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Bahamas - The

Post: Miami ATO

Sun is Shining on The Bahamas HRI Sector

Report Categories:

Food Service - Hotel Restaurant Institutional

Promotion Opportunities

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Report Highlights:

The strengthening Bahama's tourism sector bodes good news for U.S. food exports to CBATO's top market in the Caribbean. With nearly 80 percent of tourists to the Bahamas originate from the U.S. and with location within the U.S. telecommunications umbrella, Bahamian food service outlets and consumers readily identify with U.S. branded products. In 2015, the Bahamas imported a record US$222 million in consumer ready food products from U.S. sources.

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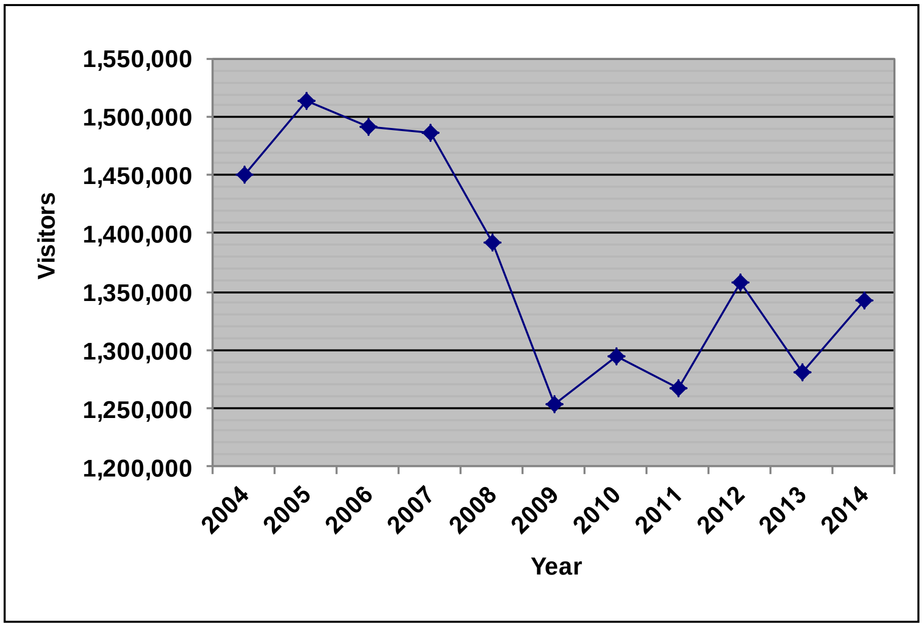
SECTION I: MARKET SUMMARY

The Bahamas is an archipelago of over 700 islands located off the southeast coast of Florida. Although only about thirty of the islands are populated, over 320,000 people are permanent residents of the Bahamas. Most of the population resides on the island of New Providence where Nassau, the capital, is located or on Grand Bahama Island. The Bahamian per capita gross domestic product (GDP) per capita (current US$) of $22,218 is among the highest in the Caribbean (2014World Bank). However, this wealth is unevenly distributed. The middle class is underdeveloped. Most Bahamians struggle with the high cost of living on the islands, as the GDP per capita number is skewed upward due to a small group of very wealthy residents. The more lucrative market in the Bahamas is the tourism sector, as the average visitor to the islands has an annual income of over $70,000.

Tourism, which constitutes over 60 percent of the national GDP, is a main driver of the food service market in the Bahamas. The Bahamas' proximity to the United States, and other Caribbean islands, offers tourists a bargain in air/sea fare and provides a very popular fishing ground for Florida boaters. While the high season of most Caribbean islands is from Thanksgiving to Easter, the popularity of the resorts and fishing in the Bahamas extends the tourist season from Thanksgiving to the end of August. This report focuses mainly on stopover visitors (air arrivals). While sea arrivals (cruise lines and private craft) bring triple the number of visitors to the islands, stopover visitors are much more important to the islands' economy as they spend five times as much as other types of tourists.

Bahamian tourism was hard hit by the Great Recession in 2008-2009. Stopover visitors fell from a high of 1.51 million in 2005 to 1.25 million in 2009, a drop of 17 percent. This combined with the loss of global tourism market share for the Caribbean as a whole (down from 2.5 percent in 2000 to 2 percent in 2013 –Nassau Guardian) reflects a struggling market. However, tourism numbers are recovering slowly from their nadir in 2009 to a respectable 1.34 million in 2014. Stop-over tourist visits from January through July 2015 show a healthy five percent expansion over the same period 2014. Furthermore, there has been a significant investment in increasing the hotel stock of New Providence. The number of rooms is set to increase by 33 percent by the end of 2016. Clearly, the Bahamians are betting on the recovery to continue and for the number of stopover visitors to continue its steady climb.

