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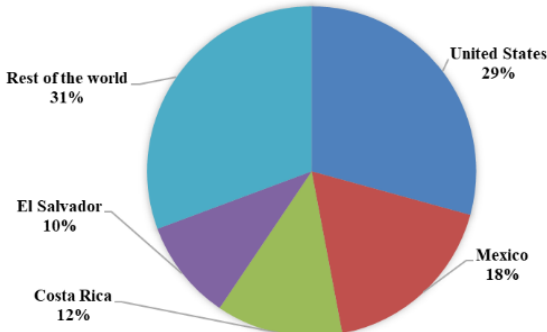
**Report Highlights:**

Guatemala's imports of consumer-oriented products continue to grow, reaching \$886 million in 2024, a 14 percent increase that surpassed imports of bulk and intermediate products by nearly 50 percent. Since 2020, imports in this category have doubled. Food sales in hotels, restaurants, and supermarkets are also increasing, driven by a young population with an average age of 26.

### Executive Summary

Guatemala, with a population of nearly 19 million, serves as the horticultural hub of Central America. The United States is Guatemala's primary trading partner, contributing to 40 percent of Guatemala's trade. As of January 1, 2025, nearly all U.S. consumer and industrial goods, except for white corn, enter duty-free under the CAFTA-DR.

### Consumer-Oriented Agricultural Imports



### Food Retail Industry

Guatemala's food retail sales reached \$9.7 billion in 2024, an increase of over 33 percent from 2023. Three supermarket chains dominate the retail sector in Guatemala. These supermarkets mainly target middle, and high-income consumers. However, there are still many opportunities in the industry. Only 30 percent of food sales are in supermarkets. Other consumers still rely on traditional open-air markets and corner stores.

### Food Processing Industry

Guatemala's food and beverage processing industry consists of approximately 2,200 companies, making up 46 percent of the country's total manufacturing sector. U.S. agricultural exports provide essential raw materials to support this industry. In 2024, the sector is projected to grow by 20 percent, creating a strong opportunity for U.S. companies to expand in Guatemala.

### Food Service Industry

In 2024, Guatemala's food industry experienced notable growth, driven by higher agricultural production, particularly in coffee, bananas, sugar, vegetables, and fruits, products that are largely exported worldwide. Exports from the food and beverage sector totaled \$2.1 billion, representing 18 percent of Guatemala's total exports to approximately 74 markets.

### Quick Facts CY 2024

Imports of Consumer-Oriented Ag Products from the U.S.  
**\$886 million**

List of Top 10 U.S. consumer-oriented products in Guatemala (million \$)

- |   |   |
|---|---|
| 1) Poultry Meat & Products ( <b>205</b> ) | 6) Food Preparations ( <b>38</b> )                |
| 2) Dairy Products ( <b>127</b> )          | 7) Conds. & Sauces ( <b>37</b> )                  |
| 3) Pork & Products ( <b>117</b> )         | 8) Fresh fruits ( <b>48</b> )                     |
| 4) Processed Veggies. ( <b>84</b> )       | 9) Bakery goods, cereals, and pasta ( <b>31</b> ) |
| 5) Beef & products ( <b>79</b> )          | 10) Meat Products ( <b>18</b> )                   |

Food Industry by Channels (U.S. billion)

Retail Food Industry	<b>\$9.7</b>
Food Service-HRI	<b>\$2.1</b>
Food Processing	<b>\$3.1</b>
Food and Agriculture Exports	<b>\$7.1</b>

Top Guatemalan Food Retailers

- |                                     |                               |
|-------------------------------------|-------------------------------|
| 1) Walmart Mexico & Central America | 4) Super 24                   |
| 2) Unisuper                         | 5) Grupo de Tiendas Asociadas |
| 3) Pricesmart                       |                               |

