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Caribbean Basin

Exporter Guide

Caribbean Basin Exporter Guide

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Report Highlights:
Over the past 11 years (2004-2013) U.S. exports to the Caribbean Island Basin of consumer-oriented products and fish products have averaged over 10 percent annual growth. In 2014, such product exports are on target to exceed $1 billion, setting a new record in the process. With little agricultural production of their own, Caribbean island nations rely heavily on imported food products, particularly from the United States. This report aims to provide U.S. suppliers general information on opportunities in the Caribbean Basin and how to best approach this diverse and dynamic market.

Post:

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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, Curacao, Dominica, Grenada, Guadeloupe, Martinique, Montserrat, the Caribbean Netherlands or BES Islands (Bonaire, Sint Eustatius and Saba), Saint Barthélemy, Saint Kitts and Nevis, Saint Lucia, Saint Martin, Saint Vincent & the Grenadines, Sint Maarten, Trinidad and Tobago, and Turks and Caicos Islands. The Office of Agricultural Affairs based in Santo Domingo covers the islands of Hispaniola and Jamaica.

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. These island nations must import the majority of their food requirements due to production constraints - insufficient arable land, scant water resources available on some islands, no economies of scale, and a limited food-processing sector. Due to familiarity, the 3.9 million island residences hold strong appeal for U.S. products. Annually between six and seven million stop-over tourists (over half of which are from the United States) visit the region which also helps spur the Caribbean food service sector’s demand for U.S. ingredients.

The United States is the largest supplier to the Caribbean of food products, largely in part on the strength of these favorable conditions. In 2013, the United States exported a record high $925 million worth of consumer-oriented products to the region, capping 11 years of consecutive growth in that category. Preliminary 2014 data indicate this upward trend continuation, with January-September data showing consumer-oriented product exports to the Caribbean increasing five percent over the same period 2013. Consumer-oriented products account for over 60 percent of U.S. agricultural and related product exports to the Caribbean, with poultry meat & products (excluding eggs), dairy products, prepared foods, snacks, and beef & beef products, rounding out the top five export categories. In 2013, the United Stated also exported $35 million worth of fish products to the region, which is on target in 2014 to top $40 million.

The Caribbean market is witnessing increasing completion from Europe, Canada, South and Central America. While the United States still enjoys several major location advantages, U.S. suppliers should remain mindful that in coming years rising competition will necessitate closer market monitoring in order to capitalize on emerging market opportunities around the region.

Section I. Market Overview

The small economies of the Caribbean, which are highly vulnerable to any external shocks, continue to struggle in the wake of the global economic recession in the late 2000's which curtailed tourist activity, dried up worker remittances, reduced foreign direct investment to the region, and softened demand for Caribbean exports. Beginning in 2010 the region began to show signs of economic recovery, but growth has been quite modest. High public debt, fragile financial systems, and weak competitiveness are keeping economic activity in check in many islands. According to the UN Economic Commission for Latin America and the Caribbean (ECLAC), in 2013 real GDP growth ranged from (-0.7) percent to 2.1 percent in nine of the island markets covered by the CBATO.