Stopover Visitors in the Bahamas: 2004-2014



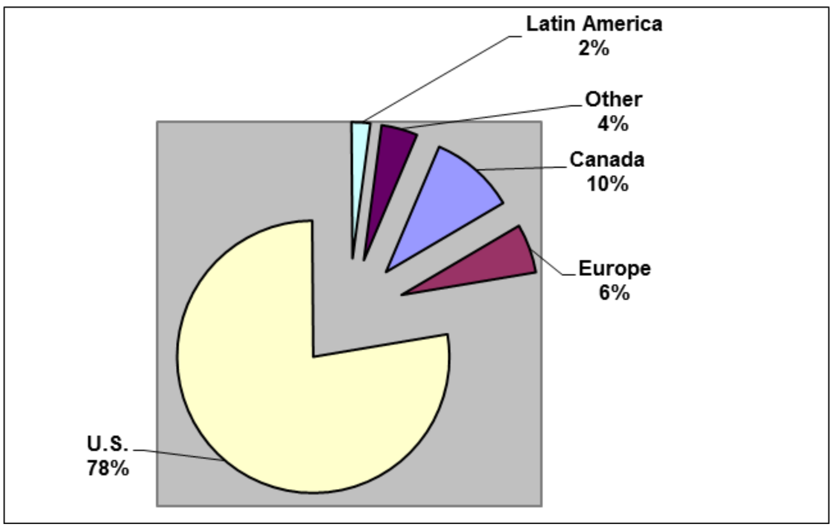
Source: Bahamas Ministry of Tourism

The Bahamian economy has finally rebounded from the global recession. Tourism, the main economic driver of The Bahamas, has shown continuing, albeit slow, signs of improvement. Numbers for 2014 (4.9 percent increase) and the first six months 2015 (5.0 percent increase over the comparable six month period in 2014) indicate a strengthening revival in stopover arrivals to the island. This despite the fact that Baha Mar, a $3.5 billion tourism development project with over 2,200 new rooms on New Providence, ultimately filed for Chapter 11 bankruptcy in summer 2015 after suffering unexpected delays. Several other new hotel projects and refurbishments on Grand Bahama, Bimini, and San Salvador were recently or are soon to be completed, and New Providence alone is to be adding 1,600 new rooms over the course of 2015-2016. These investments in the tourism infrastructure, along with an excellent international airport, maintain the Bahamas' position as tourist friendly destination. The country's economy and its continued growth are largely dependent on the tourism sector regaining its strength.

Development of the Out Islands has fueled part of the recent growth in stopover visitors. These islands have grown in popularity over the years, leveraging their remoteness to attract upscale, exclusive resorts with their pristine, deserted beaches. While the smaller, outer islands of the Bahamas, known as the "Out Islands" or "Family Islands," show tremendous promise for resorts and yachts, until transportation and logistic support to these islands improves, they will not be able to support large numbers of tourists.

Tourists from the United States accounted for 78 percent of the 1.34 million stopover visitors the Bahamas received in 2014. Moreover, total stopover visitor expenditures reached $1.9 billion in 2013 (Bahamas Ministry of Tourism). Because meals are a necessity for stopover tourists (as opposed to cruise ship passengers who eat their meals on the ship), they account for a large share of the dollars spent by tourists. Food and beverages represent the fastest growing sector in tourism.

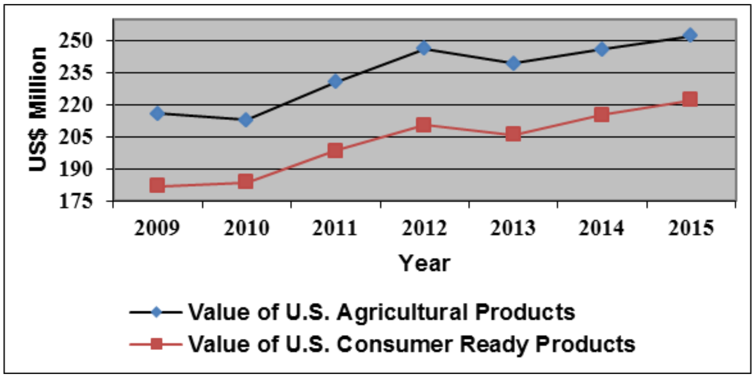
Stopover Visitors in the Bahamas by Country of Residence: 2015 (Percentage)



Source: Bahamas Ministry of Tourism

The lack of arable land for farming to support the food consumption of the local population and tourists has led to the importation of over 80 percent of the Bahamas' agricultural needs. In 2015, the United States agricultural and related products exports to the Bahamas were valued at a record $324 million (Global Trade Atlas). Of the total amount of consumer-oriented food products imported into the Bahamas, approximately half is directed toward the hotel, restaurant, and institutional (HRI) food service sector, while the remaining half is channeled toward the retail sector.