Total ag imports from the U.S.: **\$1.9 billion**

Total Guatemalan ag export to the U.S.: **\$2.9 billion**

Population (millions): **18 million (2024, IMF est.)**

GDP (USD): **\$109.5 billion**

GDP per capita (USD): **\$5,762**

*Source: Trade Data Monitor/BICO/IMF/Bank of Guatemala*

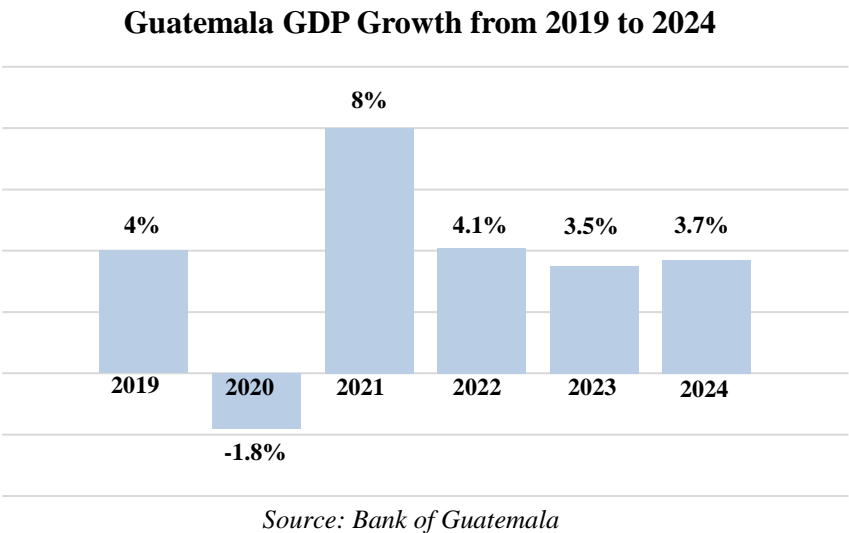
### Strengths/Weaknesses/Opportunities/Threats

<i>Strengths</i>	<i>Weaknesses</i>
As Guatemalan consumers become more sophisticated, opportunities for higher quality and specialty products increase.	Guatemala is a price-sensitive market. Guatemalan port authorities enforce a 100 percent inspection policy for imports.
<i>Opportunities</i>	<i>Threats</i>
The growing food processing industry is looking for quality ingredients for ready-to-eat products, bakery products, deli meats, beverages, and snacks.	FTAs with various countries create competition for U.S. products.

SECTION I. MARKET OVERVIEW

Market Research

In 2024, Guatemala, the largest economy and most populous country in Central America, had a GDP of \$109.5 billion and grew by 3.5 percent. For 2025, GDP growth is expected to slow to 3 percent.



Population and Key Demographic Trends

Guatemala’s population is currently estimated at 19 million, with a density of 174 people per square kilometer. More than half the population lives in urban areas, while about 40 percent resides in rural regions. The capital, Guatemala City, is home to nearly 3 million people and offers first-class hotels and restaurants. The country has a young population, with an average age of 26, and is well-acquainted with imported food products.

Size of Economy, Purchasing Power and Consumer Behavior

Agriculture is a key driver of Guatemala’s economy, contributing 13.5 percent of GDP and employing 31 percent of the labor force. The economy depends heavily on international trade, especially exports to the United States and other Central American countries. In 2024, total exports reached \$14.6 billion, a 2.3 percent increase from 2023. Remittances are another crucial component, with over a million Guatemalans living in the United States. In 2024, remittances rose by 8.6 percent from 2023, totaling \$21.5 billion, equivalent to 20 percent of GDP. Tourism accounts for 10.2 percent of GDP. The Guatemalan Tourism Institute reported that 3.03 million tourists visited the country in 2024, a 15 percent increase compared to 2023. Almost 45 percent of visitors came from El Salvador, while the remainder were from the United States, Europe, and other Central American countries.

## Overall Business Climate

U.S. companies should be aware that market conditions in Guatemala are shaped by income distribution. Consumer tastes and purchasing decisions vary notably between those living in the interior, outside tourist areas like Antigua, Panajachel, and Puerto Barrios, and those in Guatemala City. U.S. food products are generally competitively priced and distributed primarily to middle- and high-income consumers. Many U.S. products, including grains, chicken leg quarters, fats and oils, and preserved foods, also tend to be more affordable than some locally produced options.

## Recent Trends

While Guatemalan cuisine is deeply rooted in its Mayan heritage, emphasizing corn and beans, younger consumers are increasingly following the global trend toward healthier food products, seeking low-sugar, low-fat, and lactose-free options. These products, however, are primarily targeted at high-income consumers. Additionally, exposure to international cuisine has expanded dietary choices and boosted the popularity of fast food and international restaurants.