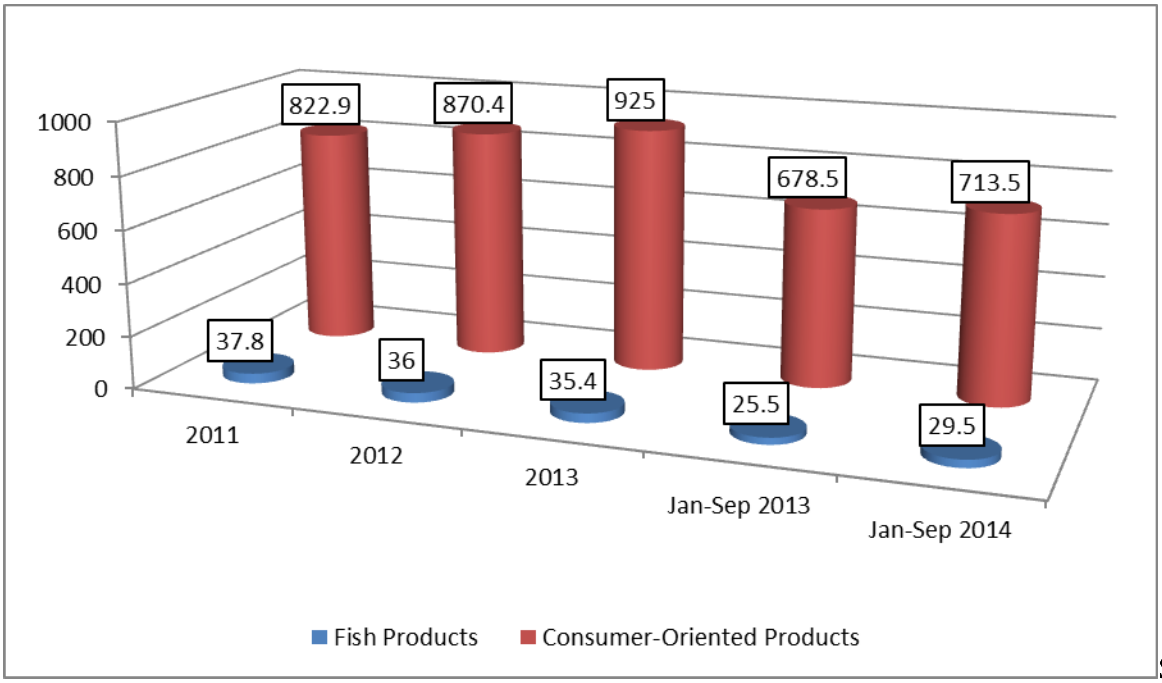
The outlook for 2014 is one of improved, albeit tepid growth for the region. Improving worldwide economic conditions, particularly in advanced economies which generate most tourist flows to the Caribbean, could have a positive ripple effect in the tourist-dependent islands of the Caribbean. In fact, after several years of meager and uneven growth in tourist activity, things are starting to look up. According to the Caribbean Tourism Organization, preliminary data for the first 6 months of 2014 showed that arrivals to the Caribbean remained buoyant, registering a 4.3 percent increase when compared to the same period last year."

While the region's economic recovery remains somewhat fragile, 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 3.9 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. The regulatory environment in the islands is also quite receptive toward U.S. products.

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 2013, the United States exported a record high $925 million worth of consumer-oriented products to the region, capping 11 years of consecutive growth in the category. Preliminary data indicate a continuation of this upward trend in 2014, with January-September exports of consumer-oriented products to the Caribbean increasing by 5 percent from the same period in 2013. Consumer-oriented products account for over 60 percent of U.S. agricultural and related product exports to the Caribbean, with poultry meat & products (excluding eggs), dairy products, prepared food, snacks, and beef & beef products rounding out the top five export categories. In 2013, the United Stated also exported $35 million worth of fish products to the region, which could near $40 million in 2014.

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

(Millions of Dollars)



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.
Although growth in tourism remains weak and uneven, the sector as a whole is inching forward 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 approximately 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 2015, 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. In doing so, it is important 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, Cayman Islands, Cuba, Curacao, Sint Maarten, and Trinidad and Tobago.

Section III. Market Sector Structure and Trends

A. HRI Food Service Sector

As mentioned earlier, tourism is expected to remain sluggish for the foreseeable future. However, one positive development is the considerable investment in tourism infrastructure that has taken place 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 gaming resort 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 $3.5 billion, 1,000 acre development will be located 5 miles west of Nassau along a half mile stretch known as Cable Beach. Construction of the project is well underway and is expected to be completed in 2015. When finished, Baha Mar will include four resort hotels, the Caribbean's largest casino, The Bahamas' largest convention center, and 20 full-service restaurants and bars among other attractions. In an effort to capitalize on the Chinese and Asian outbound tourism trend, Baha Mar is setting up an office in Hong Kong's business district. They plan to court Asian tourists by promoting Baha Mar as an Asia-friendly destination. Bahamian tourism and demand for U.S. foods are expected to increase accordingly. U.S. suppliers of Asian style products may find Bahamian importers increasingly interested in their products if Bahama is successful at attracting large numbers of Asian tourists. For more information see the following GAIN report: Tourism Development Spells Good News for U.S. Suppliers.

Overall, the Caribbean HRI food service sector is estimated to account for roughly 35 to 45 percent of consumer-oriented 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, Barbados, Bermuda, and Sint Maarten/St. Martin. 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: Cayman Islands (2013), Trinidad and Tobago (2012), The Bahamas (2011), Bermuda (2010), Eastern Caribbean (2009), Netherlands Antilles (2008).

B. Retail Sector

An estimated 55 to 65 percent of consumer-oriented agricultural imports in the Caribbean are destined for the retail sector. Most of the products stocked on the shelves of Caribbean retail stores are imported.

