



USDA Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Template Version 2.08

Required Report - Public distribution

Date: 11/8/2007

GAIN Report Number: GT7016

Guatemala

Exporter Guide

Annual

2007

Approved by:

Robert Hoff, Agricultural Counselor
U.S. Embassy

Prepared by:

Edith Vasquez, Marketing Specialist

Report Highlights:

Guatemala has Central America's largest economy, accounting for almost one-third of the region's GDP. Guatemala is a net importer in global trade. Total imports grew from US\$10.5 billion 2005 to US\$11.9 billion in 2006. CAFTA-DR entered into force on July 01, 2006 and had a positive effect on bilateral trade adding between 0.6 and 1.0 percent to Guatemala's GDP.

Includes PSD Changes: No
Includes Trade Matrix: No
Annual Report
Guatemala City [GT1]
[GT]

Table of Contents

I	ECONOMIC SITUATION	3
A	Market Overview	3
B	Demographics	4
C	Market Size	5
D	Advantages & Challenges	5
II	EXPORTER BUSINESS TIPS	6
A	Business Customs	6
B	Consumer Tastes	6
E	Entry Strategy	9
III	MARKET SECTORS	9
A	Retail Sector	9
B	Hotel, Restaurant and Institutions	10
C	Food Processing	11
IV	BEST PROSPECTS	12
V	POST INFORMATION	13
VI	LIST OF MAJOR REGULATORY AGENCIES	13
	Demographics	15
	Consumer-Ready and Edible Fisheries Product Imports	16
	AG PRODUCTS TOTAL	16
	Top 15 Exporters of Consumer-Ready and Edible Fisheries	17

I ECONOMIC SITUATION

A Market Overview

Guatemala has Central America's largest economy, accounting for almost one-third of the region's GDP. According to the Central Bank, (BANGUAT) in 2006, Guatemala's economy grew by 4.6 percent (US\$ 35 billion). BANGUAT expects that the GDP for 2007 could increase by 5.2 percent thanks to the stability in the economy and the good results derived from the implementation of the free trade agreements. Guatemala has a total population of 13 million, 60% of Guatemalans live in rural areas and live in poverty. One of the major challenges facing Guatemala is helping the rural population enter the commercial economy and break the cycle of poverty. Also, there is a large number of Guatemalans living in the United States, contributing to the local economy through their family remittances that account for almost \$3.5 billion annually.

Guatemala ratified the U.S.-Central America-Dominican Republic Free Trade Agreement (CAFTA-DR) on March 10, 2005 and the agreement entered into force on July 1, 2006. CAFTA-DR has had a positive effect on bilateral trade and it is expected to add between 0.6 and 1.0 percentage points per year to Guatemala's GDP. Besides CAFTA-DR, Guatemala also has Free Trade Agreements with Mexico and Taiwan. Additionally, it has partial FTAs with Colombia, Cuba, Panama and Venezuela. Presently, is negotiating FTAs with Belize, Canada and Chile. Guatemala is part of the FTA with the European Union – Central America that is currently being negotiated conditioned by the prior integration between the Central American Customs Union (CACU).

Guatemala is a net importer in global trade. Total imports grew from US\$10.5 billion in 2005 to US\$11.9 billion in 2006. The United States is Guatemala's largest trading partner, account for 46% of total exports and providing 34% of total imports. Guatemala has no export or domestic subsidy programs and the Ministry of Agriculture (MAGA) has few of the domestic assistance programs available in the United States. MAGA implemented a rural credit system under the name of "Guate Invierte" and "Da Credito", where small loans are available under a trust fund program that includes crop insurance to protect small farmers. An afforestation incentive has been in place for the last 10 years to promote the forestry industry.

Macro economy:

U.S. agricultural exports to Guatemala have continued to grow during the last few years.

- Total U.S. agricultural exports totaled \$547 million in 2006.
- Bulk commodities grew from \$136 million in 2002 to \$281 million in 2006.
- Intermediate agricultural products grew from \$103 million in 2002 to \$140 million in 2006.
- Consumer-oriented products increased from \$102 in 2002 to \$125 million in 2006.