**Table 1. Advantages and Challenges**

Advantages	Challenges
Strategic geographic access to Guatemala on both the Atlantic and Pacific Oceans.	Roads throughout the country are in poor condition, and transportation costs are high.
All U.S. agricultural products (except for white corn) imported from the United States are duty-free, thanks to CAFTA-DR.	FTAs with various countries create intense competition. Guatemala is seeking to expand its export markets and is negotiating agreements with the United Arab Emirates, Turkey, and Canada.
Low-cost transportation of goods thanks to the proximity of U.S. ports. U.S. suppliers can export smaller quantities at competitive prices.	Limited investment in Guatemalan port infrastructure restricts trade capacity. Consequently, food and beverage importers face delays and high demurrage costs, which are seen as part of doing business in Guatemala, especially for bulk commodities.
Supermarket chains open stores annually, mainly in the country's interior. These stores sell domestic and imported goods.	The lack of a platform for imports/exports of food and the accumulation of a product-by-product sanitary registration has increased import permits delays.
Guatemala cannot meet domestic demand for bulk commodities such as wheat, corn, beans, and rice.	Sanitary and phytosanitary rules are subject to an inconsistent regulatory structure, imposing non-technical measures on U.S. exports.

Advantages	Challenges
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Shipping products from the U.S. is cheaper and quicker than shipping from Europe.	Contraband is a growing problem; local business leaders, especially in the agricultural and manufacturing sectors, estimate that contraband has negatively impacted up to 30 percent of the formal economy, with a corresponding impact on tax collection.
As Guatemalan consumers become more sophisticated, opportunities for higher quality and specialty products increase.	Guatemala is a price-sensitive market, which could affect loyalty to brands in economic difficulty.

## SECTION II. EXPORTER BUSINESS TIPS

### Market Research

The Government of Guatemala welcomes foreign investment and generally places few legal or regulatory restrictions on foreign investors. Guatemala represents a growing market for U.S. companies. It is a country with economic stability, a strategic location with ports on the Atlantic and Pacific Oceans, and proximity to the United States.

More information on how to invest in Guatemala can be found here: <https://investguatemala.com>

### Local Business Customs and Trends

Most businesses conducted in Guatemala are based on:

- Personal relationships are preferred by Guatemalans when doing business. Business executives and government officials place great importance on personal contact with suppliers.
- U.S. suppliers should be prepared to have a local representative or distributor and to travel to Guatemala, when possible, to better understand the market. U.S. businesses are often surprised at the accessibility of key decision-makers and the openness and frankness of local buyers.
- After the pandemic, business executives and government officials are open to virtual meetings, events, and training when required.
- Sales, service, and support rank high in the minds of Guatemalan buyers. More than foreign firms, U.S. firms generally have a reputation for providing exemplary service and support. U.S. firms interested in penetrating the Guatemalan market should commit to offering excellent customer service to their buyers, agents, and distributors.
- Guatemalan importers typically require product samples. Potential buyers request U.S. companies support the marketing efforts of new products, and when placing orders, they

will need specific volumes of products; meeting these requirements will result in successful business relationships.

For more information on how to do business in Guatemala, please see the [2024 Country Commercial Guide](#).

### **General Consumer Tastes and Trends**

Guatemalan consumers are increasingly seeking high-quality, traditionally made products, with e-commerce becoming a popular channel for these purchases. Younger urban consumers, in particular, show a growing preference for healthier options, organic products, and premium, artisanal foods.

## **SECTION III: IMPORT FOOD STANDARDS, REGULATIONS AND PROCEDURES**

### **Customs Clearance**

Guatemala has four main seaports: Puerto Barrios and Santo Tomás in the Atlantic, and San José and Port Quetzal in the Pacific. Santo Tomás is the busiest on the Atlantic side, handling most container cargo, while Port Quetzal is preferred for bulk commodities. Common delays affect shipments of fruits, potatoes, poultry, and meats. Import permit fees and OIRSA inspection and treatment fees are available at [MAGA's service fees page](#), while processed food registration and import permits can be found at the [food control services page](#). The latest figures show that the average cost of documentary compliance for imports in Guatemala is approximately \$405.

### **Documents Generally Required by the Country Authority for Imported Food**

Guatemalan food laws consist of a series of laws and presidential and ministerial decrees designed to protect human, animal, and plant health. [MAGA](#) oversees fresh, refrigerated, and unprocessed frozen food products. Processed foods fall under the [Ministry of Public Health and Social Assistance](#) (MSPAS), except for pet food and treats, which are regulated by MAGA. Some food products, like seeds used as ingredients, flours, and processed foods of animal origin, are regulated by both ministries. Food safety in Guatemala is governed by [Government Decree 969-99](#).