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 (Canada), 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 five 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.

For more information on this sector, see the following GAIN retail sector reports for the Caribbean Basin: Cayman Islands (2013), Trinidad and Tobago (2012), 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 less than a quarter of U.S. agricultural and related 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	2013 Market Size* (Volume)	2013 Imports* ($1,000)	5-Yr. Avg. Annual Imp Growth* (%)	Import Tariff Rate ** (%)	Key Constraints Over Market Development	Market Attractiveness for USA
Wine & Wine Products	No local production	30,179	9	5-60 in most islands	Strong competition, particularly from Europe, Chile & Argentina	Consumer-oriented product demand should continue strong, albeit tempered by overall economic conditions.
Pork & Pork Products	Min. Local Production	42,185	9	0-40 in most islands	Select countries have domestic purchase requirements. Retail market is a niche market, subject to health of the economy. HRI market depends on tourism.	Consumer-oriented product demand should continue strong, albeit tempered by overall economic conditions.
Beef & Beef Products	Min. Local Production	71,540	8	0-40	Retail market is a niche market, subject to health of the economy. HRI market depends on tourism.	Consumer-oriented product demand should continue strong, albeit tempered by overall economic conditions.
Dairy Products	Min. Local Production	89,350	5	0-20	Retail market is a niche market, subject to health of the economy. HRI market depends on tourism.	Attractive to U.S. suppliers with market driven approach to business in the Caribbean.
Snack Foods	Min. Local Production	73,234	4	0-20	Retail market is a niche market, subject to health of the economy. HRI market depends on tourism.	Consumer-oriented product demand should continue strong, albeit tempered by

						overall economic conditions.
Prepared Food	Min. Local Production	87,048	6	0-20	Retail market is a niche market, subject to health of the economy. HRI market depends on tourism.	Consumer-oriented product demand should continue strong, albeit tempered by overall economic conditions.
Poultry Meat	Min. Local Production	152,116	7	0-40 in most islands	Some domestic production (i.e. T&T, Barbados, St. Lucia). Retail market is subject to health of the economy. HRI market depends on tourism. Proposed increase in CARICOM's common external tariff for poultry products could become a major constraint for U.S. suppliers.	Consumer-oriented product demand should continue strong, albeit tempered by overall economic conditions.

*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.

Some other product categories with excellent 5-year average annual growth in U.S. exports include tree nuts (14 percent), processed vegetables (11 percent), eggs & products (10 percent), and fresh vegetables (9 percent).

Section V. Key Contacts and Further Information

A. For more information, please contact:

Caribbean Basin Agricultural Trade Office
Foreign Agricultural Service
United States Department of Agriculture
909 SE 1st Ave, Suite 720
Miami, Florida 33131
Phone: (305) 536-5300
Fax: (305) 536-7577
Email: atocaribbeanbasin@fas.usda.gov
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Michael T. Henney, Director
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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 country fact sheets as well as valuable information on travel & business in foreign countries and on U.S. Embassies and Consulates around the world.

http://www.state.gov

Central Intelligence Agency

The CIA's on-line World Fact book 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 CBATO'S islands of coverage. Some variations, depending on the agency compiling data, will exist in the tables provided.

Table A. Key Caribbean Basin Trade and Demographic Information

Agricultural Imports From All Countries ($Mil) / U.S. Market Share (%) 1/	$2,733/ 53.7
Consumer Food Imports From All Countries ($Mil) / U.S. Market Share (%) 1/	$1,601/ 53.3
Edible Fishery Imports From All Countries ($Mil) / U.S. Market Share (%) 1/	$150/ 23.5
Total Population (Millions 2/) / Annual Growth Rate (%)	3.9 / Range: (-0.29) to 2.58
Urban Population (Millions 2/) / Annual Growth Rate (%)	2.1/ Range: 3.1 to 2.2
Number of Major Metropolitan Areas 3/	0
Size of the Middle Class (Millions) / Growth Rate (%)	N/A
Per Capita Gross Domestic Product (ppp, U.S. Dollars)	Range: $8,500 to $86,000
Unemployment Rate (%)	Range: 5.0 to 29.1
Per Capita Food Expenditures (U.S. Dollars)	N/A
Female Population Employed (%) 4/	Range: 36.4 to 63.8
Exchange Rate (US$1 = Caribbean country's currency)	Varies by Country

Footnotes:

1/ 2013 global export value to the CBATO islands of coverage based on reporting countries export statistics as compiled by the Global Trade Atlas database.