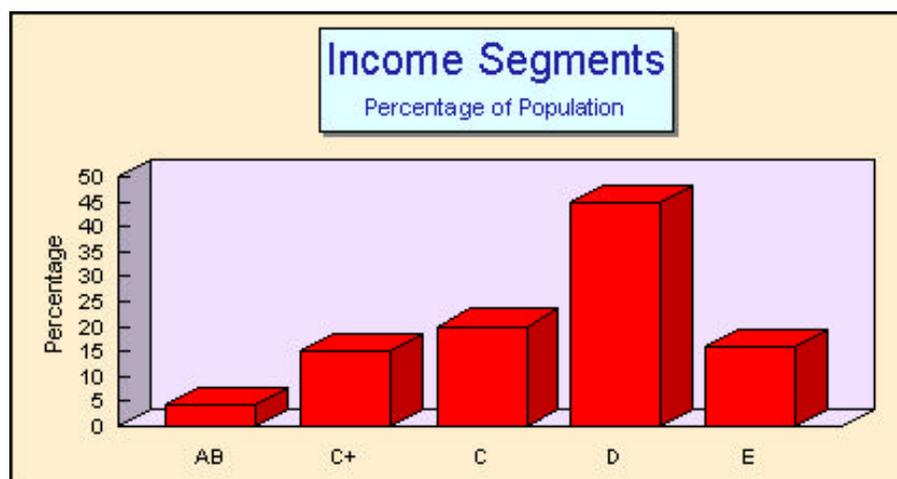
Despite these positive factors, there are some issues like the high prices of gasoline that affect the economy in the country. According to importers, increased gasoline prices are expected to lead to a 10% increase in shipping costs per container (approx. \$25-\$50.)

It is important for U.S. firms considering exporting to Guatemala to understand that the market conditions are strongly affected by income distribution and there is a major difference between the interior of the country and Guatemala City. Income is concentrated in the upper classes, with 63% of income in the hands of the top 20% of the population. The skewed income distribution determines a particular pattern of consumption, where the majority of the population consumes merely for subsistence.

Therefore, luxury goods can only be targeted to a significantly small portion of society. However, U.S. food products are very competitively priced and are sought out by both high-income and middle-income consumers. Many U.S. food products such as grains, poultry (chicken leg quarters), dairy and pork are cheaper than domestically produced products.

Percentage of income allocated to food purchases:

- § Rural 46.9%
- § Urban 31.6%
- § Interior of the country 37.1%
- § Metropolitan area 28.2%
- § Per Capita income in Guatemala City is 265% over the interior of the country



- AB – is the top 4% of the population, which can afford a wide array of food and beverage products. The main difference between A and B is that members of subset A are significantly wealthier than subset B.
- C+ - is the upscale middle class that can afford most food products. They tend to be professionals with family incomes over \$3500 a month.
- C- is the general middle class that must watch how they spend their income. They have some savings ability but very little.
- D – is the lower class that is barely surviving. They are subsistence buyers, and can only afford the basics.
- E – eats when it can, has no purchasing power and lives below the poverty line.

B Demographics

Guatemala's population is estimated at 13 million. Population growth has averaged 2.1% during each of the last four years. The breakdown of the population follows the pattern of an underdeveloped country. Approximately 41% of the population is less than 15 years of age; 56% of the population is between 15-64 years of age and only 3% is over 65 years of age. Internal migration towards Guatemala City has been constant in the last decade. The population of Guatemala City with its surrounding seven cities totals 3 million inhabitants.

The difference in population density between Guatemala City and the rest of the country is highly significant because it has determined the dynamics of economic and social growth of the nation. The department of Guatemala has a density of 1,212.9 inhabitants per square kilometer. The second densest department, Sacatepequez, only reaches 557.6 inhabitants per square kilometer. The rest of the departments are below 350 inhabitants per square kilometer. Given these demographics, it is easy to understand why most economic activity in the country revolves around the metropolitan area. Guatemala City and its surroundings offer the biggest concentrated market in the country with an accessible infrastructure. However, this development has created a wealth of opportunities outside the metropolitan area in other departments, as they have been historically neglected. Presently, there is a marketing trend toward the interior of the country. Decentralization has become the call of the day. Many firms are opening subsidiaries in the interior to try to capitalize on this movement.

C Market Size

Guatemala in 2006:

- ❖ Total food expenditures of more than \$3 billion.
- ❖ Total consumer-oriented and edible fisheries' market estimated at \$652 million.
- ❖ Total agricultural imports were \$1.4 billion.
- ❖ U.S. share of total agricultural imports was 44%.
- ❖ U.S. total consumer-oriented imports were \$156 million
- ❖ U.S. share of consumer-ready imports was 24%

Guatemala's economy is the largest in Central America with a GDP of over \$36.8 billion.

