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Report Highlights:

The economy relies on foreign exchange generated by international trade, remittances, and the tourism sector. The Government of Guatemala (GOG) welcomes foreign investment and generally places few legal or regulatory restrictions on foreign investors. Guatemala represents a growing market for U.S. companies and is a country with economic stability, a strategic location with ports on both the Atlantic and Pacific Oceans, and a proximity to the United States. U.S. exports of agricultural products to Guatemala reached a record of \$1.2 billion in 2019. The COVID-19 pandemic might reverse the trend of import growth in 2020; however, economists expect that the Guatemalan economy will pick-up in 2021. Some of the most important exported agricultural products to Guatemala are yellow corn, wheat, soybean meal, and poultry, beef, and pork meat.

MARKET FACT SHEET: GUATEMALA

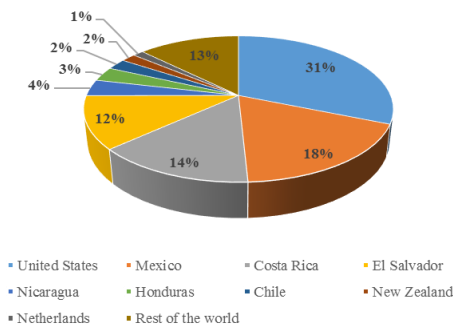
Executive Summary

Guatemala has the largest population in Central America with nearly 15 million inhabitants. It is the horticultural hub of Central America. The United States is Guatemala's largest trading partner, and Guatemala is a net importer. After 14 years of the Dominican Republic-Central America Free Trade Agreement (CAFTA-DR), almost all U.S. agricultural products enter duty free and nearly all remaining tariffs will be eliminated over the next two years. The United States is the largest agricultural product supplier to Guatemala, accounting for 42 percent of the market.

Imports of Consumer-Oriented Products

Around 31 percent of consumer-oriented agricultural products imported to Guatemala are from the United States, followed by Mexico with 18 percent, Costa Rica with 14 percent, and El Salvador with 13 percent. In 2019, Guatemala imported \$1.8 billion from the world and \$567 million from the United States.

Guatemala Consumer-Oriented Products Imports from the World 2019



Food Processing Industry

The food processing industry is divided into different sub-sectors, led by non-alcoholic beverages and preserved foods. These two sub-sectors represent 40 percent of total national production, followed by baked goods, which account for 15 percent of total processed product exports. Guatemala is a major importer of raw materials and ingredients for food processing. The United States offers consistent and high-quality ingredients for Guatemala's food processing industry.

Food Retail Industry

The retail sector in Guatemala is dominated by three supermarket chains: Walmart, La Torre, and Pricesmart. These supermarkets mainly target middle and high-income consumers. However, there are still many opportunities in the retail sector. Only 30 percent of food sales are in supermarkets. Other consumers still rely on open-air markets and corner stores.

Quick Facts CY 2019

Imports of Consumer-Oriented Ag Products from the U.S.: **\$567 million.**

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

- | | |
|--------------------------------------|----------------------------------|
| 1) Poultry Meat & Products (\$132.4) | 5) Beef & Beef Products (\$36.9) |
| 2) Dairy Products (\$59.9) | 6) Prepared Foods (\$35.1) |
| 3) Pork & Pork Products (\$59.7) | 7) Wine & Beer (\$29.5) |
| 4) Processed Vegetables (\$41.2) | 8) Fresh fruits (\$25.3) |
| | 9) Snack foods (18.9) |
| | 10) Cond & Sauces (\$17.6) |

Guatemalan Ag imports from the U.S.: \$1.3 billion

Guatemalan Ag exports to the U.S.: \$2.1 billion

Population (millions): 15

GDP (USD): \$138.3 billion - GDP per capita (USD, PPP): \$4,535

Top Retailers in Guatemala:

- | | | |
|---------------|-----------------------|-------------|
| 1. Walmart | 4. Tiendas del Barrio | 7. Super 24 |
| 2. Unisuper | 5. La Barata | |
| 3. Pricesmart | 6. Save A Lot | |

Strengths	Weaknesses
COVID-19 decreased sales to hotels and restaurants and, many food service importers began supplying imported food products to small businesses and directly to consumers.	Guatemala City has the largest purchasing power and is where market competition is the strongest.
E-commerce increased by more than 20 percent in 2020 during the first months of lockdown.	Domestic production of consumer ready products is strong and advertisement is strong on social media.
Large supermarket chains, fast food restaurants, and delivery apps, are working together to offer more home food deliveries.	Insecurity is still a concern and some areas are considered red zones.