2/ 2014 mid-year estimates

3/ Populations in excess of 1,000,000

4/ Female population employed as a percentage of working age (15-64) female population.

Source: CIA World Fact book, Global Trade Atlas, and Euromonitor.

Table B. Consumer Food and Edible Fishery Product Imports

(U.S. Dollars)

	2011	2012	2013	% Change 2013/2012
Consumer Oriented Agric. Total	1,520,056,618	1,546,263,700	1,601,070,403	3.54
Chicken Cuts And Edible Offal (Inc Livers), Frozen	112,709,713	121,272,847	140,244,929	15.64
Food Preparations Nesoi	84,609,681	87,702,993	98,168,946	11.93
Cheese, Nesoi, Including Cheddar And Colby	72,734,941	68,925,830	74,299,020	7.8
Meat Of Bovine Animals, Boneless, Frozen	54,476,930	60,076,834	55,420,669	-7.75
Wine, Fr Grape Nesoi & Gr Must W Alc, Nov 2 Liters	49,307,853	51,814,325	52,909,564	2.11
Bread, Pastry, Cakes, Etc Nesoi & Puddings	41,945,149	48,506,791	51,446,416	6.06
Potatoes, Prepared Etc., No Vinegar Etc., Frozen	26,054,586	31,338,988	41,714,289	33.11
Waters, Incl Mineral & Aerated, Sweetnd Or Flavord	42,517,971	36,958,922	38,686,750	4.67
Nonalcoholic Beverages, Nesoi	28,846,719	32,544,575	35,896,477	10.3
Beer Made From Malt	32,860,354	31,313,732	31,493,226	0.57
Meat Of Swine, Nesoi, Frozen	24,282,191	25,521,694	27,923,183	9.41
Mlk/Cream Cnctrd Nt Swtn Pwd/Oth Solids Ov 1.5% Fa	30,692,304	27,525,295	27,720,941	0.71
Sauces Etc. Mixed Condiments And Seasonings Nesoi	29,695,447	27,902,603	26,859,798	-3.74
Malt Extract; Flour, Meal, Milk Etc Prod Etc Nesoi	22,205,739	22,035,734	24,898,684	12.99
Dog And Cat Food, Put Up For Retail Sale	20,076,987	24,399,790	23,757,459	-2.63
Cookies (Sweet Biscuits)	21,356,024	22,747,501	23,128,716	1.68
Food Preparations For Infants, Retail Sale Nesoi	24,389,679	21,465,351	22,551,151	5.06
Meat Of Sheep, Cuts With Bone In, Nesoi, Frozen	26,083,047	20,501,259	22,091,819	7.76
Prep Food, Swelling/Roasting Cereal/Cereal Product	15,979,940	17,806,893	18,706,379	5.05
Potatoes, Except Seed, Fresh Or Chilled, Nesoi	18,225,690	13,703,076	18,479,765	34.86
Milk And Cream, Concentrated, Not Sweetened, Nesoi	25,902,463	23,133,808	18,261,253	-21.06
Sausages, Similar Prdt Meat Etc Food Prep Of These	15,659,387	16,587,749	17,249,915	3.99
Meat Of Bovine Animals, Boneless, Fresh Or Chilled	13,929,098	16,078,856	17,127,948	6.52
Other Consumer-Oriented Products	685,514,725	696,398,254	692,033,106	0.63
Fish & Seafood Products	168,598,812	373,368,490	149,768,916	-59.89
GRAND TOTAL	1,688,655,430	1,919,632,190	1,750,839,319	-8.79

* Because import data for all Caribbean Basin countries are not available, the above numbers represent global export value to the CBATO islands of coverage based on reporting countries export statistics as compiled by the Global Trade Atlas database.

Source: Global Trade Atlas.

Table C. Top 15 Suppliers of Consumer Foods and Edible Fishery Products

Consumer-Oriented Agricultural Imports*, US$

	2011	2012	2013	Market Share (%)
USA	767,594,075	811,299,301	853,860,062	53.3
New Zealand	96,439,803	85,166,736	86,758,879	5.4
Canada	59,674,034	55,887,478	73,749,788	4.6
Netherlands	74,627,650	71,259,322	71,155,781	4.4
Brazil	58,450,887	65,164,746	63,695,860	4.0
United Kingdom	44,807,388	47,025,371	54,631,228	3.4
Costa Rica	39,773,664	36,165,890	42,200,083	2.6
Jamaica	28,810,087	28,012,543	30,684,961	1.9
France	25,074,822	28,078,643	27,741,687	1.7
Barbados	17,055,183	18,317,131	19,713,087	1.2
Ireland	16,427,740	19,426,586	18,774,670	1.2
Australia	21,972,051	16,852,113	18,114,732	1.1
Mexico	11,346,430	15,026,228	17,402,785	1.1
Italy	12,753,802	14,016,192	17,071,810	1.1
Chile	15,635,761	14,151,179	16,147,747	1.0
Other	229,613,241	220,414,241	189,367,243	11.8
TOTAL	1,520,056,618	1,546,263,700	1,601,070,403	100.0