D Advantages & Challenges

Advantages	Challenges
Of the 13 million Guatemalans one-half million are in a position to afford any imported good, and an additional 4 million can afford competitive U.S. food products.	Rescued income distribution in Guatemala constrains imports.
Guatemalans view U.S. products as being of higher quality and safer than national products.	There is a lack of brand awareness among importers, retailers and especially consumers.
The expanding retail industry and the growing demand for new and better products by consumers, create an exceptional opportunity for new imported goods.	Wal-Mart captures almost 80% of the retail industry in Guatemala and Al-Mart headquarters in the U.S. makes purchasing decisions.
Importers are eager to take advantage of CAFTA-DR and favor trading with U.S. exporters.	Some imported products still have quotas under CAFTA-DR and importers must work jointly with Ministry of Economy to apply for a percentage of the quota and must go through a complicated bureaucratic process. Presently,

	importers are not transferring the economic benefits to the consumers.
The growing food processing industry is looking for new and better food ingredients.	There is limited infrastructure and distribution, especially on perishable products.
CAFTA-DR gives an opportunity to U.S. companies to introduce new products into the Guatemalan market.	Regional competition is strong, especially from Canada, Colombia, Mexico, El Salvador and Chile.
Local importers regularly receive updates from the ministries regarding new regulations and tariffs.	The major weakness in Guatemala's government agencies is the lack of a civil service and weak institutional.
The tourism sector is growing and U.S. raw materials are preferred among visitors because of quality and food safety.	Distribution of food products in the interior of Guatemala represents a challenge to importers of U.S. products.

II EXPORTER BUSINESS TIPS

A Business Customs

The Guatemalan Government (GOG) welcomes foreign investment and generally few legal or regulatory restrictions are placed for foreign investors. Guatemala represents a growing market for U.S. companies and is a country with relative stability and geographically is very close to the United States. With the implementation of CAFTA-DR one of the major benefits for U.S. exporters are the legal changes that improve Guatemala's transparency in customs dealings, anti-corruption measures in government contracting and procurement, and strong legal protection for U.S. investors.

Most businesses conducted in Guatemala are based on personal relationships. Business executives and government officials place great importance on personal contacts with suppliers. U.S. suppliers should be prepared to have a local representative or distributor and personally travel to Guatemala. U.S. businesspersons often are surprised at the accessibility to key decision-makers and the openness and frankness of local buyers.

Sales, service and support rank high in the minds of Guatemalan buyers. U.S. firms, more than other foreign firms, generally have a reputation for providing good service and support. U.S. firms interested in penetrating the Guatemalan market should make a commitment to offer excellent service support to their buyers, agents or distributors. This commitment should be made clear. Poor or mediocre service often results in lower sales. The Guatemalan business community is comparatively small and word travels fast about local and foreign firms that offer poor service support.

B Consumer Tastes

Presently, there are 1.4 million Guatemalans living in the United States; through the remittances sent to their families in Guatemala many high-value foods are more affordable to them and consumers are familiarized with the U.S. products. Also, many Guatemalans have traveled to the U.S. and have been introduced to American food products. U.S. products are viewed by consumers as being of higher quality and are preferred to other imports. Approximately 45% of all Guatemalan imports come from the U.S. Culturally speaking, Guatemalans have adopted much of the U.S. culture such as music, sports, fashion and fast food. Guatemalans have also followed the trend in the U.S. towards more convenience-oriented life style.

Demand for these types of products has grown in the last few years, and the trend is expected to continue. The local processing industry is also taking advantage of this niche market and ready-to-eat products such as refrigerated tacos, tortillas, burritos, corn-based tamales and instant soups are among the preferred foods in the supermarkets, not only for being easy to cook/heat, but also because of competitive price.

