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Honduras

Exporter Guide

Annual

2003

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Report Highlights:

The Honduras retail sector is by far the largest market for imported food, due to the expansion of supermarkets in urban areas and opportunities even through distant shopping mechanisms. The HRI sector is developing rapidly and has a tremendous potential for processed products. Tourism is growing at a fast pace: in a span of three years, visitors have increased by 84%, food and drink establishments by 76% hotels by 41% and cruise ship visitors by 168%. Important investments for the HRI sector in the Bay Islands and North Coast of Honduras are taking place.

Includes PSD changes: No
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I. MARKET OVERVIEW

A. Economic Situation

Honduras has made noticeable reconstruction advances after the 1998 Hurricane Mitch-induced recession.

Major factors influencing the Honduran economy in 2002 were the slow international economy, the ongoing coffee crisis, and the low international prices for export products (bananas, shrimp, soaps and detergents). However, Honduras' growth was the highest of the Central American countries, after Costa Rica.

Inflation was down to 8.1% from 8.8% in the previous year.

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- GDP grew by 2.5%, slightly less than the 2.6% growth in 2001.
- The Fiscal deficit was 5.4% of GDP, lower than the 6% observed in 2001.
- Total exports were \$1.37 billion, down by 1.5 % from 2001.
- Exports to the United States increased by 9% to reach \$665.2 million.
- Total imports were \$2.8 billion, a decrease of 0.1% over 2001.
- Imports from the U.S. were \$1.2 billion, unchanged from 2001.
- Family remittances increased 32.1% from \$533.0 to \$704.3 million in 2002.

With annual per capita income of only \$1,067, a large share of this income goes to food purchases. In rural areas it is estimated that close to 65% of family income is dedicated to food, while in urban areas it is closer to 50%. Consequently, for food and beverage products, price is the most important marketing issue in Honduras. Although more and more women are entering the work force every day, particularly in drawback operations, women remain the main decisionmakers when it comes to food purchases. Honduran customers of the upper-and middle-income levels often prefer U.S. products based on quality, wholesomeness, and variety.

B. Market Growth

U.S. agricultural exports to Honduras have continued to grow as follows:

- Total agricultural exports increased 20 percent, from \$153 million in 1997 to \$184 million in 2002.
- Total agricultural, fish and forestry exports increased by 17 percent, from \$161 million in 1997 to \$188 million in 2002.
- Bulk commodities increased 28 percent, from \$65 million in 1997 to \$83 million in 2002.
- Intermediate agricultural products decreased 2 percent, from \$56 million in 1997 to \$55 million in 2002.
- Consumer-oriented products increased by 48 percent, from \$31 million in 1997 to \$46 million in 2002.

C. Market Opportunities and Competitiveness

The strengths, market opportunities, and competitiveness of U.S. suppliers are illustrated in the following table:

ADVANTAGES	CHALLENGES
Close proximity to the U.S. Containerized cargo from gateway cities can be transported to Honduras in 3-4 days.	Direct competition from other Central American countries, as well as Mexico and Chile.
Consumers have strong preferences for U.S. products. U.S. products enjoy a high-quality image among Hondurans. Importers prefer trading with U.S. exporters because of reliability.	The current economic situation in the country limits purchasing power and customers are price sensitive.
Rapidly developing retail sector and HRI sector. Strong presence and growth of U.S. fast food outlets, casual dining restaurants and introduction of new U.S. hotel chains. Tourism is growing at a fast pace, including investment in the Bay Islands and North Coast of Honduras, prime tourist areas.	Relative high duties on some products, inconsistent customs valuation practices, and import procedure make it more difficult to enter the market.
Increase in infrastructure and facilities have permitted the year-round availability of U.S. fruits such as apples, pears and grapes. Direct imports by warehouse outlets have diversified food imports.	Unclear and occasionally restrictive zoosanitary and phytosanitary import requirements when importing.

II. EXPORTER BUSINESS TIPS

A. Business Customs

As in most Latin American countries, a good personal relationship with prospective customers is basic to penetrating the market. While it may take a little longer than is customary in the U.S. to establish a business relationship, the investment in time can pay off in long-lasting and mutually profitable alliances. U.S. suppliers should be prepared to have a local representative or distributor to personally travel to Honduras.

