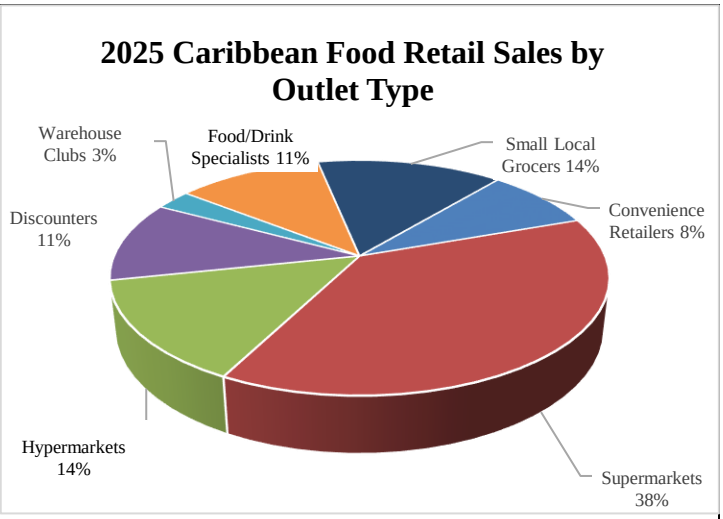
given the fragmented geography of the region. An excellent alternative is meeting buyers at U.S. trade shows such as the Americas Food and Beverage (AFB) Show in Miami, where Caribbean buyers often flock to seek out new products. Other trade shows that attract Caribbean buyers include the National Restaurant Association (NRA) Show in Chicago, the Summer Fancy Food Show in New York City, and the Sweets & Snacks Expo (in Indianapolis in 2027). These events present invaluable opportunities for U.S. suppliers to meet one-on-one with Caribbean buyers. Contact the CBATO (see section V of this report) for more information on Caribbean buying missions to these events or lists of Caribbean retail buyers.

B. Market Structure

According to Euromonitor, the Caribbean retail food sector is comprised of an estimated 15,802 outlets, of which small local grocers and other outlets specializing in food and drinks make up 86 percent. Large and modern supermarkets, hypermarkets, convenience stores, discounters, and warehouse clubs account for just 14 percent of outlets, yet they make up 74 percent of grocery retail sales. Caribbean retail grocery sales increased by 3.9 percent in 2025, growing from $10.48 billion to $10.89 billion.

2025 Caribbean Grocery Retailers

Type	# of Outlets	Retail Sales (USD Millions)
Convenience Retailers	1,352	924.7
Supermarkets	601	4,142.2
Hypermarkets	45	1,528.6
Discounters	193	1,209.2
Warehouse Clubs	3	299.9
Food & Drink Specialists	4,816	1,222.7
Small Local Grocers	8,792	1,560.0
TOTAL	**15,802**	**10,887.3**



Source: Euromonitor
Note: excludes BES Islands, Montserrat, Saint Barthélemy, St. Martin, and Turks and Caicos Islands

South Florida, which has an abundance of food exporters, brokers, and consolidators, is the main gateway for U.S. consumer-oriented exports to the Caribbean. Several shipping lines service the region regularly from South Florida's three seaports (Port of Miami, Port Everglades, and Port of Palm Beach). The major exception is Bermuda which, because of its more northern location, sources most of its food imports from the northeastern United States, namely from New York/Newark and Philadelphia. Caribbean consumers, particularly those on islands close to the United States, often travel to South Florida to purchase food and beverage products (and household goods) at the retail level, and then have them shipped to their respective country. This is especially true in The Bahamas, but consumers will travel to South Florida from as far away as Trinidad and Tobago to purchase U.S. goods and ship them back for their own consumption as well as resale.

C. Company Profiles and Top Caribbean Retailers

Most retail grocery businesses in the Caribbean are made up of one or two small outlets operating in a single market. There are also a handful of larger grocery operations with multiple stores that dominate one particular market. Beyond that, Massy Stores, the largest retailer in the region, is the exception with stores spread out through five Caribbean markets. In addition, several international retail chains have a presence in the region with multiple stores, including PriceSmart, Cost U Less, Super U, and Carrefour.

