Puerto Rico

Food & Beverage Pulse

June
2026

Food & Beverage Retail Intelligence

Puerto Rico data only · DTRH IPC May 2026 (published Jun 26, 2026)

EXECUTIVE READ — JUNE 2026

The produce aisle is now the loudest number on the shelf. Fruits & vegetables hit +10.8% YoY in May — the single biggest food category spike on record this year. Meanwhile the consumer dollar just fell to $0.69. Motor fuel is up +44% YoY and every cent of that is working its way through the freight chain from Jacksonville to your product's facing. There's one bright spot: meats are finally easing.

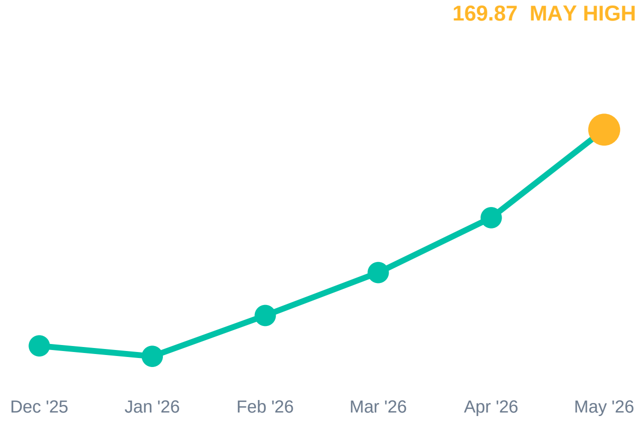
169.87	+2.9%	$0.69	+10.8%
Food & Bev CPI May '26 (DTRH)	Food Inflation YoY May '26 (DTRH)	Consumer dollar purchasing power (DTRH)	Fruits & Veg YoY May '26 ← NEW HIGH

SLIDE 02 — OFFICIAL PR DATA

What the Numbers Actually Say

PR Food & Bev CPI — Last 6 Months

Base Dec 2006=100 | Source: DTRH official



Mar '26 estimated — DTRH sub-category pub lag ~6 wks

YoY Change by Category — PR

May '26 vs May '25 (DTRH official)

Fruits & Vegetables	+10.8%
Sugar & Sweets	+5.3%
Non-Alc Beverages	+4.0%
Cereals & Grains	+3.6%
Food Away from Home	+3.2%
Food in General	+2.9%
Alcoholic Beverages	+2.2%
Meats/Poultry/Fish/Eggs	+0.8%
Fats & Oils	-2.8%

THE STORY IN ONE PARAGRAPH

Fruits & vegetables flipped from -3.3% YoY in January to +10.8% in May — a 14-point swing in four months. Motor fuel is up +44% YoY, which means every imported product on this island just got more expensive to land. The one real piece of relief: meats are easing to +0.8% YoY after running at +4.8% earlier this year.

SHOPPER BEHAVIOR

How Shoppers Are Actually Behaving

01 **The produce aisle is the new protein aisle.**

Fruits & veg at +10.8% YoY means the cheapest part of the basket just got expensive. Shoppers who were using produce to stretch a budget are now recalculating every meal.

02 **Meats easing is a moment — brands should notice.**

Meats/poultry/fish/eggs dropped to +0.8% YoY (-0.6% MoM). After months as the biggest pain point, that's relief. Shoppers will notice and protein brands should move.

03 **The $0.69 dollar is not abstract — it's felt.**

The consumer dollar is now worth $0.69 vs. $1.00 in Dec 2006. Compared to $0.73 a year ago — that's a real behavioral shift. Every premium SKU is being re-evaluated.

04 **Eating out is not a safe alternative anymore.**

Food away from home is up +3.2% YoY. The restaurant escape valve is closing. More meals moving home — which means your in-store battle just got more crowded.

05 **The freight shock is fully priced in now.**

Motor fuel +44% YoY. Jacksonville freight rates have adjusted. The energy shock we flagged in March is now on every shelf in PR. This is the new base cost.