The two main business centers in Honduras are Tegucigalpa, the capital city, and San Pedro Sula, the industrial center. Large importers and distributors in Honduras usually have offices in both cities to take advantage of market opportunities. In some instances, large international firms have granted "exclusive" distributor rights to different companies in the different cities, i.e., one exclusive distributor in San Pedro Sula and another in Tegucigalpa. These types of arrangements are acceptable under current Honduran laws.

B. Consumer Tastes and Preferences

Hondurans were first introduced to U.S. products through the banana companies and their commissaries. An example is their acquired taste for oatmeal for breakfast. The strong bond that Hondurans have with the United States has been enlarged with increased migration, both legal and illegal, of about 600,000 Hondurans to the United States. The income from their employment generates foreign exchange remittances to their households in Honduras of about \$704.3 million annually. Moreover, many Hondurans return home every year to share their summer and Christmas Holidays with their families, bringing their acquired taste for American food. It has become a convenient and pleasant custom for middle-income families to eat at U.S. fast food outlets. In addition, the lack of parks for children to play makes it especially attractive for them to enjoy the game rooms that the franchises provide.

U.S.-Honduran ties are further strengthened by international assistance, exchange programs, numerous U.S. business and tourist visitors, as well as Americans residing in the country. Young generations have identified themselves with U.S. music and fashions over the years. Through all these bonds many Hondurans have acquired a taste for American food products and adopted much of U.S. culture, which they have introduced to their families. In addition, Hondurans traditionally prefer the quality, convenience and wholesomeness of American products. Some companies are combining Honduran and American foods as an attractive tool.

C. Food Standards and Import Regulations

The principal-agent relationship in Honduras is governed by the civil and commercial codes. Supreme Decree 549 of 1977, entitled "Law of Agents, Distributors and Representatives of National and Foreign Enterprises," includes a penalty provision for wrongful termination that discourages exclusive distribution agreements. Principals may not terminate the contract without just cause, unless they fairly compensate the agent for the damages suffered. Only Honduran nationals or Honduran legal entities registered with a local Chamber of Commerce and the Ministry of Industry and Trade may represent foreign firms.

Foreigners exporting to Honduras are not required by law to sell through an agent or distributor, except when selling to the government. Although a U.S. firm may export directly to Honduran companies, appointing a local agent or representative is strongly recommended to help with import procedures, sales promotion and after-sales service. Independent intermediaries are especially important for smaller companies, as their knowledge of the market and of the relevant business customs and practices adds to the strength of the U.S. manufacturer/exporter. U.S. companies are advised to evaluate local prospects in terms of the services and benefits provided, considering factors such as location, financial strength, quality of the sales force, warehousing facilities, reputation in the market, advertising budget, product compatibility and overall experience.

To be protected under Honduran law, trademarks must be registered with the Ministry of Industry and Trade. Trademarks are valid up to 10 years from the registration date. "Notorious marks" are protected under the Pan American Convention (1917), to which Honduras is a member. Illegal registration of a notorious mark, however, must be contested in court by the original holder.

D. General Import and Inspection Procedures

Various GOH institutions have different import responsibilities. The Ministry of Public Health through the Division of Food Control (DFC) is responsible for product registration and labeling requirements. The Ministry of Agriculture and Livestock through the National Plant and Animal Health Service (SENASA) is responsible for issuing import permits and inspecting raw and processed animal and plant products, pesticides, agricultural chemicals, and veterinary products. Other institutions involved in food safety are the Consumer Protection office of the Ministry of Industry and Trade, the Consumer Protection Agency of the Attorney General's Office and the Municipalities Law, albeit on a limited scale.

Product registration. Registration of a food product is done at DFC and must be carried out by the legal representative of the importer. All processed food products must be registered and be issued a sanitary registration number, prior to their entering the country. Only samples, to be used for the registration process, will be allowed to enter the country otherwise. The DFC requires, for product registration, a Certificate of Free Sale which must be authenticated by a Honduran Consulate in the U.S. DFC regulations allow for up to 40 working days to process a product registration. It is important to keep in mind that the legal representative should go regularly to the DFC to follow up on the registration process.

