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Report Highlights:

This report highlights the food processing industry, its drivers, key players, and market landscape in the Caribbean Basin. 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. As interregional trade expands, new opportunities are emerging for U.S. suppliers to increase market share.

Caribbean Basin Food Processing Ingredients Report

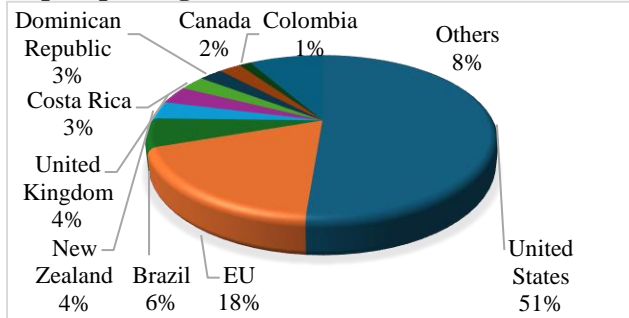
Executive Summary

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

A large majority of foods must be imported in the Caribbean Basin, as domestic production is limited. Total imports of consumer-oriented agricultural products totaled \$3.21 billion in 2024, with the United States capturing 51 percent of the market.

Top Exporting Countries to the Caribbean Basin



Food Retail Industry

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

Food Processing Industry

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

Food Service Industry

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

2024 Quick Facts

Imports of Consumer-Oriented Products

U.S. \$3.21 billion

Top 10 Growth Products

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

Food Industry by Channels

Retail Food	\$10.5 billion
Food Service-HRI	\$2.3 billion
Food Processing	\$2.5 billion
Agricultural Exports	\$813 million

Top 10 Retailers

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

GDP/Population

Population: 4.96 million

GDP: Ranges from \$750 million (Dominica) to \$29.2 billion (Trinidad and Tobago)

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

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

<i>Strengths</i>	<i>Weaknesses</i>
Increasing intraregional trade is supporting expanded food manufacturing	Relatively small food processing sector is relatively small compared to other sales channels
<i>Opportunities</i>	<i>Threats</i>
Limited local availability of many food ingredients and strong trade ties with the United States mean manufacturers rely on American suppliers.	Supply chain disruptions and higher prices from U.S. suppliers may lead some importers to source ingredients from other regions.

Section I: Market Overview

For purposes of this report, the terms "Caribbean" and "Caribbean Basin" refer to the 25 markets¹ covered by the Caribbean Basin Agricultural Trade Office (CBATO), with the exception of Cuba (see full list at the bottom of this page).

The Caribbean Basin is a large and highly fragmented region of the Americas. It is a mix of independent states, overseas departments or dependencies of European countries, and islands that are part of a European kingdom. The region has 4.96 million inhabitants, of which two-thirds are concentrated in five markets: Trinidad and Tobago, Guyana, Guadeloupe, Martinique, and The Bahamas. The population is incredibly diverse and comprises descendants from native tribes that inhabited the region and people of African, European, Indian, and Middle Eastern descent, among others.

The region's economy generally relies on foreign investment to support development, particularly in industries like energy, infrastructure, agriculture, and projects aimed to mitigate and adapt to the effects of climate change. However, the extent of dependence on foreign investment can differ among Caribbean countries.

Gross Domestic Product (GDP) in the Caribbean Basin region ranges from \$750 million in Dominica to \$29.2 billion in Trinidad and Tobago, and GDP per capita ranges from \$12,720 in Grenada to more than \$118,000 in Bermuda. With approximately 9 million stopover tourists and more than 18.6 million cruise ship passengers visiting the region in 2024, tourism is the main economic driver for most Caribbean markets. Real GDP growth of tourism-dependent Caribbean countries increased by 4.17 percent in 2024. Trinidad and Tobago and Guyana are the main exceptions, as their economies are largely based on oil and gas production.

According to the IMF, in 2024 Guyana's GDP grew by 43.8 percent in real terms, marking the sixth consecutive year of growth above 20 percent largely due to the country's expanding oil industry. The development of the oil and gas sector has created new job opportunities, increased government revenue, and increased infrastructure investments, with an estimated 15 new hotels in various stages of development.