### **Country Language Labeling Requirements**

Non-processed foods are exempt from labeling requirements, while processed foods must be labeled, applying equally to domestic and imported products. [RTCA 67.01.07:10](#), based on the CODEX general standard, governs labeling. Spanish labeling is not mandatory but may be added as a stick-on label, applied by either the U.S. exporter or the Guatemalan importer. Central America accepts FDA labeling. The rule requires labels to be informative, non-misleading, and truthful. It includes definitions, examples based on package size or form, and guidelines for complementary labeling. Spices, herbs (cut into pieces smaller than 10 cm<sup>2</sup>),

broths, chewing gum, confectionery, and other small individually packaged items only need to label the outer package.

## **Tariffs and FTAs**

The Dominican Republic-Central America Free Trade Agreement (CAFTA-DR) entered into force in Guatemala on July 1, 2006, and has since boosted bilateral trade between Guatemala and the United States. Key agricultural exports to Guatemala include yellow corn, wheat, soybean meal, and poultry meat. The United States and other Central American countries are Guatemala's main trade partners. In addition to CAFTA-DR, Guatemala has bilateral or regional free trade agreements with Chile, Colombia, the Dominican Republic, Israel, Mexico, Panama, Taiwan, the European Free Trade Association countries, and a recent agreement with the United Kingdom. For more details, visit: [Guatemala Ministry of Economy - Free Trade Agreements](#).

## **Trademarks and Patents Market Research**

Guatemala's intellectual property rights (IPR) legislation is modern and aligns with multilateral agreements such as the Paris, Berne, and Rome Conventions. As a WTO member, Guatemala also adheres to TRIPS (Trade-Related Aspects of Intellectual Property Rights). The country recognizes trademarks, brand names, patents, designations of origin, and copyrights. The IPR Registry, part of the Ministry of Economy, oversees all registrations. Patents and trademarks are granted on a first-in-time, first-in-right basis, so it is advisable to secure these protections before launching a business. For details on import regulations and standards, refer to the Food and Agricultural Import Regulations and Standards (FAIRS) Report 2024 at [FAIRS Country Report](#) and the [FAIRS Export Certificate Report](#).

## **SECTION IV: MARKET SECTOR STRUCTURE AND TRENDS**

Key sectors in Guatemala's market include manufacturing, agriculture, and commerce. Manufacturing focuses on light assembly of cotton products and food processing for both domestic sales and exports, primarily to Central American countries and the United States. Commerce includes retail, featuring a mix of supermarket chains and traditional markets. While Guatemala is generally price-sensitive, consumers make exceptions for specialized products, where price is less of a factor in purchasing decisions. Food trucks are an emerging niche in the food and beverage industry, offering a wide variety of cuisines and catering to varied consumer preferences. They operate mainly in Guatemala City, serving lunch crowds and social events.

### **Food Retail**

- The two largest supermarkets in Guatemala are Walmart (Mexico and Central America), with a 51 percent retail value share, and Unisuper (La Torre/Econosuper), with a 21.5 percent retail value share.
- Supermarkets only capture 30 percent of total food sales, as the rest of sales occur in open-air markets, and informal retailers.

- Higher-end consumers buy groceries in supermarkets weekly, as they have higher disposable incomes and value the service of modern channel retailers.
- Apartment buildings continue to pop up in various zones in Guatemala City, especially in high-end neighborhoods; this new living concept is causing shoppers to look for convenience stores that offer quick and easy access to items in smaller amounts than they usually purchase at larger supermarkets.
- Online shopping remained a purchasing method implemented because of the pandemic and is now a more common purchasing method at larger supermarkets.

For more information about the supermarket sector in Guatemala, please see the [2024 Retail Report](#).

## **Food Processing**

- Guatemala significantly imports raw materials and ingredients, which local companies use for further processing for domestic consumption and exports.
- The food and beverage subsector represents 47.7 percent of Guatemala's industrial GDP, representing one of the most significant economic activities in the country.
- Demand for more ready-to-eat food is growing in Guatemala. The local processing industry is focusing on producing more refrigerated products such as tacos, tortillas, burritos, and corn-based tamales.
- Processed food exports are mainly exported to Central America, Mexico, and the United States. Palm oil, cookies and other bakery products, prepared sauces, and non-alcoholic beverages are among the most significant exports of processed food goods.

For more information about this industry in Guatemala, please see the [2025 Food Processing Report](#).