Labeling Requirements are set also by the DFC. The label of any food product must comply with the labeling requirements of the Technical Norm for Labeling Processed Foods. The following information is required:

1. Product Name
2. Manufacturer Name
3. Origin
4. List of Ingredients
5. Lot number
6. Expiration date
7. Net content
8. Sanitary registration number

Additional Requirements. Food products must also adhere to the following requirements, among others:

1. Labels may be made of paper or any other material that can be attached or permanently printed on the package or container.
2. All writing on labels shall be made in a clear and legible manner and shall not fade under normal use. All inscriptions should also be made in Spanish.
3. When applicable, the label must state: "keep frozen", "for immediate consumption after opening", "artificial", "treated with radiation".

Legally, products cannot be imported into Honduras with just the standard U.S. label. Stick-on labels are allowed to fully comply with Honduran labeling requirements on product information, but not to indicate the manufacturing or expiration date. Labels must affixed prior to customs clearance and at the time of product registration, in the way the product will be sold. Stick-on labels for the manufacturing or expiration date are not accepted because they can easily be altered.

Import Procedures. In order to obtain an import permit, all importers of food products, additives, and

inputs used in food processing must submit the following documents to SENASA: Phyto-or Zoosanitary Certificate, Certificate of Origin, Pro-Forma Invoice, Pre-Application of Inspection. The Phyto-or Zoosanitary Certificate should be issued by a federal government authority (FSIS Inspector) in the plant where the food has been processed. SENASA is not accepting documents from commercial trading companies. The Pre-Application of Inspection is a request from the importer for SENASA to inspect the U.S. plant from which the product comes.

Although the import process is fairly clear for practically all products, certain difficulties often take place with sensitive products such as poultry meat. U.S. suppliers should ensure that their Honduran customers are fully aware of and in compliance with all import requirements. Imports of poultry products must come with an FSIS Certificate (Form 9060-5) with an additional declaration indicating: "the poultry product or sub-product originates in areas free of high or low pathogenic avian influenza". USDA APHIS, regularly provides updates to SENASA as to which States have suffered outbreaks of diseases and what their current status is. However, SENASA has indicated that it is the importers' as well as the exporters' responsibility to keep it updated about the health status of the area where the product originates.

At the port, the Ministry of Agriculture and Livestock has delegated to OIRSA (The Regional-International Organization for Animal and Plant Health) the responsibility of all quarantine inspections and treatment of agricultural imports. OIRSA's Plant and Animal Protection Service (SEPA) follows SENASA guidelines for requirements of raw material and processed foods imports. The SEPA Inspector, a Customs Inspector, and an Enforcement Official of the Ministry of Finance are usually involved in clearing imports of food products. In order to expedite Customs clearance all the information pertaining to the import of food items should be in Spanish. Product labels not in Spanish must be accompanied by a Spanish translation.

Prior to granting Customs clearance, the SEPA Inspector will conduct the appropriate inspection of the product. Shipments of food products with an Import Permit approved by SENASA are normally granted Customs clearance in a short period of time, ranging from a few hours to two days (depending on the work load at the port). Shipments of food products that were not registered with SENASA prior to import and do not have all the required documents are normally detained at the port of entry where product sampling is conducted. The samples will later be subject to laboratory analysis to check the physical, chemical and biological characteristics of the product.

More in-depth information on import requirements can be found in this offices' 2003 FAIRS Report at: www.fas.usda.gov/scripts/attacherep/defaults.asp.

III. MARKET SECTOR - STRUCTURE AND TRENDS

A. Entry Strategy

UN trade data shows total imports in 2001 for consumer-oriented products were \$305 million and for edible fishery products was \$10 million. Imports from the U.S. for consumer-oriented products were 36% of the import market and 25% of edible fishery product import market. Presently, there is no data available for 2002.

When selling in Honduras, U.S. exporters should bear in mind that the country is divided into two major markets: the North Coast, including San Pedro Sula, the country's commercial and industrial capital; and the Central region, where Tegucigalpa, the political capital, is located.