* Because import data for all Caribbean Basin countries are not available, the above numbers represent global export value of consumer-oriented products to the CBATO islands of coverage based on reporting countries export statistics as compiled by the Global Trade Atlas database.

Table C. Top 15 Suppliers of Consumer Foods and Edible Fishery Products, (Continued)

Fish & Seafood Product Imports*, US$

	2011	2012	2013	Market Share (%)
USA	35,609,458	36,270,247	35,263,182	23.5
Canada	17,351,470	17,899,706	17,553,764	11.7
Thailand	13,185,267	15,856,391	12,316,217	8.2
Norway	11,074,890	9,563,347	12,013,247	8.0
Belize	2,016,663	4,336,897	9,315,459	6.2
China	4,487,094	5,618,733	8,144,462	5.4
Guyana	6,163,602	6,540,530	7,295,274	4.9
Peru	6,041,749	4,154,486	6,877,793	4.6
Japan	261,624	305,281	5,956,294	4.0
Taiwan	5,629,858	5,881,432	5,033,667	3.4
India	3,634,231	3,876,624	4,502,040	3.0
Brazil	7,369,177	3,541,510	4,281,189	2.9
Philippines	823,674	1,566,198	2,809,793	1.9
Indonesia	2,697,715	2,233,229	2,691,311	1.8
South Korea	781,497	1,010,530	2,395,190	1.6
Other	51,470,843	254,713,349	13,320,034	8.9
TOTAL	168,598,812	373,368,490	149,768,916	100.0

* Because import data for all Caribbean Basin countries are not available, the above numbers represent global export value of fish and seafood products to the CBATO islands of coverage based on reporting countries export statistics as compiled by the Global Trade Atlas database.

Source: Global Trade Atlas.

Table D. U.S. Exports of Consumer Food and Edible Fishery Products to the Caribbean

(Thousands of U.S. Dollars)

	2011	2012	2013	2013 (Jan-Sept)	2014 (Jan-Sept)
Consumer Oriented Total	823,498	870,557	925,043	678,523	713,508
Poultry Meat & Prods. (ex. eggs)	135,534	141,168	152,116	111,241	105,847
Dairy Products	88,571	88,635	89,350	67,645	73,184
Prepared Food	66,064	74,997	87,048	65,361	65,000
Snack Foods NESOI	64,771	74,534	73,234	56,153	57,781
Beef & Beef Products	70,542	75,627	71,540	52,476	59,414
Non-Alcoholic Bev. (ex. juices)	39,682	45,382	52,259	39,148	40,012
Fruit & Vegetable Juices	45,039	43,891	43,932	33,214	31,123
Wine & Beer	35,842	39,777	43,888	31,229	41,011
Pork & Pork Products	39,853	38,780	42,185	28,119	32,963
Fresh Fruit	28,966	30,899	34,701	23,298	25,825
Processed Vegetables	29,526	30,975	31,541	22,921	25,300
Dog & Cat Food	24,580	27,430	29,255	22,857	21,885
Fresh Vegetables	25,986	20,960	29,244	21,103	24,215
Condiments & Sauces	25,146	27,170	27,851	20,518	22,807
Eggs & Products	20,718	21,555	25,722	18,406	22,684
Other Consumer Oriented	17,051	18,538	19,096	13,213	11,910
Chocolate & Cocoa Products	18,149	19,910	18,393	13,422	13,537
Breakfast Cereals	15,171	16,762	18,343	13,762	12,158
Meat Products NESOI	15,096	13,999	12,391	9,026	11,436
Tree Nuts	9,170	9,634	12,343	8,019	8,383
Processed Fruit	8,045	9,933	10,611	7,392	7,032
Fish Products	37,759	36,006	35,211	25,489	29,460
GRAND TOTAL	861,257	906,563	960,254	704,013	742,968

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