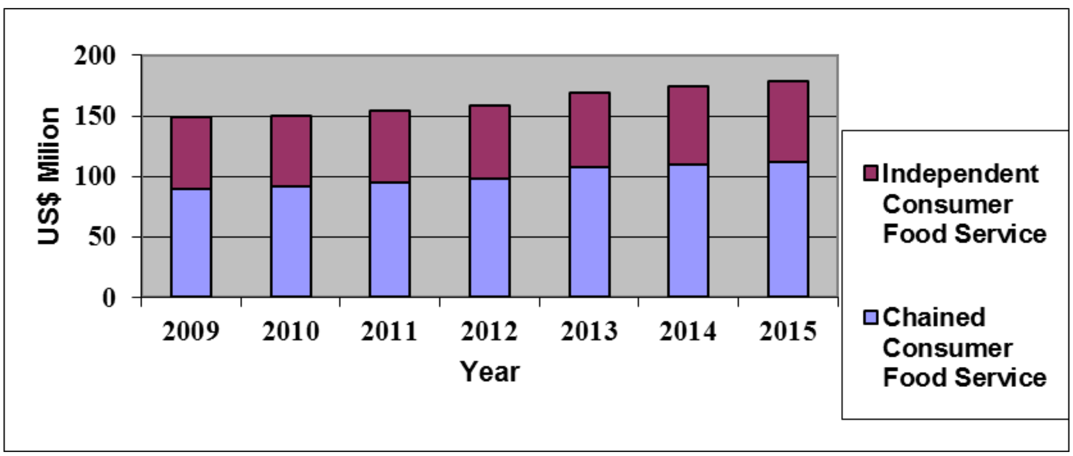
U.S. Agricultural Exports to the Bahamas: 2009-2015 (US $Millions)



Source: Global Trade Atlas

The hotel sub-sector makes up roughly 65 percent of the total HRI market, followed by the restaurant sub-sector at 32 percent, and the institutional sub-sector at 3 percent. There are 316 hotels, and over 15,300 hotel rooms in the Bahamas. Moreover, there is a wide array of restaurants located on the larger islands of the Bahamas. New Providence and Grand Bahama alone, boast more than 430 restaurants. In addition, over 20 companies provide institutional catering services in the Bahamas. While there is no data available on the value and growth of the individual HRI subs-sectors, according to Euromonitor International, the Bahamas' total consumer food service sector was valued at $174.3 million dollars in 2014, nearly a 10 percent growth from 2013. Independent food service establishments contributed approximately 37 percent of the total value of sales, while chained establishments contributed around 63 percent.

Consumer Food Service * in the Bahamas: Value 2009-2015 (US$ Millions)



* Consumer food service is composed of cafés/bars, full-service restaurants, fast food, 100 percent home delivery/takeaway, self-service cafeterias and street stalls/kiosks.

Source: Euromonitor International

Overview of the Market Advantages and Challenges Facing U.S. Exporters in the Bahamas	
Advantages	**Challenges**
The United States supplies approximately 98 percent of food products imported for the HRI sector.	In effort to promote use of local agricultural and food products, the Bahamian government uses a licensing system on the import of goods, such as whole poultry and fresh produce and will stop issuing licenses during harvest.
Approximately 78 percent of stopover tourists are from the United States.	Importers already carry many major U.S. brands and the market is already saturated with goods.
Locals are exposed to television from the United States and the commercials for American products.	Although the United States has a dominant market share, Canada, Europe, and Brazil offer competitive prices for similar quality products.
A wide range of restaurants and menus, to meet demands of tourists, requires a wide variety of products.	Large resorts and restaurant chains typically go through their corporate headquarters (the majority of which are located in the United States) to import products, making it difficult for new suppliers to penetrate the market.

SECTION II: ROAD MAP FOR MARKET ENTRY

A. ENTRY STRATEGY

U.S. exporters interested in entering the HRI food service market in the Bahamas should begin by contacting local importers (which also typically serve as wholesalers/distributors). Local importers have wide market access for imported products, have relatively large warehouse facilities which are computerized and mechanized, and possess their own fleets of trucks and vans for distribution. Most importers carry a full line of fresh, frozen, and dry products, while a few of the importers specialize in providing fresh produce, seafood, and alcoholic beverages.

The Bahamas' food and beverage importers are primarily located on the islands of New Providence and Grand Bahama. While there are approximately 30 importers of food and beverage products on these two islands, a handful of major importers dominate the distribution chain in the Bahamas' HRI sector.