U.S. exporters should carefully analyze both the cost approach and the market approach when making pricing decisions. They should keep in mind the size of the Honduran market and the high elasticity of demand for consumer products, when devising marketing strategies. Price is one of the most important elements that influences the receptivity score of most Honduran imports. In many cases, Honduran businesspeople buy directly from abroad if they feel that the cost of imports available in the local market is too high.

Price escalation represents another important consideration in terms of export retail pricing. Products imported into Honduras are usually priced based on the C.I.F. value, import duties, in-country transportation costs, and distributor margins.

Because of high interest rates, importers/distributors, as well as Government of Honduras agencies, often have problems in securing the funds to purchase imports. U.S. exporters that offer attractive financing terms on sales to Honduran traders have the best chances of gaining market share. This is particularly true for large-scale projects. It is important to emphasize, however, that international firms must exercise due caution when granting credit to Honduran trading partners. Firms should investigate the creditworthiness and reputation of potential partners before granting credit.

Availability of adequate service and support frequently makes the difference in purchasing decisions, especially by the government. In general, it is important to secure sales through an established, well-known distributor that offers an adequate service infrastructure. U.S. companies should consider providing training, technical assistance, and after-sales support to their local counterparts, particularly for products that require periodic maintenance and service.

B. Food Retail Market

Honduras' retail food sector is by far the largest market for imported food. Urban consumers shop at open markets, American-style supermarkets, mini-markets, specialty stores, convenience stores, and local "mom and pop" stores (known locally as "pulperias"). Retail sales of imported consumer-oriented products are conducted mostly by supermarkets, mini-markets and convenience stores. However, the 16,000 pulperias in Tegucigalpa and 8,000 in San Pedro Sula also sell imported products, mostly snacks. The supermarket retailing industry is growing rapidly. Supermarkets have opened stores in various urban locations and most of the regularly employed population, takes advantage of promotions and buy their food at these supermarkets. Virtually all the supermarket chains are expanding, remodeling, and modernizing. Larger chains in neighboring countries have also formed strategic alliances with chains in Honduras. Local wholesale outlets and warehouse clubs have been increasing in popularity lately. PriceSmart, a U.S.-Based warehouse club, opened a store in San Pedro Sula in 1999 and another in Tegucigalpa in 2000.

Substantial opportunities exist for U.S. suppliers willing to promote their products during special times of the year and gear their promotional campaigns to the holidays. Easter, besides being a religious holiday, is also "summer vacation" time for the vast majority of Hondurans. This vacation period begins well before and extends well beyond the two-day holiday. Christmas gift baskets are also increasingly popular. In recent years, it has become common to include a high percentage of U.S. products in the basket. Most commonly included are traditional favorites such as wines, whiskey, candy and nuts. Easter and Christmas are the main peaks for retail sales. In addition, in June and December of every year the government and private sector by law provide a bonus to their employees. This bonus is equivalent to a month's salary. Many families make special purchases or buy quality products at that time.

A unique long-distance shopping tool has been developed for the 600,000 Hondurans in the U.S. who send remittances to their families. Honduran immigrants can buy a "consumption bonus" in the U.S. for their families to shop at a local Honduran supermarket. This is done through a company in Honduras that provides the bonus coupon to the person, who can take it to the supermarket where it is cashed for groceries. Also, a poultry company from Honduras has an arrangement in the U.S. for a person to buy an order of poultry and his/her family can claim it at a local supermarket.

Various marketing approaches could be developed for the different sectors. It is always important to appoint a local distributor in Honduras that can provide good market presence. However, many U.S. suppliers are discouraged by small initial volumes, and do not provide the needed support. U.S. exporters looking to establish and maintain a share of the market should be willing to go the extra mile in developing sales from the ground up and servicing their customers. They should work with their customers to satisfy local manufacturing and expiration date requirements, provide their customers with competitive pricing, credit alternatives, catalogs, and samples to test the market. They should also be willing to consider sharing advertising cost for launching new brands. Moreover, they should also be willing to provide technical and sales support as well as training in various areas such as category management, merchandising, and product handling. For further information on this sector, please read this offices' latest Retail Sector report at: www.fas.usda.gov/scripts/attacherep/defaults.asp.