	Company	Market(s)	# of Outlets	Link
1	Massy Stores	Barbados, Guyana, St. Lucia, Trinidad and Tobago, St. Vincent and the Grenadines.	68	https://www.massystores.com
2	Super U	Guadeloupe, Martinique, Saint Barthelemy, Saint Martin	19	https://www.magasins-u.com/annuaire-magasin/971-guadeloupe
4	Super Value	The Bahamas	13	https://supervaluequalitymarkets.com
5	Carrefour Market	Guadeloupe, Martinique, Sint Maarten, Curacao	23	https://www.carrefour-destreland-contact.com https://www.carrefour-martinique.com http://www.cmsxm.net https://www.crfrcuracao.com
6	The Market Place	Bermuda	8	https://www.marketplace.bm
7	Rite Way	British Virgin Islands	9	https://www.riteway.vg
8	Pli Bel Price	Martinique	7	https://www.plibelprice-martinique.com/
9	PriceSmart	Aruba, Barbados, Trinidad and Tobago	6	https://www.pricesmart.com/site/en/country-picker
10	TruValu	Trinidad and Tobago	5	https://www.facebook.com/TruValuSupermarkets
11	Cost U Less	Cayman Islands, St. Maarten, Barbados & other markets	3	https://www.shopcostuless.com/my-store/store-locator
12	Graceway	Turks & Caicos	6	http://www.gracewaysupermarkets.com/iga
13	AML Foods (Several branded outlets)	The Bahamas	11	https://www.amlfoods.com/solomons/ https://amlfoods.com/solomons-fresh-markets/ https://amlfoods.com/cost-right/ https://amlfoods.com/exuma-markets/ https://amlfoods.com/eleuthera-markets/ https://amlfoods.com/harbour-island-markets/

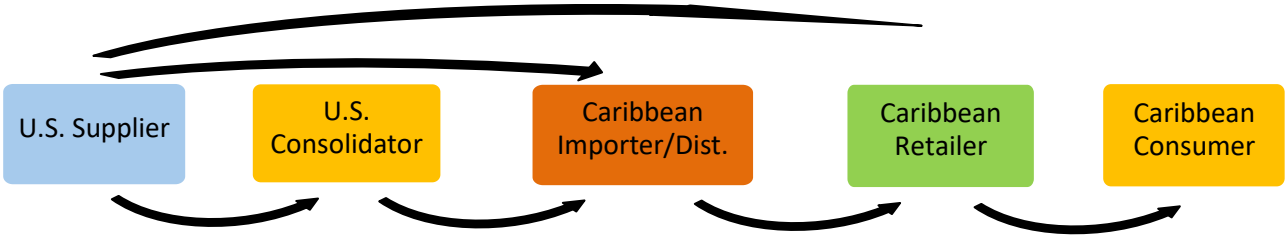
D. Import Procedures

Most Caribbean markets follow international standards (e.g., Codex Alimentarius standards) and largely 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 the European Union's (EU) Food Information to Consumers (FIC) Regulation may apply to some EU member state territories. The French overseas departments of Guadeloupe and Martinique are a case in point, as they require food and beverage products to be labeled in French and to comply with French and EU norms.

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 Global Agricultural Information Network (GAIN). The following reports contain more information on import procedures for select markets in the Caribbean Basin: The Bahamas FAIRS Country Report 2025, Trinidad and Tobago FAIRS Country Report 2024, Guyana FAIRS Country Report 2023, Barbados FAIRS Country Report 2022, and Bermuda FAIRS Country Report 2021. The following reports contain more information on documentation requirements in selected markets: The Bahamas FAIRS Certificate Report 2025, Trinidad and Tobago FAIRS Certificate Report 2024, Guyana FAIRS Certificate Report 2023, Barbados FAIRS Certificate Report 2022, and Bermuda FAIRS Certificate Report 2021.