Due to the geographic proximity of the United States, U.S. food products represent the majority of the foreign food products imported into the Bahamas. Bahamian importers have considerable experience dealing with U.S. companies and have extensive knowledge of the U.S. food export system. Importers hold U.S. products in high regard with respect to quality, price, and packaging.

The main method of preferred contact is through e-mail. If the importer is interested in your product, they will usually schedule an in-office appointment to talk in person. Another preferred method is through various trade shows that are well attended by Bahamian importers, as well as by restaurant and hotel management. Among the most frequented shows are the Americas Food and Beverage Show (AFB) in Miami, the Food Marketing Institute (FMI) and the National Restaurant Association Show (NRA) in Chicago. Chefs also attend some of these shows, presenting another opportunity to enter the market. Commonly, larger hotels will import directly, as well as purchase from a distributor, due to the specific request of a head chef. In some cases, the head chef will refer a potential U.S. supplier to their local importer. Negotiations can be made with either the importer or the purchasing manager depending on the circumstances. An important deciding factor for the food service industry is quality of product and reliability of supply when orders are placed.

B. MARKET STRUCTURE

Product flow for Imported Products:

The distribution network in the HRI sector of the Bahamas is comprised of the local importer and direct purchasing from the island or purchasing organization established in the United States. Smaller restaurants and hotels rely heavily on local importers for almost all of their supply. Through local importers, these establishments can source smaller quantities of a variety of items. Most often, importers in the Bahamas will use suppliers located in south Florida to consolidate shipments that amount to less than a container load of products.

The larger hotels and resorts purchase roughly 40 percent of their food and beverage needs through local importers, while 60 percent is purchased directly from U.S. suppliers. Some hotels have even positioned offices in south Florida to facilitate shipment to the seaports of the Bahamas. Moreover, the chained food service establishments located in the Bahamas typically import directly from U.S. buying offices. The restaurants and hotels located on the Out Islands struggle to procure food products at a decent price and on a timely basis. Products are typically shipped from New Providence Island to the outer islands by means of “mail boats,” or government operated barges that run from New Providence to the islands once or twice a week.

Overall, every hotel or restaurant in the Bahamas operates differently. For example, a licensed pilot who owns a hotel in the Bahamas flies weekly to Fort Lauderdale to pick up his supplies. Another hotel in Nassau, which uses local importers for the bulk of their supplies, makes monthly buying trips to south

Florida and shops in the local supermarkets for specialty items. Another small all-inclusive hotel features local seafood; however, they must supply the boat and fuel to local anglers and then pay them market price for their catch! Smaller local restaurants tend to buy from local retailers, who give them a discount.

C. SUB-SECTOR PROFILES

1. Hotels and Resorts

Selected Hotels and Resorts in the Bahamas:

Name	Location	Number Of Rooms	Purchasing Agent
Atlantis Resort	Paradise Island	4,000	Direct Import/ Local Importers
British Colonial Hilton	Nassau	291	U.S. Buying Office/ Local Importers
Four Seasons	Exuma	350	Local Importers
Our Lucaya Beach and Golf Resort	Freeport	1,271	U.S. Buying Office/ Local Importers
Sheraton Cable Beach	Cable Beach	700	Direct Import/ Local Importers
RIU	Paradise Island	400	Local Importers
Sandals Royal Bahamian Resort	Cable Beach	405	U.S. Buying Office/ Local Importers
SuperClubs Breezes	Cable Beach	400	Local Importers
Wyndham Resort and Crystal Palace Casino	Cable Beach	743	U.S. Buying Office/ Local Importers

Number of Hotels and Hotel Rooms: 2014

Source:

ISLAND	NO. OF HOTELS	NO. OF HOTEL ROOMS
Nassau, New Providence	44	3,816
Paradise Island	16	5,140
Grand Bahama	23	2,037
Out Islands	233	4,307
Total	**316**	**15,300**

Bahamas Dept. of Statistics

There are over 316 hotels and over 15,300 rooms in the Bahamas. From the mega-resorts like Atlantis and Our Lucaya, to small hotels, any style of vacation can easily be accommodated. The popularity of large resorts has risen in recent years, bringing the construction of new properties and the renovation and expansion of older properties. In addition, there has been a trend of several large resorts offering optional all-inclusive packages.

Despite the great buying power of accommodation establishments of this size, local importers, which also serve as wholesalers/distributors, remain an important source due to both the ever-changing needs and limited storage space for dry and refrigerated goods of these establishments. Moreover, by using local importers for perishable products such as fresh produce, these establishments do not need to worry as much about spoilage as they would by importing directly from the United States.