C. Hotel, Restaurant and Institutional Sector

The tourism industry in Honduras has had substantial growth because the GOH and the private sector are much aware of its enormous potential. From 1999 to 2002 the growth in tourism, expenditure and hotels are as follows:

Total visitors increased by 84%, from 428,100 to 788,100

Food and drink establishments increased by 76%, from 1,941 to 3,413

Hotels establishments increased by 41%, from 558 to 785, with an increase of 3,015 new rooms available.

US Dollar income from tourists increased by 75%, from US\$195,000 to \$341,500

Cruise ship visitors increased by 168%, from 57,300 to 154,091

The new Government of Honduras has designated tourism as one of the priority sectors likely to create a substantial number of jobs and economic growth. The three main projects are Caribbean Creation, Mayan Route and Nature Adventure. Each of these projects contain several smaller groups of projects.

Caribbean Creation will encourage tourism development in the Bay Islands and the northern coast of Honduras, focusing on beaches and reefs. The goal is to attract to one million tourists and US\$500 million income in foreign exchange. At the Bay Islands, very costly, low-density tourism will be built. The German chain Kempinsky will start construction of a \$13 million ultra-luxury resort called Iguana Bay, in Guanaja which will start operations in 2004. An Italian chain, Henry Morgan, will invest in developing a resort of 412 bungalows, one SPA, Sol Melia from Spain and the Inter-Continental will do similar investments too. The Ritz Carlton is looking to develop private resorts as well.

The second project is a complete Mayan Route from Copán to other archaeological sites and will involve visitors from cruise ships flying to Copán. The World Bank has a current project to rescue five archaeological parks, which will strengthen the Mayan Route. The third project, nature adventure, is marketing and developing eco-tourism on the north shore, national parks and in the Copan ruins area. Ministry representatives held meetings exploring an extension of eco-tourism towards high-end clients who wish to participate in scientific exploration. The Barcelo chain built two hotels in La Ceiba city and a hotel complex in Omoa will be built in 2004, all in the country's north coast. The projects will be marketed for low-density, high quality, sustainable tourism.

Furthermore, in the north coast the GOH will let bids to build a cruise ship terminal in Tela. This center will also have a golf court and is being planned as a distribution point for Copán as well. The World Bank is currently developing a Coastal Sustainable Project to incorporate the ethnic population of various areas in micro-enterprises for the tourism sector.

The steps towards strengthening the tourism sector have been the accomplishment of a land titling initiative, the passage of a new Law of Incentive for Tourism, (by which businesses are exempt to pay income tax for ten years), as well as the import of equipment and vehicles free of import taxes. Other actions are the creation of a tourism police force, and the Ministers of Tourism agreed to have a common agency to promote multi-destination from Europe to Central America.

On Honduras's Bay Islands, the majority of consumer-oriented products are purchased from grocery wholesalers in Florida, particularly Miami and Tampa. The islands have several shrimp companies that export directly to those ports. Those companies also own most of the supermarkets on the islands and even some of the largest hotels. These companies send shrimp to the United States and return with U.S. consumer-oriented products and housewares.

The HRI sector has a remarkable potential for processed products. The U.S. franchises are in need of raw materials, and the local market can not always fulfill their needs. Also, some of the franchise agreements require U.S. raw materials as part of the contract. The following U.S. franchises and casual dining establishment operate in Honduras:

	Ruby Tuesday's	TGI Friday's	Tony Romas
Applebee's			
Bennigan's	Bojangles	Burger King	Church's Chicken
Domino's Pizza	Espresso Americano	Little Caesars	McDonalds
Papa John's	TCBY	Popeye	Pizza Hut
Price Smart	Start Mart	Subway	Wendy's
Crowne Hotel	Holiday Inn Hotel	Marriot Hotel	Cinnabon

Large U.S. food service suppliers have entered Honduras and are helping their local representatives develop the market. However, sourcing food and beverage products from a wide array of suppliers are still quite common in the sector. The same basic market entry approach described for the retail sector also applies to the HRI food service sector. Distribution to the HRI industry is still a little weak, there is not enough competition to force quality or competitive pricing. U.S. companies are encouraged to help develop a distributorship that handles the HRI industry.