The Caribbean's multicultural culinary influence from Europe, India, Africa, and the Americas creates a diverse cuisine. In the region, you can find a range of food options that cater to different tastes and preferences, from comfort food like fried chicken to fusion dishes that blend international flavors. The same is seen in the food manufacturing sector, with unique and local flavor influences for snack foods, baked goods, and confectionary products. Additionally, due to the dietary requirements of some minority groups and consumer health concerns, you can find food products with special ingredients and certifications to meet this demand.

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, 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 and Challenges

ADVANTAGES	CHALLENGES
The consumption index and tourism have risen in recent years, leading to increased demand for food and beverage products in some markets.	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 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.
Well-established private family businesses foster long-term relationships for international trade.	Limited foreign exchange affects trade in countries such as Trinidad and Tobago.
There is an increased emphasis on developing the food production sector to support food security goals, leading to greater demand for imported ingredients that cannot be locally produced.	The region is fragmented into small markets, and old port infrastructure poses logistical challenges, leading to high shipping costs for some markets.
U.S. suppliers are valued for their reliability, consistent quality standards, and proximity to the Caribbean.	Many markets with European ties are considering EU-style trade rules that could restrict imports of certain food ingredients like flavoring and color dyes.

Section II: Road Map for Market Entry

A. Entry Strategy

Trinidad and Tobago, Barbados, and Guyana represent the region's largest food and beverage manufacturing markets. The region has decided 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 Manufacturer's Association (TTMA), Barbados Manufacturing Association (BMA), and the International Food Science Center in Barbados. These institutions aim to support small- and medium-sized companies to build their food processing capacity, develop a skilled manufacturing workforce, and help promote exports of locally manufactured foods to other markets in the region. Bigger companies are utilizing highly automated equipment and are investing in expanded facilities to increase production capacity. Some of these companies are conglomerates that own and operate multiple food-related businesses, from manufacturing to distribution 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. So, Caribbean buyers often establish direct connections with industrial companies by searching for suppliers online, seeking referrals, participating in trade shows, and attending international trade missions organized by local associations in countries such as Trinidad and Tobago. In addition, some U.S. trade associations offer outbound trade missions and training opportunities for Caribbean companies, providing excellent opportunities for them 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 V of this report.

A. Import Procedures

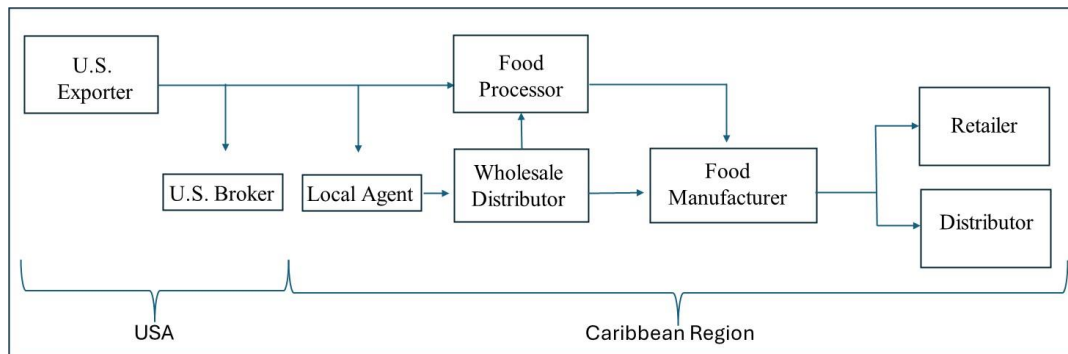
Most Caribbean countries follow international standards (e.g., Codex Alimentarius standards) and fully accept U.S. standards for food and agricultural products, including the standard U.S. nutritional fact panel. However, U.S. suppliers must be aware that the EU's Food Information to Consumers Regulation may apply to some EU Member State territories in the Caribbean. 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. Labeling and other product standards are generally enforced mostly at the port of entry. Still, routine and random checks are also conducted at the retail and wholesale channels. As always, good communication with local importers will help to ensure proper compliance with local food laws.

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: Aruba, The Bahamas, Barbados, Bermuda, Cayman Islands, Curacao, Guyana, Sint Maarten, and Trinidad and Tobago. Links to the most recent reports are also provided in Section V of this report.