CATEGORY DEEP DIVE — BEVERAGES

Beverages

+4.0% Non-Alc Beverages YoY May '26 (DTRH)	**+2.2%** Alcoholic Beverages YoY May '26 (DTRH)	**169.87** Food & Bev CPI May '26 (DTRH)	**$0.69** Consumer dollar purchasing power (DTRH)

The Story

Non-alcoholic beverages are running at +4.0% YoY in PR (DTRH May '26) — sustained pressure that shows no sign of reversing. Sugar & sweets inputs at +5.3% YoY mean that anything sweetened is structurally more expensive to make. Alcoholic beverages actually eased to +2.2% YoY (down from +3.5% earlier this year) — giving craft and imported spirits a small window to breathe. The bigger story is that with the consumer dollar at $0.69 and food away from home at +3.2%, the shopper who used to buy premium beverages at a restaurant is now making that decision in the aisle. You need to win that moment.

Plays to Run in July

- **Non-alc: put the value math in front of the shopper.**

  At +4.0% YoY, your price went up. The shopper knows. Show them what they're actually getting per serving vs. a restaurant version. Per-serving is the frame that wins.

- **Spirits: the easing is a window, not a gift.**

  Alcoholic beverages at +2.2% YoY is the lowest it's been. Use that headroom to activate trial now — especially at shelf — before the next cost wave hits.

- **Summer occasion: make the bundle obvious.**

  June-July in PR = summer gatherings. A beverage + snack bundle at a clear price point gives the shopper permission to buy more and feel smart about it.

- **Lock in loyalty program placement for Q3.**

  Q3 is peak beverage season in PR. Your digital coupon or loyalty offer needs to be live in Econo / Walmart / SuperMax by July 1 — not mid-month.

Soups & Instant Meals

THE CATEGORY DOING WORK FOR SHOPPERS RIGHT NOW

With fruits & vegetables up +10.8% YoY, the shopper who was building cheap meals around fresh produce is pivoting — and instant meals and soups are the direct beneficiary. Cereals & grains are up +3.6% YoY (higher than earlier in the year) which does put some pressure on wheat-based soups and pasta kits — but the value equation still works. A can of soup or an instant noodle kit still beats fresh produce + protein at current prices. Bakery products only rose +1.9% YoY (softer than expected), so the bread/instant meal pairing remains affordable. The category risk: if cereals keep climbing toward +5%, input cost pressure will hit in Q4.

PLAYS TO RUN IN JULY

The 'beats fresh' angle is real — use it.

With produce at +10.8% YoY, 'a complete meal for under $X' is not just a promo mechanic — it's a genuine value argument. Put the math in the creative.

Multipacks with a summer label.

Cereals at +3.6% means input costs are ticking up. Lock in volume now with a multipack price before Q4 costs force a restock at higher price.

Back to school is 6 weeks out.

August is the highest soup trial period in PR (school lunch prep). Your display, your in-store mechanic, and your digital coupon need to be active by July 15 at the latest.

Protein pairings to address the meat easing moment.

With meats at only +0.8% YoY, a 'soup + protein' bundle plays to the value seeker who now has more flex on the protein side.

CATEGORY DEEP DIVE — SNACKS

Snacks ■

+5.3%	+1.9%	+3.6%	HIGH
Sugar & Sweets YoY May '26 (DTRH)	Bakery Products YoY May '26 (DTRH)	Cereals YoY May '26 (DTRH)	Promo reliance in category

The Story

Sugar & sweets are up +5.3% YoY in PR (DTRH May '26) — the highest of any snack-adjacent category. Cereals at +3.6% add pressure on grain-based snacks. Yet bakery is actually slowing (+1.9% YoY), giving cracker and biscuit brands a bit of room. The structural issue for snacks is that with the consumer dollar at $0.69 and produce prices spiking, snacks are the first thing a budget-conscious parent edits out of the cart. Savory snacks with a protein or functional angle are holding. Pure sugar-based snacks without a story are losing placement. Summer is the highest snack-consumption period in PR — which makes July both the biggest opportunity and the hardest test.

Plays to Run in July

- **Confectionery: summer gifting is now.**

  Graduations, Father's Day (Jun 15), summer birthdays — confectionery lives in gifting season right now. Gifting display placement is your best ROI in July.

- **Savory: lead with protein or function — every time.**

  Sugar & sweets up +5.3% YoY gives functional savory snacks a real opening. 'Made with real X' or a protein callout at eye level earns the trade-up.

- **Summer value pack: let volume do the talking.**

  Multipacks at a flat price point tell the story without words. The shopper doing summer trips and beach days buys the value pack — be the one on the shelf.