Atlantis, a Kerzner International resort located on Paradise Island, is the largest hotel in the Bahamas. The resort's billion-dollar, third phase of expansion was completed in 2007. Included in the third phase expansion project are a 21-story hotel with 600 suites and a 21-story condominium/hotel tower with nearly 500 units. Atlantis now has a room inventory of approximately 4,000 rooms and over 50 food outlets on its property. Atlantis also recently expanded its warehouse storage to 50,000 square feet, of which 45 percent is refrigerated storage and the remaining is dry storage.

The Cable Beach hotel strip in Nassau is also currently undergoing a major transformation. Baha Mar Development Company's $3.5 billion resort development project included a high-stakes casino, and four different hotels, all arrayed along the coast. Unfortunately, the project has been put on hold indefinitely. Construction, which began in 2007, was scheduled to finish in late 2014; however, in that interval there has been a falling out between the two major investors. What was once touted as the future premier destination of Caribbean now sits empty tourism (though reportedly 97 percent complete) while its owners mull over bankruptcy proceedings initiated in June 2015.

In addition to these projects on Paradise Island and New Providence Island, there are two large-scale development projects taking place on Grand Bahama Island, and another half dozen development projects (with 200 rooms or less) in the works in the outer islands of the Bahamas.

2. Restaurants

Selected Restaurants in the Bahamas:

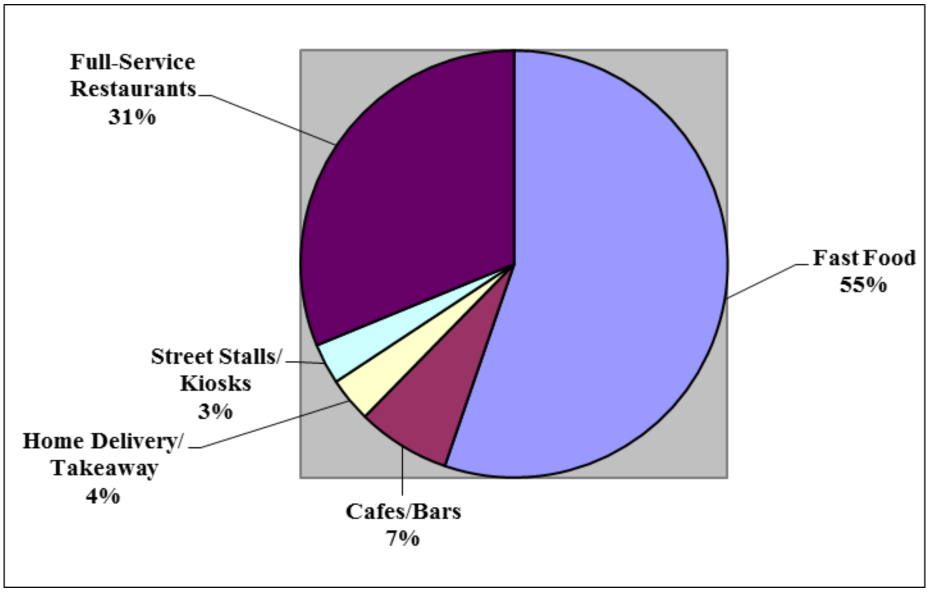
Name	Location	Type Of Cuisine	Purchasing Agent
Cally's Restaurant	Port Lucaya	Greek	Local Importer
Capriccio	Cable Beach	Italian	Local Importer
Cricket Club	Nassau	Bahamian/English	Local Importer
Europe Restaurant	Nassau	German	Local Importer
Flying Fish Restaurant	Port Lucaya	Contemporary/ Bahamian	Local Importer
Gaylord's	Nassau	Indian	Local Importer
Graycliff Hotel and Rest.	Nassau	French	Local Importer
Harbour Lobster & Fish Co.	Port Lucaya	Caribbean	Local Importer
House of Wong	Nassau	Chinese	Local Importer
Ruby Swiss	Freeport	Seafood/ Bahamian	Local Importer
The Poop Deck	Nassau	American/Bahamian	Local Importer

Most restaurants turn to local importers, which also serve as wholesalers/distributors, to source their imported food and beverage supply, while the majority of the seafood, bottled beverages, and seasonal fruits and vegetables tend to be bought directly from vendors on the island. For the most part, customers do not inquire about the brands used in their dishes; nevertheless, they expect the quality of products to be on the same level as those offered in U.S. restaurants.