E. Distribution Channels

Distribution channels can vary by market, depending on whether the Caribbean company buys directly based on volume or through distributors. Most U.S. suppliers have a local importer/distributor in each market, who in turn sells to different retail accounts. Where it makes economic sense, large retailers purchase consumer-oriented products directly from U.S. suppliers to obtain better prices, thereby bypassing intermediaries and controlling their supply chain, especially in competitive food retail markets in the region. What is common of most export transactions in the Caribbean is the use of a U.S. consolidator. Because of the small nature of most Caribbean markets, many of the individual product orders are for less than container loads (LCL). In many ways, this makes shipping to the Caribbean easier, as Caribbean buyers will usually request that U.S. suppliers to deliver product to their U.S. consolidator, which in most cases is located in South Florida. The following graph illustrates how most U.S. consumer-oriented products move from U.S. suppliers to Caribbean consumers.



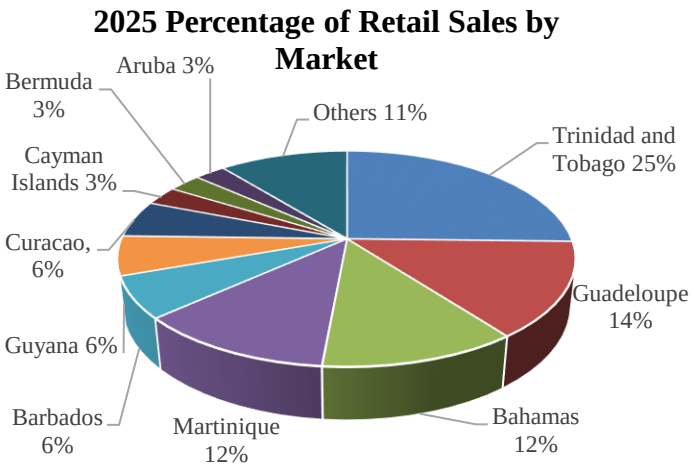
F. Share of Major Markets in the Food Retail Industry

Based on Euromonitor data, the largest grocery market in the region is Trinidad and Tobago, with total sales (excluding taxes) of $ 2.76 billion, followed by the French islands of Guadeloupe at $1.56 billion, and Martinique at $1.29 billion. As mentioned earlier, Guyana is the fastest-growing economy in the region, driven by revenue from oil production. Consequently, some retail chains, such as Massy Stores,

are expanding by opening new retail outlets in Guyana. Below are the top 10 grocery markets in the region based on retail sales.

2025 Caribbean Retail Sales by Market

Market	Retail Sales (USD Millions)
Trinidad and Tobago	2,763.4
Guadeloupe	1,556.3
Martinique	1,292.6
The Bahamas	1,281.6
Barbados	677.1
Guyana	641.8
Curacao	600.6
Cayman Islands	312.4
Bermuda	298.7
Aruba	284.1
Others	1,178.7
TOTAL	**10,887.3**



Source: Euromonitor
Note: excludes BES Islands, Montserrat, Saint Barthélemy, St. Martin, and Turks and Caicos Islands

G. Sector Trends

Consumers in some Caribbean Basin markets have become more price-sensitive, causing many larger retailers to expand their private label and value-priced selections. Small grocery outlets are declining in some Caribbean markets due to less competitive prices. These grocers purchase from distributors instead of directly from exporters, which results in higher costs. As consumers become increasingly price-conscious, loyalty programs, sales, and product promotions are influencing their decisions. There has been a rise in market share for private-label products, which supermarkets usually purchase through distributors, the Independent Grocers Alliance (IGA) network, or other partnerships. Examples of this are Graceway Supermarkets in Turks and Caicos Islands and AML Foods in The Bahamas, which offer "Essential Everyday" items, a private-label line of value products. Other retailers also carry their own private label brands that are focused on providing value options to brand-name and premium products.