- **Trial sizes for lapsed buyers.**

  The $0.69 dollar is keeping some shoppers away from full-price full-size. A $1-2 trial size is a re-acquisition play that costs less than a new customer.

Pantry / Meal Foundations ■

WHERE SHOPPERS ARE REBUILDING THEIR MEAL STRATEGY

With fruits & vegetables up +10.8% YoY, the 'cook fresh' strategy that PR shoppers relied on to stretch budgets is getting squeezed. They're moving toward pantry-built meals: canned goods, rice, beans, oils, sauces. Fats & oils are actually down -2.8% YoY — a real break on cooking staples. Cereals are up +3.6% YoY, putting pressure on rice and grain-based pantry items. The sugar & sweets spike (+5.3%) hits condiments and sweetened sauces. The big freight story: motor fuel at +44% YoY means every pantry item that crossed the Atlantic or came through the Jacksonville corridor is structurally more expensive to land. This cost is already on the shelf. Brands that held pricing through Q2 now have a genuine loyalty advantage going into Q3.

PLAYS TO RUN IN JULY

Fats & oils down -2.8%: shout it.

This is rare. If you're in fats, oils, or dressings — your price is actually better vs. a year ago. Make that visible. 'Our price is lower than last year' is the most powerful shelf message in this market right now.

Produce spike = pantry substitution window.

Canned tomatoes, jarred sauces, dried legumes — anything that replaces fresh produce in a recipe is having its moment. Get into that substitution narrative actively in content, digital, and at shelf.

Lock in back-to-school pantry placement early.

School year starts in August. Families stocking pantries for the year do it in late July. Your retail buyer conversation should be happening this week.

Brief buyer on Q3 cost outlook.

Motor fuel at +44% YoY means freight costs are structurally elevated. Show your buyer a 6-month cost model. Be the brand that plans ahead.

DTRH DATA — CHART

Puerto Rico CPI by Food Category

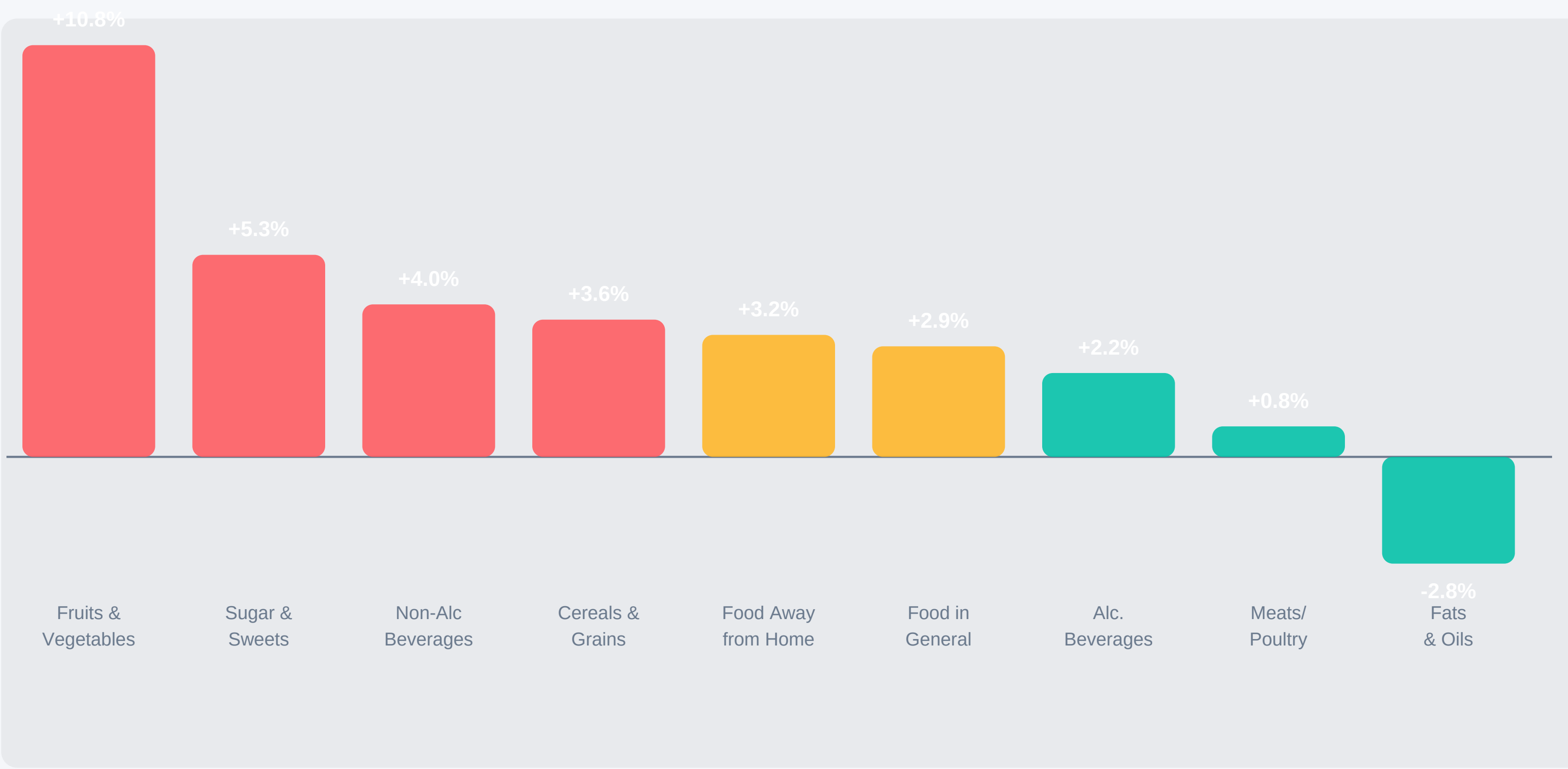
YoY change May 2026 vs May 2025 | Source: DTRH CPI Puerto Rico (published Jun 26, 2026)