B. Distribution Channels

The following visual representation is a flowchart showing how imported products tend to enter the market and move through the Caribbean distribution system, especially in markets where products are manufactured. Some larger food processing companies source directly from overseas suppliers.

Imported Food Ingredients Distribution Channel



C. 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). 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 the New York/Newark area and Philadelphia. Additionally,

U.S. ingredient suppliers can ship products to the Caribbean from various states or work with food brokers as intermediaries to facilitate the procurement of U.S. products.

E. Sector Trends

Health concerns are a significant driver of food manufacturing trends in the Caribbean. According to the International Diabetes Federation, the prevalence of diabetes in the Caribbean ranges from 5 percent in Aruba to 18 percent in Barbados, which is nearly double the global average. Furthermore, studies conducted by the University of the West Indies (UWI) estimate that approximately one in three Caribbean children is overweight or obese. In response to these issues, the Caribbean Community (CARICOM) Regional Organization has set a goal to reduce the prevalence of non-communicable diseases such as diabetes, hypertension, and cardiovascular disease. Some countries are establishing policies to improve health and nutrition, which is driving food manufacturers to consider development of new health-conscious products for the region.

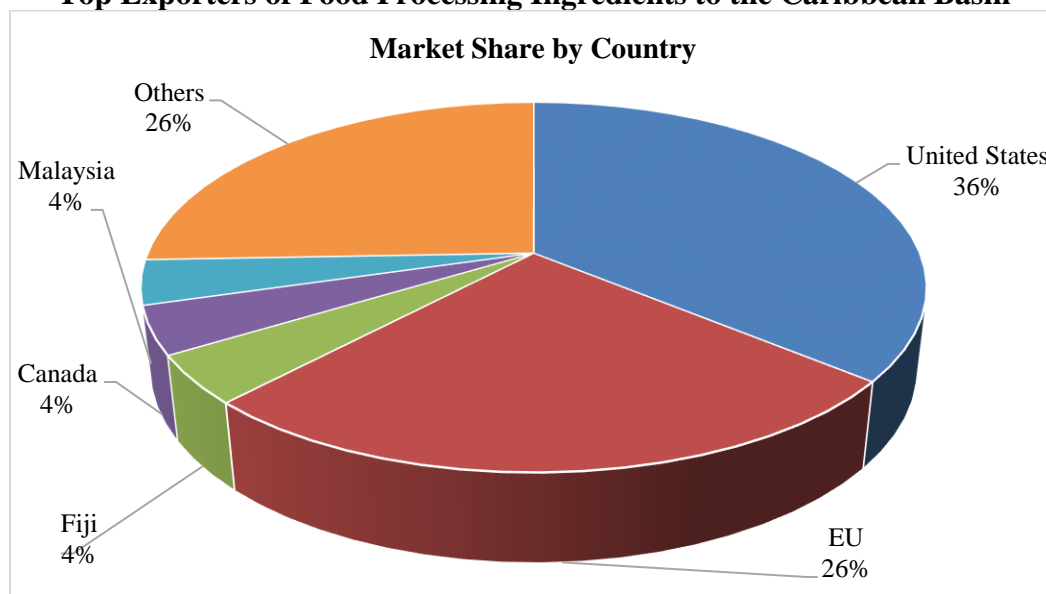
CARICOM in 2020 also set a goal to reduce the region's large food import bill by 25 percent over five years, a strategy known as "Vision 25 by 2025." Under the CARICOM Agri-Food Systems Strategy, member states were encouraged to leverage private and public sector resources to support production in key sectors, including poultry, red meat, grains, oilseeds, and vegetables. The strategy also called for members to reduce tariffs on food traded within the region, which also supports the food manufacturing sector by promoting intraregional trade. While the strategy gained some traction, CARICOM did not achieve its initial goal under the stated timeline, so they have decided to extend efforts until 2030.