Source: BICO, Trade Data Monitor

SECTION I. MARKET OVERVIEW

Market Research

Guatemala is Central America's largest economy, accounting for almost one-third of the region's gross domestic product (GDP). In 2019, Guatemala's GDP was \$81.3 billion, and agriculture is one of the main economic drivers accounting for 13.5 percent of GDP and 31 percent of the labor force. The economy relies on international trade, especially exports of goods to the United States and other Central American countries, remittances from the United States, and tourism.

The COVID-19 pandemic has severely affected the tourism sector. Many tour operators, small hotels, and restaurants had to close their businesses, and although internal tourism has been promoted since October 2020, the tourism authorities report that by the end of 2020, there will be an estimated reduction of approximately 67 percent of international visitors, and a 67 percent loss in revenues from those visitors. Many foodservice importers cater to the hotel and restaurant sector, but due to the disproportionate impact of the pandemic on this economic sector, importers switched their business operations and began to sell their products directly to consumers by implementing home deliveries.

Guatemala is expected to receive a total of \$11 billion in remittances in 2020, mainly from Guatemalans living in the United States. This means that for the first time, remittances will surpass agricultural exports, which are expected to be worth \$10.5 billion.

Guatemala has one of the most unequal income distributions in the Western Hemisphere with the richest 20 percent of the population accounting for more than 51 percent of Guatemala's overall wealth. More than half of the 15 million inhabitants live below the national poverty line, and poverty is mostly concentrated in the Western Highlands. Guatemala City, with a population of around five million, is the business hub and has most of the economic activity and job opportunities.

U.S. firms that export to Guatemala must understand that market conditions are strongly affected by income distribution and there is a major difference in consumer taste and purchasing decisions between Guatemalans who live in the interior of the country (with the exception of the tourist areas in Antigua, Panajachel, and Puerto Barrios) and those who live in Guatemala City.

U.S. food products are competitively priced and are distributed to both high- and middle-income consumers. Other U.S. food products such as grains, poultry (chicken leg quarters), fats and oils, and preserved foods are oftentimes cheaper than domestically produced products.

Advantages and Challenges in the Market Facing U.S. Exporters

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.
Most imported products from the United States enter duty-free thanks to CAFTA-DR.	FTAs with various countries create strong competition.
Low cost transportation of goods thanks to the proximity of U.S. ports. U.S. suppliers can export smaller quantities at competitive prices.	Many Guatemalan importers prefer that U.S. suppliers export their products through Miami to consolidate their products and reduce transportation costs.

Supermarket chains open stores every year and mostly in the interior of the country. These new stores sell domestic products and imported goods.	Registration is always a concern to importers because it takes more than two weeks to issue import permits to importers.
Guatemala, El Salvador, and Honduras signed the customs union among the three countries.	The harmonization of technical standards could restrict access for U.S. products.
The growing food processing industry is looking for quality food ingredients for ready-to-eat products, bakery, deli meats, beverages, and snacks.	Lack of cold chain procedures, and limited infrastructure and distribution for perishable products.
Guatemala is unable to 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.
Shipping products from the U.S. is cheaper and quicker than shipping products from Europe.	Guatemala is in the process to implement the on-line products registration system.
Guatemalan food processors require imported bulk commodities, intermediate, and consumer-oriented ingredients to produce processed products for the domestic market and for exports to the world.	New Central American Technical Regulations are being implemented for importing food products and require U.S. companies to comply with more paperwork prior to entering the local market.

Guatemala implemented temporary restrictions from the beginning of the COVID-19 pandemic, which were effective mainly from March through October. These restrictions greatly affected the hotel, restaurant, and institutional sectors (HRI) because of the implementation of curfew hours and the closure of the international airport and borders, which affected international tourism. Importers and food distributors in the HRI and catering sectors adjusted to service the retail sector and implemented home delivery service for direct sales to consumers. Food sales at the retail level did not experience severe effects, as they were able to immediately adapt to on-line sales and provide grocery delivery services throughout the country.

The restaurants that fared the best were those that quickly adapted to social distancing measures and offered consumers home delivery services, readymade meals, and meals designed to be quickly re heated and served at home. Technology also played a main role in advertising these services through social media channels. The top on-line food delivery apps available in Guatemala are Glovo, Hugo, and Uber Eats.

Changes in the Guatemalan market due to COVID-19

- Increase in demand for grains and frozen foods
- An increased demand for: flours, canned tuna, frozen prepared meals, yogurt, beans, and rice
- Food service importers began supplying imported food products to small businesses.
- E-commerce increased by more than 20 percent during lockdown.
- Chefs have live cooking classes through social media.
- High-end restaurants offer “cook at home boxes,” delivering ingredients and instructions on how to prepare specialty dishes at home.