C Food Standards and Regulations

The Division of Registration and Control of Medicines and Foods of the Ministry of Health, here after referred to as Food Control, is the main authority for food products legally imported or manufactured in Guatemala. Government Decree # 45-79 established in 1979 the Health Code, later published and updated under Government Decree 90-97. Chapter Five of the Health Code refers to food products. Food Control, under authority of Ministerial Decree 969-99 (replaces Decree 132-85), is responsible for upholding food product norms set by the Guatemalan Ministry of Economy's Commission of Standards (COGUANOR). The Commission of Standards is governed by the Executive Advisory Committee, which is made up of representatives from the Ministry of Health, Ministry of Economy, Ministry of Labor, School of Engineers and Chambers of Agriculture, Industry and Commerce. COGUANOR maintains the mandate regarding voluntary standards, while a new commission assigned by the executive (Obligated Regulatory Commission) sets obligatory standards regarding processed food. Standards approved before December 17, 2005 will not be modified. The new standards commission started regulating those obligatory ones after December 17, 2005.

There are many specifications, rules, laws and other requirements regulating food products. Decree 969-99 details various regulations related to food safety. Standards for both local and imported products are exactly the same, except for public markets and other food serving locations that require a sanitary license but no product registration. Any producer, processor, packer, or distributor needs to operate under a sanitary license issued by Food Control. Importers need to be legally registered and imported products need to be registered as well. Labeling is required and imported food products must be marketed in Guatemala with a Spanish-language label but also stickers are allowed. A retailer who violates the food laws as interpreted by Food Control can be fined up to half the value of the previous day's total sales. Furthermore, there have been situations where imports have had difficulty clearing customs when the labels have not been in Spanish.

In order to receive an import permit, all imported foods of animal or vegetable origin must comply with the following requirements: phytosanitary and/or sanitary certificate, certificate of origin, commercial invoice, free sale certificate, bill of lading, and a microbiological certificate for products of animal origin. The Unit of Norms and Regulations of the Ministry of Agriculture, Livestock and Food Security (MAGA) controls all of these requirements and issues the import permit. Import procedures are readily available on-line at: http://www.maga.gob.gt/maga_portal/.

Product Registration is required for all packaged food products in Guatemala. Food Control is responsible for all registrations. Regulations and registration procedures and requirements can be consulted on-line at: <http://www.mspas.gob.gt/DGRVCS/DRCA/Iniciar.htm>

Food Control issues a sanitary registration number after a laboratory test has been performed on high-risk products. This registration number is valid for five years and takes six weeks to obtain in the case of high-risk products such as meat, poultry, deli-meats, etc. In the case of non-risk products, it takes approximately 48 hours to obtain the registry number and laboratory tests will take place within routine surveillance, scheduled annually according to product category. If products don't comply with labeling standards or food

safety parameters, importers will be notified as necessary. Non-risk products don't require a phyto- or sanitary certificate, neither a microbiological certificate.

It is recommended that samples be sent prior to attempting an export of high-risk products in order to obtain a sanitary registry number. Those samples must include the ingredients composition and the commercialization package, including proper labeling.

In addition to the laboratory analysis done to the product at the time of registration, for high-risk products, the law requires inspections at the point of entry, wholesale and retail levels for the wholesomeness of the product. Natural foods, non-processed foods, raw materials and food additives do not require registration. Also, there is no environmental legislation that affects the importation of food products. The cost of registration and analysis of a product is about US\$215, independent of the risk category.

The Sample Law outlined in article 37 of Ministerial Decree 969-99 strictly prohibits the importation of samples except for the sole purpose of registering the product. However, an agreement has been reached with USDA in which samples will be allowed to enter the country without requiring previous registration for the purpose of exhibition, special events and promotion. In order to get these samples into Guatemala, the importer must provide Food Control a written request accompanied by a certificate of free sale. To avoid problems with samples, it is best not to send more than 2 samples of 200 g each, per product, for registration purposes. For exhibition, special events and promotion, Food Control will allow the import of 25-50 kg per product, tax-free.

Microbiological - The GOG has been demanding that a microbiological certificate accompany all animal and unprocessed products. A private lab can issue this certificate, as well as the production plant's own quality control lab. All microbiological certificates that are not U.S. Federal documents must be stamped by a local chamber of commerce to be considered official. The GOG uses Codex Alimentarius to establish the maximum levels of parasites or residues. Most plants in the U.S. already have systems in place to measure this as part of their HACCP programs. It is just a matter of sending the most recent results. Exporters should make sure that the information is presented as parts per million, which is standard. U.S. tolerance levels for Salmonella, E-coli and others are acceptable in Guatemala.