Nassau and Freeport offer a wide variety of restaurants, ranging from upscale to fast food, and cuisine that reflects American, Bahamian, and international cultures. Local chains of restaurants mainly consist of Chinese and Bahamian cuisine and seafood. The independent restaurants in Nassau, which are located outside hotels, do not experience much decline in clientele in the low season (which lasts from April to August) because local residents also frequent these establishments. Even centrally located restaurants have only around 60 percent tourist clientele. The increase in per capita GDP and employment of women in the workforce has facilitated the spread of fast food eateries across urbanized areas. Kentucky Fried Chicken, McDonald's, Burger King, Wendy's Domino's Pizza, Carl's Jr., Dunkin Donuts, and Subway, typically import directly from U.S. buying offices. Shopping center developments near resorts like Atlantis and Our Lucaya also provide prime locations for independently owned restaurants. These restaurants have about 70 percent tourist clientele and rely heavily on local importers to provide their food and beverage supplies.

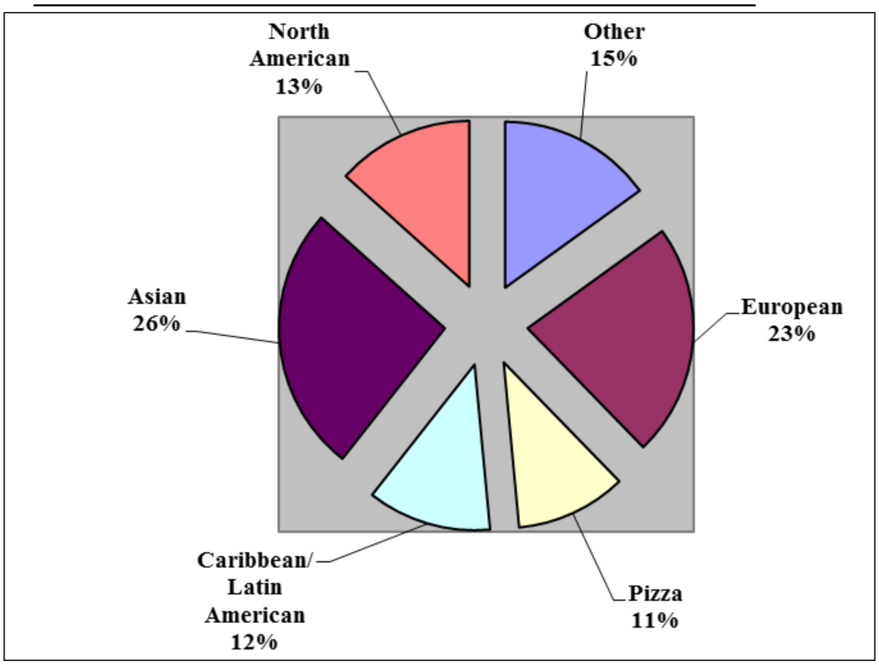
In 2014 fast food restaurants accounted for the largest percentage of consumer food service sales in the Bahamas with 56 percent of the market, followed by full-service restaurants with 31 percent, cafes and bars with 7 percent, home delivery/takeaway with 3 percent, and street stalls/kiosks with 3 percent of the market. Additionally, in 2014, pizzerias contributed 11 percent of the total full-service restaurant sales, followed by North American restaurants with 13 percent, Asian restaurants with 26 percent, European restaurants with 23 percent, and Caribbean/Latin American restaurants with 12 percent (Source: Euromonitor International).

Consumer Food Service Sales in the Bahamas by Category: 2014 (Percentage)



Source: Euromonitor International

Full-Service Restaurants in the Bahamas by Category: 2014 (Percentage)



Source: Euromonitor International

3. Institutional

The institutional sector involves distribution to the prisons, hospitals, nursing homes, schools, and entertainment facilities such as arenas and stadiums. It accounts for less than 3-4 percent of the HRI trade and is supplied by the local importers and to a lesser extent, one wholesale club outlet in Nassau. Many of the local importers are involved in supplying the local banks, hospitals, and other institutions with a coffee program. In addition, over twenty companies provide catering services in the Bahamas. These businesses mainly buy food products from local wholesalers and seafood from local fisheries. However, airline caterers that service carriers with flights to both Nassau and Freeport airports directly import food and beverage products from the United States.

