



DOING BUSINESS IN ARUBA

Population 125K| GDP Growth 4.3% (*est. 2023) | GDP PC \$40K |
Still Wine Imports 163K 9 lt cs

Economy: Tourism is the economic driver growing 7% in 2025. Expansion of Secrets Hotel and new construction (Iberostar, St Regis) will contribute to bring more visitors. Cautious spending by arriving tourist, increasing consumption of spirits and beer while seeing total wine market contraction (-4% 2025 vs 2024). More direct flights will support tourism growth. Aruba’s tourist high season (December – April) is paramount attain volumes in the market.

Wine in Aruba

Total Addressable Market

Most distributors forecast category growth fueled by increased tourism. Total Still Wine Category 163K 9lt cases, led by US with 67K cs(-15%) followed by Chile 35K cs (+6%) and Argentina 20K cs(-1%) .

Consumption Trends

Wine consumption mirrors US trends losing share to beer and spirits.
New World Wine varieties:

Varietal	2024	2025	Share %	YoY Change %
Merlot	24	25	19.3%	3.4%
Chardonnay	20	20	15.8%	2.9%
Cabernet Sauvignon	18	18	14.2%	2.1%
Sauvignon Blanc	17	17	13.0%	-1.3%
Pinot Gris/Pinot Grigio	14	14	11.0%	2.2%
Malbec	8	6	4.9%	-25.5%
Pinot Noir	5	5	4.0%	5.1%
Zinfandel	4	4	2.7%	-6.7%
Shiraz/Syrah	3	3	2.1%	-11.3%
White Zinfandel	2	2	1.6%	-11.1%
Carménère	0	0	0.1%	-25.0%
Other Varietals	24	14	11.3%	-39.6%
Total	138	128	100%	-8%

Trading Notes for Wineries

The off-premise sector (51% of vol) is made up by four large supermarkets: Superfoods, Ling and Sons, Pricemart, Do it Center, and neighborhood B and C stores. Approximately 120 total off premise accounts in the market.

On-premise (49% of vol) diverse restaurant offerings from cuisine to different levels of luxury and price.

Wine dinners and staff trainings are appreciated by restaurant managers since they have a high server turnover. The hospitality industry is highly dependent on immigrants who benefit from constant education and training.

Some of the top restaurants in Aruba include Fred Royal Aruba, Koal Restaurant, and Señor Frog's Aruba.

Market Insights

- Pricemart is regionally managed and has three decision making centers: Panama, Trinidad and Tobago and Dominican Republic.
 - Need to understand regional approvals to list products
- The other three large supermarkets make decisions locally taking US trends as benchmarks for their offerings.
- Local economy has suffered from global inflation pressure on disposable incomes.
- Real estate value has risen significantly from AirBnB listings (more than 5,000 properties) pricing locals out of the market.
- Hotels looking to cut costs are increasingly looking for lower priced items, particularly in all inclusive properties.
- Premium and above price points are mostly consumed during the high season (January to March) from mostly US and Canadian tourists.
- Parallel products can be an issue with product coming from The Netherlands that can disrupt shipping plans for wine brands from exporters like the one below.
 - <https://bomawines.com/about-us/>

Taxes, Shipping and Terms

- 1 USD = 1.79 AWG
- All duties and taxes in Aruba are calculated based on the CIF (Cost, Insurance, and Freight) value of the shipment
- **Import Duties**
- Specific Volumetric Duty
 - AWG 433 per hectoliter
 - 1 hectoliter = 100 liters
 - AWG 4.33 per liter
 - 750 ml = AWG 3.25 (\$1.82 USD)
- Excise Taxes
 - Combined Rate 7%
 - BBO (Turnover Tax): 2.5%
 - BAVP (Special Projects Levy): 3%
 - BAZX (State Health Insurance Levy): 3%
- Importer Credit Deduction:
 - Registered Aruban businesses importing goods can claim the 7% taxes paid as credit against the turnover tax they must pay on monthly sales
- **Required Documentation**
- Detailed Commercial Invoice (with FOB prices clearly separated from shipping/insurance costs)
- Bill of Lading (B/L)
- Certificate of Analysis / Origin (while there is no preferential trade treaty between the US and Aruba, this is standard for sanitary verification).
- Precise liquid volume and alcohol content per bottle documented on the packing list

Pricing Guidelines for Importers

	USD	AWG
	\$1.00	\$1.79
750 ml Bottle Price CIF	\$10.00	17.9
Import Duty	\$1.82	\$3.25
Base for Taxes	\$11.82	\$21.15
Excise Taxes		
(BBO/BAVP/BAZV)7%	\$0.83	\$1.48
Landed Cost	\$12.64	\$22.63
Distributor Margin 40%	\$8.43	\$15.09
List Price	\$21.07	\$37.72
Retailer Margin 30%	\$9.03	\$16.16
Consumer Retail Price	\$30.10	\$53.88

Notable Importers

- Arion Wine Company N.V.
- Aruba Trading Company
- Divino Aruba NV
- Frasa International Trading NV
- Licores Aruba N.V.
- Pepia Est N.V.
- Playa Liquor & Bottling Co.
- Romar Trading NV
- Swift Distribution Aruba
- TEC Inc. (The Eight Continent)

Tables and Tax information serve as directional reference that are subject to changes and updated by each country throughout the year. Contact your local importer for the most up-to-date information.

Price Tiers

Aruba

Category	2024 (000s 9L Cases)	2025 (000s 9L Cases)	Market Share	CAGR 2024-25	Price Tiers AWG\$
Prestige-Plus	0	0	0.0%	0.0%	Over 500.01
Prestige	1	1	0.4%	4.5%	278.01 to 500.00
Ultra-Premium	4	4	2.2%	-1.4%	180.01 to 278.00
Super-Premium	24	25	15.1%	3.3%	117.51 to 180.00
Premium	25	23	14.0%	-10.1%	85.01 to 117.50
Standard	74	62	38.2%	-15.9%	55.01 to 85.00
Value	43	46	28.3%	7.1%	31.51 to 55.00
Low-Price	2	3	1.7%	10.2%	31.50 and under
Still Wine	173	163	100.0%	-5.9%	

Cultural Awareness and Considerations

- Aruba has a diverse population with a strong Dutch heritage as part of the ABC Dutch Antilles (Aruba, Bonaire, Curacao).
- They appreciate straight to the point negotiations
- Good wine knowledge from local importers and on-premise management
- While it is a small country, a significant part of the A&P budget goes towards discounts and promotions
- There are increasing parallel imports by distributors, all-inclusive resorts and some of the leading supermarkets – especially those owned and operated by the Chinese community.

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