Under CAFTA-DR the U.S. meat and poultry inspection system was recognized as equivalent by the Guatemalan Ministry of Agriculture, Livestock and Food (MAGA), so that FSIS certificates of wholesomeness count as the microbiological, and the free sale and sanitary certificates.

The labeling requirements are set by COGUANOR's labeling standard #34039. It sets 40 requirements with respect to the appearance of the label, what information should be on the label and that it must be written in Spanish. However, importers negotiated with COGUANOR and reached an agreement for a stick-on label to be used with the following information written in Spanish:

1. Product definition/description
2. Name of the product (This should be the official name as noted on the U.S. Certificate of free sale)
3. Physical characteristics, including ingredients (This has to be a qualitative composition, which was indicated in the back of the registration form). If this information is in English, please translate literally.
4. Net weight/volume
5. List of ingredients (including allergens) and additives and the % of total for each

6. Name, address and telephone number of Guatemalan distributor
7. Food Control registration number (D.G.S.S.-D.R.C.A. _____-Sanitary license obtained at a Center of Sanitation); the original license has to be presented. Approximate cost for each product: Q.1,650.00.
8. Country of origin
9. Lot production ID
10. Expiration date
11. If applicable "Keep Frozen" or "Form of Preparation"

Prior to the first importation, Ministry of Agriculture officials will inspect the warehouse where the imported product is to be stored, at the importer's expense. If product is to be used in a processing plant, an environmental impact study must be carried out. For additional information read this office's FAIRS Report 2007 GT7013 at www.fas.usda.gov/scripts/attacherep/default.asp

E Entry Strategy

The entry strategy in Guatemala for market development can be divided into two categories: one is to sell products through an agent or distributor. This means that the agent/distributor will have full control and responsibility for the product once it enters the country. Guatemala is a small market and very few local companies can purchase full containers of one product at a time; therefore it is important to have the support of a local agent or distributor that could help to maximize exports and help distribution around the country. Also, one of the advantages for using an agent/distributor is that they have expertise in regards to the local market, consumer preferences, and they have good knowledge on current laws, procedures, and business practices in Guatemala.

The other alternative is to sell directly to Guatemalan firms; however, it is necessary for the U.S. firm to build a good relationship with the local buyer and although some businessmen in Guatemala speak English, speaking Spanish could help in establishing a longer-term relationship. As a result of CAFTA, many local companies are now interested in buying directly from the U.S. as they believe they can lower costs if they can by-pass an agent/distributor. Credit terms are something U.S. companies should consider once a business relationship has been established, together with the assistance of marketing activities to introduce products into the market. The Foreign Affairs Office in Guatemala can provide U.S. firms with possible contact lists and information on local shows and activities to promote new-to-market products.

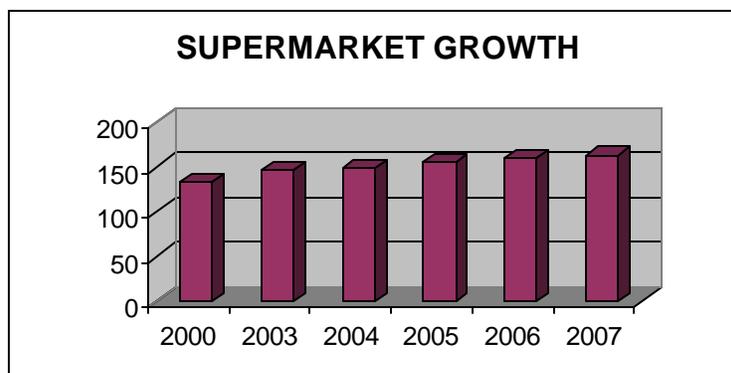
III MARKET SECTORS

A Retail Sector

Paiz/La Fragua is the region's largest supermarket chain in Guatemala and two years ago, became part of Wal-Mart Central America Group. In 2005, Wal-Mart acquired a third interest in CARHCO from the Dutch retailer Royal Ahold. In 2006, CARHCO was changed to Wal-Mart Central America and presently is the region's largest retailer, with 363 supermarkets and 23,000 associates in Central America. Wal-Mart Guatemala is the leader supermarket chain in the country accounting more than 8,000 employees and 132 sale units in five different concepts: Paiz, Hiper Paiz, Despensa Familiar, ClubCo and Maxi Bodega. Over the past two years the supermarket sector has been growing rapidly, increasing sales from \$509 million in 2003 to \$1.1 billion in 2006. This increase is due to the building of new outlets, the changing in purchasing habits among consumers, who now are going to a supermarket more than before, and the increase in brand awareness. Retail outlet sales have grown tremendously in the last few years.