SECTION III: COMPETITION

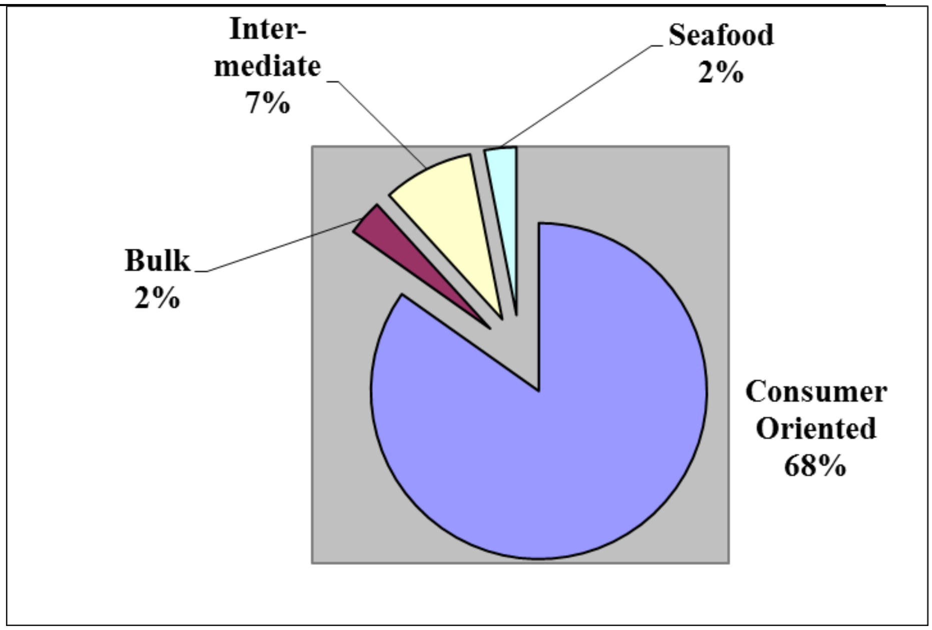
Concerning local competition, there are approximately 20 food and beverage processors of notable size located in the Bahamas. Approximately 50 percent of these processors are manufacturers of soft drinks and producers of mineral water. The remaining 10 processors specialize in the production of fish and fish products, poultry, fruit and vegetable products, dairy products, and sugar products. No beef or pork is produced locally, and only one major poultry producer remains. Two local seafood companies meet most of the demand for some types of seafood like grouper, lobster, and shrimp. In regards to the supply of local produce, the fruit and vegetable crop is seasonal and inconsistent in quality and quantity. However, in an effort to promote the use of local agricultural and food products, specifically produce and poultry, the Bahamian government uses a licensing system on the import of such goods. While the quantities of local food and agricultural production are low, any influence due to local competition is minimal. Yet, it is important to point out those producers of local water and soft drinks in Nassau and Grand Bahama account for most of the supply for their respective markets.

The competition with other nations varies between product categories. In 2014, the United States had a 90+ percent market share in almost all major product categories (Bahamas Department of Statistics). However, it is important to note that many products from other countries are transshipped through the United States. The close proximity of the United States to the Bahamas allows for quicker and less expensive means of transport of U.S., as well as other foreign products. Nevertheless, it is assumed that the United States dominates in all major food categories. It is also important to point out that the Bahamas also imports a substantial amount of food products from Panama, Puerto Rico, and the Netherlands Antilles (St. Maarten). The geographic proximity of Puerto Rico, and the duty-free status of St. Maarten and Panama, makes these locations prime distribution hubs for food products originating from around the world.

In 2015, the United States exported approximately $324 million worth of food, agricultural, and seafood products to the Bahamas. Of this amount, consumer-oriented agricultural products comprised roughly 68 percent, bulk products comprised 2 percent, intermediate agricultural products comprised 7 percent, seafood products comprised 2 percent, and other agricultural related products comprised 20 percent. U.S. trade statistics illustrate that in 2015 the United States exported approximately $222.1 million of consumer-oriented agricultural products and $8.1 million worth of edible fish and seafood products to the

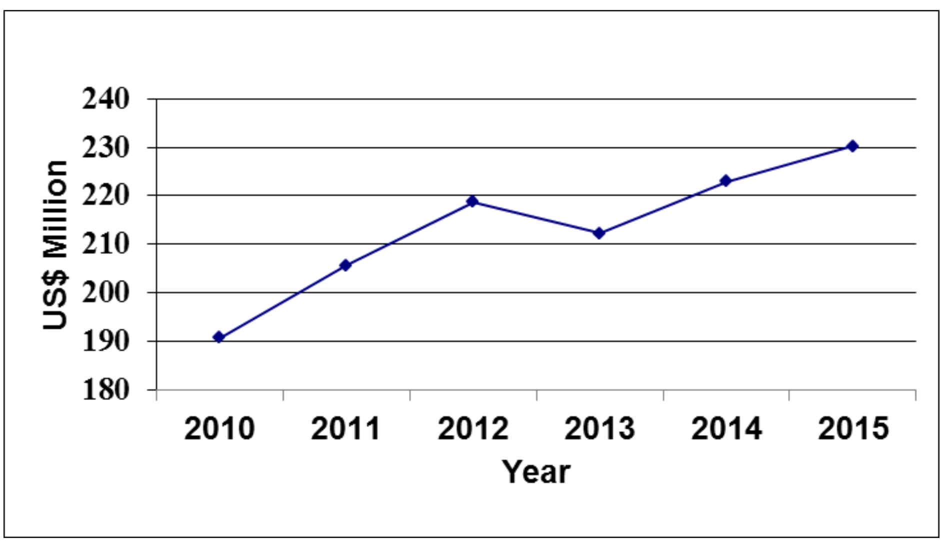
Bahamas.