D. Food Processing Sector

Domestic food processing is a small yet growing industry in Honduras. The industry is composed of two distinct segments. The first segment of the industry is made up of a rather large number of small and unsophisticated entrepreneurs throughout the country which produce baked products, dairy products, meat products, honey, certain prepared fruit products and others. Honduras lacks production of canned fruits and vegetables as well as chocolate products. As many domestic food processors seek to improve the quality of their products, and with the lifting of major trade restrictions, food additive imports are also beginning to experience some growth. The second sector is made up of several medium to large scale operations with relatively modern production and marketing facilities. These businesses produce pasta products, sauces, vegetable oil and shortening, cookies and biscuits, certain snack foods, fruit juices, soft drinks, beer, tortilla flour, meat products, and dairy products. This segment is struggling to modernize and develop in order to remain competitive, particularly in relation to imports from neighboring countries and Mexico. Perhaps the best approach in this sector is working closely with the local manufacturers who know consumer tastes and preferences for their products. Providing their customers with technical assistance in diversifying product variety can be invaluable in increasing sales of different ingredients.

This sector presents an ideal opportunity for joint ventures. Many wealthy citizens, who have taken big losses in coffee but still have sufficient capital for investments are looking for alternative opportunities to invest their money. The advantages of setting up shop in Honduras is that it opens up all of Central America for the finished goods with zero duties.

IV. BEST HIGH VALUE PRODUCTS PROSPECTS

The following is a list of product categories with the best export potential for U.S. suppliers based on recent export performance, relative ease of entry, and developing trends.

BEST PROSPECTS TABLE

Product/Sector	Imports from All Countries Million US\$	Imports from the U.S. Million US\$	U.S. Market Share	Projected Growth Rate
Meat Fresh/Chilled, Frozen	9,978	7,884	79%	12%
Meat Prepared/Preserved	11,165	4,760	43%	8%
Cheese	8,643	2,710	31%	8%
Processed Fruit & Vegetable	22,309	6,606	30%	10%
Fresh Fruit	8,879	5,908	67%	10%
Fruit & Vegetable Juices	12,451	2,529	20%	5%
Wine & Beer	5,213	3,667	70%	10%
Pet Foods	2,764	2,321	84%	13%
Snack Foods	19,086	3,792	20%	6%
Tree Nuts	179	172	96%	15%
Poultry Meat	6,097	3,301	54%	8%
Eggs	6,798	1,635	24%	10%
Nursery Products & Cut Flowers	149	41	28%	10%
Salmon	78	54	69%	10%
Surimi	26	25	96%	10%
Ground Fish & Flat Fish	44	44	100%	10%
Molluscs	59	49	83%	10%

Source: United Nations Trade Data

V. POST INFORMATION

Institution: Office of Agricultural Affairs, American Embassy
Address: Avenida La Paz, Tegucigalpa, Honduras
Tel: (504) 236-9320 ext. 4354, 4544
Fax: (504) 236-8342
E-mail: AgTegucigalpa@fas.usda.gov
Alternate: Usdafas@usmission.hn

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

VI. LIST OF MAJOR REGULATORY AGENCIES

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VII. APPENDIX I. STATISTICS

A. KEY TRADE AND DEMOGRAPHIC INFORMATION

Product Imports	From all Countries	From the U.S.	U.S. Market Share
Total Agricultural	\$537 Million	\$273 Million	51%
Consumer-Oriented	\$305 Million	\$109 Million	36%
Edible Fishery	\$10 Million	\$ 3 Million	25%

Population	Total 2002 In Millions	Annual Growth Rate
Total Population	6.7	2.6%
Urban Population	3.1	3.8%
Size of Middle Class 1/	0.7	2.6%

Number of Major Metropolitan Cities 2/	11
Gross Domestic Product (Billions of US\$)	\$6.6
Per Capita Domestic Product	\$1,067
Unemployment Rate /3	3.8%
Female Population Employed /4	39.1%
Exchange Rate (US\$1 = Lempiras) 5/	L. 17.95

1/- Number of people living in households with monthly incomes between L5,000 and L10,000 (US\$ 278 to \$557). Actual size of the middle class may be close to 1 million if the definition is expanded to include households with monthly incomes of up to L15,000 (US\$ 836) and considering the high rate of people (8%) that do not complete government surveys.