In 2003, sales at supermarket-type retail outlets represented 36% of food sales with rest done at the traditional wet markets and corner stores. However, by 2006 the percentage in sales at supermarket-type retail outlets increased to 45%.

In September 2001, the second and third largest supermarket chains in Guatemala merged, forming one company with 22 units under the names of La Torre and Econosuper. The reason for their joining forces was to compete better against the La Fragua group. La Torre will cater to the more affluent consumer, while Econosuper will service the lower income consumer. A review of the stores showed that imported products represent no more than 20% of La Torre's product mix, while Econosuper will have less than 5%.



There are still ample opportunities in the retail sector, since only 40% of food sales are done through supermarkets (in most Latin American countries, supermarket sales represent 60% of total sales.) Supermarket sales are expected to continue to grow by at least 10% a year for the next few years.

B Hotel, Restaurant and Institutions

According to the Guatemalan Restaurant Council, throughout the country it is estimated that there are around 3,600 formal restaurants and approximately 4,900 informal restaurants. This industry has been growing over the last five years because many Guatemalans in the interior of the country and the urban areas eat outside their homes for breakfast and lunch while working and look for non-expensive restaurants. Also, opening a restaurant is an option for Guatemalans to begin their own-family business and become part of the formal economy of the country. This sector generates around 481,000 direct and indirect jobs and has an average annual growth between 12 to 14%.

Tourism is also key for this growth, as this sector has increased 70.64%, from 880,000 visitors in 2003 to 1,502,069 visitors in 2006. Last year, income from tourism totaled over a billion dollars.



The hotel sector has also increased as Guatemala now accounts for 2,497 lodging places from which 1,225 are hotels and the rest are bed & breakfast facilities. According to the Tourism Institute, the executive tourism is the fast growing sector; a typical businessperson spends twice as much as a regular tourist that comes on vacations, approximately \$107 per day.

This sector offers tremendous opportunity for high value products. There are many US franchises that are in need of raw materials, and they can't always fulfill their needs with local product. Besides, some of the franchise agreements require raw materials as part of the contract. The following is a list of franchises operating in Guatemala:

- o Subway
- o Taco Bell
- o Dominos Pizza
- o Applebees'
- o Chili's
- o Westin
- o Radisson
- Wendy's
- Cajun Grill
- Pizza Hut
- TGIF'S
- Pizza Inn
- Holiday Inn
- Best Western
- Burger King
- McDonald's
- Schlotzsky's
- Little Caesar's
- Quizno's
- Ramada
- Marriott

Institutional sales in Guatemala are probably the most difficult of all sales. The procurement process is very difficult and very bureaucratic. (Development of good contacts on the inside is still the best way to make the sale.) Also, the repayment delay is usually from 90 to 120 days and sometimes even longer. This market should be approached through the selection of a distributor that is already supplying institutions and is very familiar with the process.

C Food Processing

This is one of the fastest growing sectors in Guatemala, offering US food exporters huge opportunities to capture some market share supplying raw materials. *The areas with the most growth potential are:*

Meat Processing
 Processed Fruits and Vegetables
 Dairy
 Bakery
 Edible Oils
 Snack Foods
 Beverages
 Soups and Soup Broths

U.S. products such as beef, pork, wheat, soybeans, and vegetables, as well as other food items, can easily be introduced to improve the quality of the goods being processed in the above-mentioned sectors. Many of these plants already use U.S. raw materials. However, there are still plenty of opportunities.

Why is the processing industry growing?

- Local processors are increasing their capacity and quality to export to the US as a result of the implementation of CAFTA-DR.
- As Central American consumers become more sophisticated, opportunities for higher value-added products increase.
- Many local companies are taking advantage of their lower cost to structure market niches normally filled by imported products.
- The food processing industry has ridden the supermarket expansion wave, and now is directing its attention to the export market.