## **Hotel and Restaurant**

- Hotels account for around 2,700 units, including hotels, motels, and bed and breakfasts servicing travelers for business and tourism travelers.
- Restaurants are estimated at 25,000 including franchises, local cafeterias, and formal dining establishments.
- AirBnB is a platform which is available for tourists and local tourists traveling mainly to the interior of the country.
- Hotels and restaurants in Guatemala purchase products through wholesalers, retailers, and informal markets; for imported food products, they buy from importers, supermarkets, or membership stores that can offer more significant quantities.

For more information about this sector in Guatemala, please see the [2024 Hotel, Restaurant and Institutional Report](#).



## Best Consumer-Oriented Product Prospects

Table 2

Partner country	Value in Million U.S. Dollars			% share 2024	% change 2023/2024
	2022	2023	2024		
World	2,806	3,064	3,464	100	0
United States	820	914	1,014	29	11
Mexico	498	555	589	17	6
Costa Rica	349	396	467	14	18
El Salvador	277	289	309	9	7
Honduras	131	150	183	5	22

## Retailer Information

### Links to Access Retailer Information for Stores, Locations, and Ownership

Company	Links
Walmart Central America	<a href="https://corporate.walmart.com/about/international/markets/central-america">https://corporate.walmart.com/about/international/markets/central-america</a>
Unisuper	<a href="https://www.supermercadoslatorre.com/web/index.php/">https://www.supermercadoslatorre.com/web/index.php/</a>
Pricesmart de Guatemala	<a href="https://www.pricesmart.com/es-gt">https://www.pricesmart.com/es-gt</a>
Grupo de Tiendas Asociadas	<a href="https://gta.com.gt/">https://gta.com.gt/</a>

## Competitive Situation

The United States and Guatemala maintain a strong bilateral trade relationship in agriculture. In 2024, Guatemala imported \$5.8 billion worth of agricultural products globally, with \$1.9 billion coming from the United States. Key U.S. exports to Guatemala included corn (\$289 million), soybean meal (\$254 million), poultry meat and products (\$205 million), dairy products (\$127 million), and pork and pork products (\$117 million). Mexico is the main competitor for U.S. consumer-oriented products in Guatemala, holding an 18 percent market share (condiments and sauces, beer, chewing gum and candy, pet food). Costa Rica accounts for 12 percent (soups and other food preparations), and El Salvador has a 10 percent share (bakery goods, cereals and pasta, non-alcoholic beverages, processed fruits).

Table 3. Competitors to U.S. Exports in the Guatemalan Market

Product	Country	Guatemalan imports from this Competitor in 2024 (\$ millions)	Guatemala Imports from the U.S. in 2024 (\$ millions)
Soups and other food preparations	Costa Rica	207	97
Bakery goods, cereals, & pasta	El Salvador	101	31
Condiments and sauces	Mexico	86	39
Non-alcoholic beverages (ex. juices, coffee, and tea)	El Salvador	60	17
Beer	Mexico	30	1
Chewing gum and candy	Mexico	29	8
Dog and cat food	Mexico	25	15
Processed fruits	El Salvador	20	8
Spices	Honduras	7	1
Wine and related products	Chile	7	3

Source: Trade Data Monitor

## SECTION V: AGRICULTURAL AND FOOD IMPORTS

**Table 4. U.S. Agricultural and Food Import Statistics (in millions of dollars)**

Product	2020	2021	2022	2023	2024
Consumer Oriented	466	632	679	778	886
Bulk	445	546	600	421	548
Intermediate	373	471	527	433	442
Agricultural Related Products	11	15	19	22	21
Total Agricultural & Related Products	1,295	1,664	1,825	1,654	1,897

Source: U.S. Census Bureau Trade Data

For a detailed report, please visit [FAS BICO reports](#).

### Best High-Value, Consumer-Oriented Product Prospects

**Table 5. Top Ten Imported Consumer-Oriented Agricultural Products from the World**

Country	Product	Total in 2024 (\$ million)
Costa Rica	Soup and other food preparations	207
El Salvador	Bakery goods, cereals, and pasta	101
Mexico	Condiments and sauces	86
Nicaragua	Beef and beef products	54
New Zealand	Dairy products	50
Chile	Fresh fruit	39
China	Chewing Gum & Candy	20
Country	Product	Total in 2024 (\$ million)

Honduras	Dog & Cat Food	12
Netherlands	Nursery products & cut flowers	7
Spain	Wine & related products	6