2/- Populations in excess of 100,000

3/- Open unemployment is low; however, underemployment approaches 27%

4/- Percent of women who are part of the economically active population.

5/- Official

B. Consumer-Oriented and Edible Fishery Products Imports

Honduran Imports	Imports from the World Millions US \$			Imports from the U.S. Millions US \$			U.S. Market Share Percent		
	1999	2000	2001	1999	2000	2001	1999	2000	2001
CONSUMER-ORIENTED TOTAL	244	277	305	100	93	109	41	34	36
Snack Foods (Excl. Nuts)	15	18	19	3	3	4	18	19	20
Breakfast Cereals & Pancake Mix	19	22	18	2	2	2	10	11	12
Red Meats, Fresh/Chilled/Frozen	5	6	10	3	4	8	56	69	79
Red Meats, Prepared/Preserved	9	9	11	4	4	5	45	50	43
Poultry Meat	4	10	6	2	1	3	43	15	54
Dairy Prod (Exc. Cheese)	40	40	41	11	9	6	27	24	14
Cheese	4		9	2	2	3	52	24	31
Eggs & Products	7	9	7	1	1	2	7	7	24
Fresh Fruit	6	7	9	4	4	6	67	60	67
Fresh Vegetables	3	3	5	1	1	1	36	37	22
Processed Fruit & Vegetables	17	18	22	8	9	7	48	49	30
Fruit & Vegetable Juices	8	12	12	2	3	3	25	27	20
Tree Nuts	1	1	1	1	1	1	78	57	96
Wine & Beer	4	4	5	3	2	4	73	62	70
Nursery Products & Cut Flowers	2	1	1	1	1	1	13	9	28
Pet Foods (Dog & Cat Food)	1	2	3	1	1	2	75	82	84
Other Consumer-Oriented Products	101	110	127	54	44	55	54	40	43
FISH & SEAFOOD PROD.	14	14	10	6	6	3	47	45	25
Salmon	1	1	1	1	1	1	94	98	69
Surimi	1	1	1	1	1	1	100	74	96

Crustaceans	9	11	8	4	5	2	49	48	28
Ground Fish & Flatfish	1	1	1	1	1	1	18	78	100
Molluscs	1	1	1	1	1	1	96	54	83
Other Fishery Products	5	3	2	2	1	1	52	47	10
Agricultural Total	443	473	573	223	223	273	52	47	51
Ag Fish & Forestry Total	456	506	558	233	235	278	51	47	50

Note: Data for 2002 is not available

Source: United Nations Trade Data

C. Top 15 Suppliers of Consumer Foods and Edible Fishery Products**HONDURAN IMPORTS****CONSUMER ORIENTED AG**
(\$1000)

	1999	2000	2001
United States	100,023	92,933	109,196
El Salvador	37,328	49,980	45,462
Guatemala	38,006	43,682	39,754
Mexico	20,230	25,622	26,100
Costa Rica	7,933	13,139	21,107
New Zealand	7,881	9,349	8,366
Chile	5,967	5,032	11,194
Nicaragua	3,218	9,205	8,019
Netherlands	7,050	4,967	4,940
Canada	3,892	3,866	4,571
Panama	1,497	1,519	3,014
Denmark	1,182	1,082	2,084
Ireland	1,237	886	695
Uruguay	797	9,109	10,243
Brazil	782	324	662
Other	6,882	6,681	9,698
World	243,905	277,286	305,105

FISH AND SEAFOOD PRODUCTS
(\$1000)

	1999	2000	2001
United States	6,339	6,431	2,547
Panama	3,570	5,341	4,557
Thailand	312	827	1,098
Norway	83	387	0
Colombia	535	377	326
Costa Rica	1,533	326	625
Nicaragua	34	172	220
Mexico	90	127	311
El Salvador	251	62	378
Ecuador	139	49	71
Morocco	99	49	50
Taiwan	207	20	0
Chile	4	2	25
Japan	47	0	74
India	0	0	22
Cuba	1	6	3
Other	258	252	5
World	13,502	14,428	10,312

Note: Data for 2002 is not available

Source: United Nations Trade Data