Another growing trend is the evolution of supermarkets into convenience hubs, where consumers can buy pastries, pre-packaged chilled cakes, grab-and-go items, and ready-to-eat meals all in one place. Particularly in markets where consumers have busy lifestyles and/or are more affluent, some supermarkets offer in-store cafes and a wide range of fresh bakeries, deli, charcuterie, salad bar, and prepared hot food options. Given the growing consumer interest in ready-to-cook meals, some regional distributors are looking to expand their product lines in this category. Online shopping is also available in cities with broader internet access through e-commerce platforms or mobile apps, offering delivery or pickup options that make the shopping experience faster, easier, and more reliable on these islands.

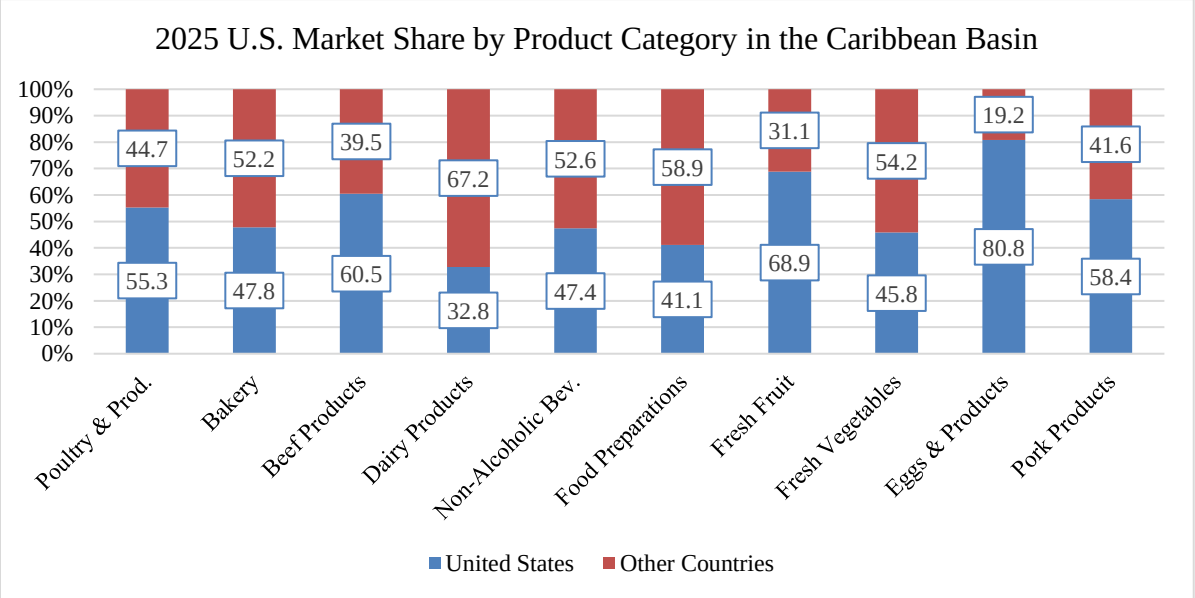
In high-income markets with expat populations like Bermuda, Turks and Caicos, and the Cayman Islands, consumers are seeking more international and gourmet products, as well as healthy foods that cater to various dietary needs. There has been a rise in the number of premium food retailers targeting

this market segment, such as Clifton Market (Barbados), Miles Market (Bermuda), Kirk Market (Cayman Islands), and Bacchus (Saint Martin and St. Barts). Even in some luxury condominium communities, there are small gourmet markets where residents can find a selection of high-quality foods.

Section 3: Competition

The United States accounts for 46 percent of the Caribbean Basin's imported consumer-oriented food and beverage products. In 2025, U.S. exports of consumer-oriented products to the region totaled $1.7 billion. The next closest competitor is the EU with $605 million in exports (16.2 percent), followed by Trinidad and Tobago with $278.4 million (7.5 percent), Brazil with $216.5 million (5.8 percent), and New Zealand with $126 million (3.4 percent).