Year-Over-Year (YoY) Change by Sub-Category — Puerto Rico

Data: DTRH IPC PR, May 2026 vs May 2025 | Consumer dollar: $0.69 (vs $0.73 a year ago)

Motor fuel: +44.0% YoY — driving structural freight cost increase for all imported F&B

High pressure
Moderate
Stable / easing



SCOREBOARD — JUNE 2026

How Did June Score?

Category health heading into July — Puerto Rico data only (DTRH May 2026)

CPI Fruits & Vegetables PR	+10.8% YoY (DTRH May '26)	RISK
CPI Sugar & Sweets PR	+5.3% YoY (DTRH May '26)	RISK
CPI Non-Alc Beverages PR	+4.0% YoY (DTRH May '26)	RISK
CPI Cereals & Grains PR	+3.6% YoY (DTRH May '26)	WATCH
CPI Bakery Products PR	+1.9% YoY (DTRH May '26)	WATCH
CPI Meats / Poultry / Fish / Eggs PR	+0.8% YoY (DTRH May '26)	OK
CPI Fats & Oils PR	-2.8% YoY (DTRH May '26)	OK
Consumer Dollar Purchasing Power PR	$0.69 (DTRH May '26)	RISK

DTRH publishes with ~6-week lag. May 2026 is the most recent sub-category data available (published Jun 26, 2026).

JULY PLAYBOOK

What to Run Right Now →

01 Put 'Fats & oils down -2.8%' to work.

It's literally cheaper than last year. Make that the message on every cooking oil, dressing, and fat-based product.

02 Own the produce substitution story.

Veg at +10.8% YoY. If your product replaces or complements fresh produce in a meal, say it. Loudly. Now.

03 Back-to-school setup starts this week.

August school start = pantry stocking in late July. Retail display, coupon, and buyer conversation all due now.

04 Summer gifting window is open.

Father's Day just passed. Next up: graduations, summer birthdays, family events. Confectionery and premium beverages live here.

05 Meats easing: protein brands should activate trial.

First real price relief in months. Shoppers will notice — activate trial and value packs while the window is open.

06 Summer multipack on soups & pantry.

With produce expensive and eating out also up +3.2% YoY, families are cooking at home more this summer. Size up.

07 Defend against private label — give them a reason.

The $0.69 dollar is pushing shoppers toward store brands. Function, provenance, or story — pick one and say it clearly.

08 Field Signal: central region ag input story coming.

A local farmer flagged the central region agricultural supply chain bottleneck as a key driver. Watch this space in August.

KEEP THIS IN MIND:

The brands that have held pricing, told the truth about their costs, and shown up with a real value argument every month — those are the brands with loyalty equity heading into the second half of 2026.