Intraregional trade is expanding as consumption increases in growing economies in the Caribbean Basin. Efforts are being made to build export capacity among local companies. Some manufacturers' associations support businesses by organizing outbound trade missions to different Caribbean countries, participating in international trade shows, or hosting regional food and beverage expos. As a result, Trinidad and Tobago's exports to Guyana reached \$95.9 million, representing a 23 percent increase, while exports to Barbados amounted to \$57.3 million, up by 11 percent. Additionally, Barbados's exports to Trinidad and Tobago totaled \$10.6 million, marking an 8 percent rise, and Guyana's exports to Barbados totaled \$3.1 million, an increase of 40 percent. There is also a regional cargo ferry service between Guyana, Trinidad and Tobago, and Barbados to transport raw materials and fresh produce from producing areas to consumption and manufacturing areas.

Section III: Competition

The United States accounts for 36 percent of imported food ingredients in the Caribbean Basin, totaling \$53.3 million in 2023 (data is not yet available for all product categories and trade partners in 2024). The largest competitor is the European Union (EU), with \$38.9 million in exports (26 percent), followed by Fiji with \$6.3 (4 percent), Canada with \$6.2 million (4 percent), and Malaysia with \$5.8 million (4 percent), respectively. In the case of Fiji, exports of molasses to the region accounted for the entire value of trade, while Malaysia's exports to the region were mainly in the malt extract category. The following chart shows the top countries supplying food preparation ingredients to the Caribbean Basin by market share. As Guyana shares a border with Brazil, there is also land-based trade between the two countries, as well as plans to further develop transportation infrastructure on both sides of the border to increase trade volumes and take advantage of Brazil's vast production of grains and oilseed crops.

Top Exporters of Food Processing Ingredients to the Caribbean Basin



Data Source: Trade Data Monitor

Section IV: Best Product Prospects

A. Products Present in the 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 not elsewhere specified or included (nesoi). These 10 categories represented 92 percent of food ingredients imports from the United States.

B. Products Not Present in Market with Good Sales Potential

Supermarkets, bakery chains, and convenience stores are responding to changing consumer preferences for fresh prepared and convenience foods by increasing their offerings of ready-to-eat and grab-and-go options. This trend presents a valuable opportunity for food ingredient suppliers to expand in the region by providing product lines that include selling bulk, pre-cooked, pre-packaged, pre-cut, and ready-to-cook food options, among others, especially within the retail bakery and deli departments.

Due to the high obesity rates in many markets, Caribbean consumers are increasingly looking for healthier and more nutritious alternatives. As a result, there is a significant market opportunity for products with ingredients with low-sugar or sugar-free content, for use by manufacturers of non-alcoholic beverages, confectionery products, and snack foods.

C. Product Not Present due to Significant Barriers

The number of restricted products in the Caribbean region is minimal. The Importation of Milk (Prohibition) Act 1997 prohibits the importation of any of the following dairy products into Bermuda: raw milk, pasteurized milk, ultra-pasteurized milk, ultra heat-treated milk, and manufactured milk.

D. Top Food Processing Companies

	COMPANY	MARKET	CATEGORIES	LINK
1	Associated Brand Industries Limited	Trinidad and Tobago	Snacks, cereals, chocolates	https://abil-tt.com/
2	Baron Foods	Saint Lucia	Sauces	https://www.baronfoodsltd.com/
3	Edward Beharry Group & Company Limited	Guyana	Pasta, noodles, spices	https://beharrygroup.com/beharry_group/manufacturing
4	Goddard Group of Companies	Barbados	Bread, meat processor	https://goddardenterprisesltd.com/our-company/brands/
5	HIPAC Limited (Farmers Choice)	Barbados	Meat processor	https://hipacfoods.com/
6	National Canners Ltd (Matouk)	Trinidad and Tobago	Sauces	http://nationalcanners.com/
7	Roberts Manufacturer Co Limited	Barbados	Cooking oils, spreads, dog food	https://rmco.com/
8	SM Jaleel Limited	Trinidad and Tobago	Beverages	https://www.smjaleel.net/
9	Sterling Products Limited	Guyana	Dairy products	https://sterlingguyana.com/
10	The Pine Hill Dairy	Barbados	Dairy products	http://www.thepinehilldairy.com/

Section V: 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 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
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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

[2024 Caribbean Basin: Exporter Guide Annual](#)

The Bahamas

[Food and Agricultural International Regulations and Standards \(FAIRS\) Country Report, 2020](#)
[FAIRS Export Certificate Report, 2020](#)

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