**Table 6. Top Ten Fastest Growing U.S. Consumer-Oriented Agricultural Products**

<b>Product</b>	<b>U.S. Exports to Guatemala in million USD</b>	<b>Opportunities for U.S. suppliers</b>
Poultry meat and meat products (excl. eggs)	205	The TRQ for chicken leg quarters was eliminated in 2017 when the tariff was set to zero. Consumers see chicken meat as a good source of protein in their diets at affordable prices compared to other meat products.
Dairy products	127	The food processing industry demands whey protein, cream, and powdered milk. In addition, there are many opportunities to sell processed cheeses for the restaurant and retail sectors.
Pork and pork products	117	The meat processing industry requires hams and deli meats, while ribs and loins are sold in hotels, restaurants, and retail.
Processed vegetables (frozen potatoes)	84	Consumer demand for frozen French fries and other potato products has increased recently. In 2024, the imports of U.S. frozen potatoes grew 21 percent from the previous year, totaling \$66 million (nearly 90 percent of all processed vegetables)
Beef and beef products	79	Higher-end cuts, such as T-bones, tomahawk, ribeye, etc., can be sold at specialty meat stores, hotels, and restaurants.
Apples, grapes, pears	48	Local production of apples, grapes, and pears is minimal and of low quality. The market depends on imports, and for the last 10 years, imports have been year-round.
Food preparations	38	Traffic and long work schedules drive consumers to seek ready-to-eat products, both refrigerated and frozen. In many cases, given the cost of eating out, workers must bring easy-to-prepare meals to their workplaces.
Condiments & sauces	36	Foodservice and related activities represent almost half of Guatemala's total workforce. In hotels and restaurants, condiments and sauces are used to complement and enhance the flavors of dishes, as well as to personalize the diner's experience.
Bakery goods, cereals & pasta	31	Although the country has a large processing industry, there are opportunities in the pasta and cereal segment, primarily in products that are organic, low in sugar, gluten-free, etc.
Meat products	19	In processed meats, charcuterie-style meats such as salamis, prosciutto, and chorizo, are among the most in-demand products. They are primarily sold in restaurants and bars.

*Source: U.S. Census Bureau Trade Data*

## **SECTION VI: KEY CONTACTS AND FURTHER INFORMATION**

Government Regulatory Agencies	Contact Information
<b>Ministerio de Salud y Asistencia Social (Ministry of Health)</b> Contact: Ms. Evelyn Meneses, Director for Food and Drugs Regulations	<b>E-mail:</b> <a href="mailto:emeneses@mspas.gob.gt">emeneses@mspas.gob.gt</a> <b>Website:</b> <a href="http://www.mspas.gob.gt">www.mspas.gob.gt</a>
<b>Ministerio de Agricultura, Ganadería y Alimentación (Ministry of Agriculture)</b> Contact: Nelson Ruano, Food Safety Director	<b>Email:</b> <a href="mailto:mvnelsonru@yahoo.es">mvnelsonru@yahoo.es</a> <b>Website:</b> <a href="http://www.maga.gob.gt">www.maga.gob.gt</a>
<b>Ministerio de Economía (Ministry of Economy)</b> Contact: Victoria Meza, CAFTA-DR Administrador	<b>Email:</b> <a href="mailto:vmeza@mineco.gob.gt">vmeza@mineco.gob.gt</a> <b>Website:</b> <a href="http://www.mineco.gob.gt">www.mineco.gob.gt</a>
<b>Superintendencia de Administración Tributaria</b> <b>Guatemalan Tax Authority - Customs</b> Contact: Edwin Curtidor, Customs Intendent	<b>Email:</b> <a href="mailto:eocurtidor@sat.gob.gt">eocurtidor@sat.gob.gt</a> <b>Website:</b> <a href="http://www.portal.sat.gob.gt/portal">www.portal.sat.gob.gt/portal</a>

### U.S. Embassy Guatemala – Social Media Sites



<https://www.facebook.com/Embajada.EEUU.Guatemala/>



<https://www.instagram.com/usembassyguatemala/?hl=en>



<https://x.com/usembassyguate?lang=en>

### Foreign Agricultural Service - Guatemala

<b>Agricultural Affairs Office</b> <b>Address: Boulevard Austriaco 11-51 Zona 16, Guatemala, Guatemala</b> <b>FAS Website:</b> <a href="http://www.fas.usda.gov">www.fas.usda.gov</a>	<b>Phone: (502) 2354-0000</b> <b>Email:</b> <a href="mailto:AgGuatemala@usda.gov">AgGuatemala@usda.gov</a>
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### Attachments:

No Attachments