Exports of U.S. Food and Agricultural Products to the Bahamas by Category: 2015 (Percentage)



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

Exports of U.S. Consumer-Oriented Agricultural and Edible Fish & Seafood Products to the Bahamas: 2010-2015 (US$ Millions)



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

Overview of the Competitive Situation Facing U.S. Products in the Bahamas			
PRODUCT CATEGORY	**IMPORT VALUE (MILLION) (2014)**	**U.S. MARKET SHARE (PERCENT) (2014)**	**OTHER EXPORTERS**
Red Meats (fresh, chilled, and frozen)	$54.4	81	Beef: Australia, Panama, U.K. Lamb: Australia
Fish and Seafood Products	$24.8	76	Thailand, Canada, Vietnam, France
Poultry Meat	$45.5	64	Tajikistan, Brazil, China, Canada, Luxembourg
Dairy Products	$47.3	80	Peru, Dominican Republic, U.K., Ireland, France, Netherlands, Brazil, Trinidad & Tobago
Fresh Vegetables	$32.6	99.11	Netherlands, Luxembourg, Canada
Fresh Fruit and Tree Nuts	$34.3	99.71	Luxembourg
Processed Fruit & Vegetable Products	$28.4	80	Canada, Niger, Belgium, Ecuador, China
Processed Cereal, Flour, & Rice	$31	46	China, Canada, Benin, U.K., France
Snack Foods	$15.6	88	U.K., Malaysia, Netherlands
Wine & Beer	$23.3	65	France, Chile, Italy
Coffee, Tea, and Spices	$1.9	93	U.K., Poland, Jamaica
Sugars and Sugar Confectionery	$9.2	57	Costa Rica, Canada, Colombia

Source: Global Trade Atlas

SECTION IV: BEST PRODUCT PROSPECTS

A. Products present in the market that hold good sales potential:

Product Category	EXPORT VALUE ($ MILLION) (2015)	5-YR. AVG. ANNUAL EXPORT GROWTH (PERCENT)
Poultry Meat	$27.3	3
Red Meats (fresh, chilled, and frozen)	$24.7	22
Snack Foods	$19.9	28
Fruit and Vegetable Juices	$15.4	12
Prepared Food	$15.2	19
Wine and Beer	$11.6	49
Fish Products	$8.1	13
Non-Alcoholic Beverages	$9.0	80
Processed Fruit	$1.9	36
Tree Nuts	$0.7	40

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

B. Products not present in significant quantities but which have a good sales potential:

The Bahamas has a wide variety of products available. However, importers and consumers are always interested in new food and beverage alternatives.

C. Products Not Present Because They Face Significant Barriers:

In an effort to promote the use of local agricultural and food products, the Bahamian government uses a licensing system on the import of goods such as whole poultry and fresh produce. However, there is sufficient demand to allow certain quantities to remain in the market.

SECTION V: POST CONTACT AND FURTHER INFORMATION

A. For More Information, Please Contact:

Caribbean Basin Agricultural Trade Office
United States Department of Agriculture
909 SE 1st Ave, suite 720
Miami, Florida 33131
Phone: (305) 536-5300
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Staff Contacts:
Michael Henney, Director
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Richie Koch, Intern, International Agricultural Internship Program

Please visit our website for promotional activities, trade statistics, and more reports on the retail and food service sectors and on food import regulations for several Caribbean islands.
Website: http://www.cbato.fas.usda.gov

Basic country information may be found in the Central Intelligence Agency's World Fact Book under the Bahamas
Website: http://www.odci.gov/cia/publications/factbook

Department of Commerce
U.S. Commercial Service
Information on marketing U.S. products and services is in the Country Commercial Guide for the Bahamas
Website: http://www.export.gov
Click on Market Research link, and then click on Market Research Library

B. Other sources of Information on the Bahamas:

American Embassy of the Bahamas
Economic/Commercial Section
P.O. Box N-8197
Nassau, Bahamas
Phone: (242) 322-1181
Fax: (242) 328-3495

Bahamas Department of Statistics
Clarence A. Bain Building
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Fax: (242) 502-4220
Website: www.bhahotels.com

Bahamas Ministry of Tourism
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Website: www.bahamas.gov.bs/customs/

Bahamas Chamber of Commerce
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