Products with the most potential in the food-processing sector are:

- Dehydrated Chicken
- Freeze Dried Vegetables
- Frozen Vegetables
- Fruit Concentrates
- Soybeans
- Wheat
- Flour
- Pork
- MDM
- Soy flakes
- Bean Splits
- Tomato Paste
- Soda Concentrates
- Dehydrated Potato Flakes
- Soy oil

IV BEST PROSPECTS

Product/Sector	Total Imports*	Imports from the U.S.*	U.S. Market Share	Projected Growth
Live animals	\$10.38	\$4.36	42%	31%
Fresh fruits	\$32.79	\$16.46	47%	4%
Red meats	\$23.01	\$10.10	43%	4%
Animal fats	\$38.14	\$30.48	79%	7%
Poultry	\$33.50	\$27.93	83%	4%
Pet foods (dog & cat food)	\$8.25	\$4.19	50%	7%

V POST INFORMATION

If you have any question or comments regarding this report or need assistance exporting to Guatemala, please contact the U.S. Agricultural Affairs Office at the following address:

Office of Agricultural Affairs
Avenida Reforma 7-01, Zona 10
Guatemala, Ciudad 01010
Tel: (502) 2332-4030
Fax: (502) 2331-8293
email: AgGuatemala@fas.usda.gov

For more information on exporting U.S. agricultural products to other countries, please visit the Foreign Agricultural Service home page: <http://www.fas.usda.gov>

VI LIST OF MAJOR REGULATORY AGENCIES

Name: Licda. Gladys Arreola
Title: Jefe
Institution: Departamento de Regulación y Control de Alimentos
Address: 3 Calle final, 2-10 Zona 15. Valles de Vista Hermosa. Guatemala
Telefax: (502) 2369-8784 / 6

Name: Ing. Manuel Lezana
Title: Director
Institution: Dirección General de Regulación, Vigilancia y Control de la Salud
(Health Services General Office, Ministry of Public Health)
Address: 6 Avenida 3-45, Zona 11, 3 Nivel, Escuela de Enfermería, Guatemala
Tel/Fax: (502) 2475-4682

Name: Ing. Ismael Mancilla
Title: Director
Institution: Laboratorio Unificado de Control de Alimentos y Medicament (LUCAM)
Address: Km. 22 Carretera al Pacífico, Bárcenas, Villa Nueva
Tel/Fax: (502) 6631-2013

Name: Lic. Eduardo Spiegeler
Title: Director
Institution: Unidad de Normas y Regulaciones/Ministerio de Agricultura
Address: 7 Avenida 3-67 Zona 13, Guatemala City, Guatemala
Telephone: (502) 2475-3058
Fax: (502) 2475-3058

Name: Dr. Anibal Menéndez
Title: Director OIRSA-SEPA-SITC
Institution: Organismo Internacional Regional de Sanidad Agropecuaria
Address: 21 Avenida 3-12, Zona 15, Guatemala
Telephone: (502) 2369-5900
Fax: (502) 2334-0646

Name: Lic. Bernardo López
Title: Minister
Institution: Ministry of Agriculture, Livestock and Food
Address: 7 Avenida 3-67 Zona 13, Guatemala
Telephone: (502) 2413-7000
Fax: (502) 2413-7002

Name: Lic. Carlos Illescas
Title: Director
Institution: Registro de la Propiedad Industrial
Address: 5 Calle 4-33, Zona 1
Edificio Plaza Rabi, 7o. Niv. Oficina 701, Guatemala
Telephone: (502) 2232-3618
Name: Ing. Hector Herrera
Title: Jefe de Normas
Institution: Comision Guatemalteca de Normas (COGUANOR)
Address: 8 Avenida 10-43, Zona 1, Guatemala
Telephone: (502) 2476-6784

Name: Lic. Eduardo Palacios
Title: Registrador
Institution: Valuables and Merchandise Registry (From the Ministry of Economy)
Address: 6 Avenida 10-43 Zona 1, Guatemala
Telephone: (502) 2361-2793, 2361-2794

Name: Licda. Karina Posadas
Institution: Ventanilla Unica para Inversiones
Address: 10 Calle 3-17, Zona 10. Edificio Aseguradora General, 4to. Nivel, Guatemala
Telephone: (502) 2421-2464

Name: Lic. Julio Corado
Title: CAFTA-DR Administrator
Institution: Foreign Commerce Administration Direction (From the Ministry of Economy)
Address: 6 Avenida 10-43 Zona 1, Guatemala
Telephone: (502) 2412-0200

VI APPENDIX

Demographics

POPULATION	TOTAL 2006	GROWTH RATE
Total Population	13 million	2.4%
Urban Population	3 million	3.5%
Size of Middle Class	4 million	1.6%