The top 10 import categories for the Caribbean Basin are dairy, bakery/cereal/pasta, poultry, food preparations, beef, non-alcoholic beverages, fresh vegetables, fresh fruit, pork, and egg and egg products. These categories alone represent two-thirds of all imports of U.S. consumer-oriented products. With only a few exceptions, the United States is the leading supplier in practically all product categories.



Source: Trade Data Monitor

Section 4: Best Product Prospects

A. Top Consumer-Oriented Products Imported from the World, 2023-2025 (USD)

	2023	2024	2025
Dairy Products	388,690,426	404,135,316	427,133,383
Bakery Goods, Cereals & Pasta	286,833,348	299,177,193	323,587,662
Poultry Meat & Prods. (ex. eggs)	274,773,799	304,994,273	302,382,134
Food Preparations	225,734,427	248,257,846	274,711,337

Beef & Beef Products	200,541,251	225,074,128	270,936,387
Non-Alcoholic Bev. (ex. juices, coffee, tea)	214,696,911	244,459,941	239,432,290
Fresh Vegetables	163,254,886	165,411,232	167,360,886
Fresh Fruit	124,056,303	136,564,121	138,370,412
Pork & Pork Products	118,386,358	130,318,170	135,458,781
Eggs & Products	81,318,207	90,920,649	102,546,468

Source: Trade Data Monitor

B. Top Consumer-Oriented Products Imported from the United States, 2023-2025 (USD 000's)

	2023	2024	2025
Poultry Meat & Prods. (ex. eggs)	188,477	196,729	191,609
Beef & Beef Products	127,392	142,365	164,226
Bakery Goods, Cereals, & Pasta	144,843	147,004	154,681
Dairy Products	132,432	140,661	147,228
Non-Alcoholic Bev. (ex. juices, coffee, tea)	112,294	119,836	120,846
Fresh Fruit	86,042	96,406	95,356
Food Preparations	81,008	85,736	94,917
Eggs & Products	74,694	80,470	82,855
Fresh Vegetables	76,354	84,598	79,176
Pork & Pork Products	68,559	76,097	79,131

Source: U.S. Census Bureau Trade Data

Most product categories do well in the Caribbean. Value and versatile beef and pork cuts, fresh produce, fruit juices, convenience goods, and innovative food preparations all exhibit excellent sales.

C. Products Present in Market with Good Sales Potential

In addition to private label and value products mentioned earlier, niche products, particularly gourmet foods, non-alcoholic beverages (waters, sweetened/flavored beverages), and health-focused items in the candy and snacks categories, present a significant opportunity in the region. Fresh fruits and vegetables (e.g., apples, lettuce, tomatoes, potatoes) also present good potential for expanded trade.

D. Products Not Present in Market with Good Sales Potential

Virtually all U.S. product categories are exported throughout the Caribbean Basin region. However, a few markets still rely heavily on Europe as their main food and beverage supplier. For example, the French overseas departments of Guadeloupe and Martinique have traditionally sourced the majority of their imports from the EU, particularly from France. Consequently, U.S. market share on these islands is in the single digits. Breaking these traditional commercial ties in favor of U.S. products is challenging.

E. Products Not Present in Market due to Significant Barriers

The number of restricted products in the Caribbean region is minimal. In Bermuda, the Importation of Milk (Prohibition) Act of 1997 prohibits the importation of any of the following dairy products: raw milk, pasteurized milk, ultra-pasteurized milk, ultra-high temperature (UHT) milk, and manufactured milk. A few Caribbean countries may also prohibit the importation of select produce items for plant quarantine purposes. These include fresh citrus originating from Florida; fresh papaya; fresh sweet potato/North American yam; fresh corn on the cob; fresh carrots; and fresh mangoes (unless they are certified to have been hot water treated at a USDA approved facility).

Section 5: 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 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: http://www.fas.usda.gov

Attachments:

No Attachments