NUMBER OF MAJOR METROPOLITAN AREAS	38/1
Per Capita Gross Domestic Product (GDP)	\$5,000
Per Capita GDP Urban	\$1,908
Per Capita GDP Rural	\$880
Per Capita Food Expenditures	\$382
Unemployment Rate	3.2%
Percent of Female Population Employed	34.6%
Exchange rate (Oct. 2007)	\$1.00 = Q7.71

Source: Ministry of Economy

1/ These are cities with more than 100,000 inhabitants

Consumer-Ready and Edible Fisheries Product Imports

Guatemala Imports	Imports from the world			Imports from the U.S.			U.S. Market Share		
	Millions 2004	of 2005	\$US 2006	Millions 2004	of 2005	U.S. 2006	Percent 2004	2005	2006
CONSUMER-ORIENTED									
AGRICULTURAL TOTAL	523	613	652	127	147	155	24%	24%	23%
Snack foods (excl. nuts)	48	54	63	6	6	7	14	12	11
Breakfast cereals & pancake mix	33	34	39	3	3	3	9	9	9
Red meats, fresh/chilled/frozen	17	18	23	5	7	10	34	39	43
Red meats, prepared/preserved	14	14	14	7	7	7	49	52	50
Poultry meat	38	43	33	26	22	27	66	50	83
Dairy products (excl. cheese)	64	83	85	9	15	10	14	18	12
Cheese	14	16	20	1	1	2	9	8	10
Eggs & products	2	4	4	0	1	1	18	39	43
Fresh fruit	29	25	32	14	12	16	50	47	50
Fresh vegetables	3	5	4	0	1	0	4	23	11
Processed fruit & vegetables	37	40	46	9	12	20	26	31	42
Fruit & vegetable juices	14	19	24	5	6	6	36	33	28
Tree nuts	0	0	1	0	0	0	56	68	69
Wine & beer	5	6	8	0	0	0	3	3	4
Nursery products & cut flowers	2	2	2	0	0	0	17	14	14
Pet foods (dog & cat)	7	7	8	4	4	4	61	56	50
Other consumer-oriented	188	233	239	31	44	34	16	18	14
FISH & SEAFOOD PRODUCTS	27	35	32	9	5	4	35	16	14
Salmon	0	0	0	0	0	0	22	58	42
Surimi	0	0	0	0	0	0	79	99	78
Crustaceans	8	3	4	6	1	2	70	59	52
Groundfish & flatfish	0	0	0	0	0	0	66	59	66
Molluscs	1	1	1	0	0	0	29	42	56
Other fishery products	16	29	25	2	2	0	16	9	2
AG PRODUCTS TOTAL	1,115	1,244	1,341	502	544	614	45	44	45
AG FISH & FOREST TOTAL	1,170	1,289	1,411	518	556	627	44	43	44

Top 15 Exporters of Consumer-Ready and Edible Fisheries

Consumer-Oriented Total (Thousands \$US)				Edible Fishery (Thousands \$US)			
	2004	2005	2006		2004	2005	2006
United States	127,093	147,979	155,935	Panama	7,390	17,773	10,842
El Salvador	102,266	108,201	118,797	United States	9,852	5,930	4,792
Costa Rica	75,891	84,769	91,608	Costa Rica	3,547	3,397	3,944
Mexico	64,219	84,193	85,558	Thailand	132	608	3,233
Chile	22,282	24,729	31,994	Venezuela	0	0	3,035
Honduras	23,426	30,897	27,530	Ecuador	10	36	3,032
Nicaragua	12,311	13,105	26,643	Honduras	131	210	826
New Zealand	19,225	21,109	24,965	Spain	2,569	245	823
Netherlands	5,627	10,748	15,312	Nicaragua	522	536	797
Australia	5,794	8,945	13,929	El Salvador	229	331	520
Panama	19,334	29,730	8,983	Colombia	1,333	478	481
Brazil	5,794	8,945	13,929	Chile	246	39	167
China	1,738	2,984	5,320	Philippines	162	122	110
Spain	5,224	4,327	5,010	Vietnam	0	0	81
Colombia	3,457	3,317	3,699	Indonesia	125	76	66
World	523,520	613,352	652,022	World	27,740	35,462	32,949

Source: World Trade Atlas