SECTION II. EXPORTER BUSINESS TIPS

Local Business Customs and Trends

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

Most businesses conducted in Guatemala are based on:

- Before COVID-19, personal relationships were preferred by Guatemalans when doing business. Business executives and government officials placed great importance on personal contacts with suppliers. However, in 2020, both business executives and government officials were willing to have virtual meetings and attend virtual events and trainings in order to comply with social distancing measures. Under normal conditions, U.S. suppliers should be prepared to have a local representative or distributor and be prepared to travel to Guatemala when possible. U.S. business people often are surprised at the accessibility of 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 customer service to their buyers, agents or distributors.
- Guatemalan importers normally will require samples of products: potential buyers request U.S. companies to provide support on marketing efforts of new products, and when placing orders for products, they will require specific volumes of products; meeting these requirements will result in successful business relationships.

Importer lists are available from the Foreign Agricultural Service for use by exporters of U.S. food and beverage products. In addition, around 22 U.S. cooperator and trade groups are present in Guatemala and can assist U.S. companies; these groups work under USDA-funded programs. To find a list of USDA cooperators, please visit www.fas.usda.gov/pcd/PartnersSearch.aspx

Consumer Taste s and Preferences

Culturally speaking, Guatemalans have adopted much of the U.S. culture, such as music, sports, fashion, and fast food. Through remittances sent by Guatemalans in the United States, local food tastes are changing, and more high-value foods are now preferred. In addition, many Guatemalans that travel to the United States on business or tourism are introduced to American food products; therefore, consumers prefer U.S. products as they are viewed as being of higher quality.

Imported refrigerated and frozen ready-to-eat products are increasing their shelf space at the larger supermarkets. These imported products share the space with local processed products such as tacos, tortillas, burritos, beef and chicken patties, chicken nuggets, and corn-based tamales, which are among the preferred foods because they are easy to cook and have affordable prices.

Guatemalans have also followed the trend towards healthy eating and are now demanding foods with less sugar, saturated fats, and cholesterol. This trend also includes organic products, sold and distributed mainly through specialized stores. Around 90 percent of the organic products are imported, and these products include processed fruits and vegetables, juices, energy drinks, cooking oils, dairy, tree nuts, snacks, breakfast cereals, condiments & sauces, confectionary products, and chicken. Most Guatemalan consumers are price sensitive; however, the organic consumers are the exception, as they do not see price as an issue when making purchasing decisions.

The food truck business started in 2016 with approximately fifteen companies that own 1-3 trucks. These companies offer a wide variety of foods and beverages such as, gourmet style coffees and teas, sandwiches, tacos, hot dogs, pizzas, hamburgers, and international cuisine (Chinese, Mexican, French, and Italian, Japanese, and Mediterranean food.) Due to current social distancing measures, food trucks are not operational as they rely on populated pedestrian areas or catered social events, both of which are prohibited.

This sector has an association that legally represents the group of companies that own a food truck. The association was working with the Municipality of Guatemala to find a public space that will be a permanent location for the trucks, and it was expected to have all permits authorized by the end of 2020, but the process was detained and it is expected to continue in 2021.

SECTION III: IMPORT FOOD STANDARDS & REGULATIONS / IMPORT PROCEDURES

Documents Generally Required by the Country Authority for Imported Food

The first step to import food products in Guatemala is to register a product. Any producer, processor, packer, or distributor operating in Guatemala must operate under a sanitary license issued by the Ministry of Public Health's Food Control Division. Both the importers and the imported product must be registered. Product registration is required for all packaged food products in Guatemala.

For additional information on import regulations and standards please refer to the FAIRS Report 2020 at <https://gain.fas.usda.gov/#/search>

Spanish Language Labelling Requirements

Spanish language labelling is required by the office of Food Control at the Ministry of Public Health. This is the government agency responsible for all registrations of processed products. Regulations and registration procedures and requirements are available at their on-line site or see the FAIRS report referenced above: <https://www.mspas.gob.gt/index.php/component/jdownloads/category/252-control-de-alimentos?Itemid=-1>

Tariffs and FTAs

The Dominican Republic-Central America Free Trade Agreement (CAFTA-DR) entered into force in Guatemala on July 1, 2006. CAFTA-DR has led to an increase in bilateral trade between Guatemala and the United States over the past ten years. In 2019, the United States exported a total of \$1.2 billion of agricultural products to Guatemala. Some of the most important exported agricultural products to Guatemala are yellow corn, wheat, soybean meal, and poultry meat. The United States and the rest of Central American countries are the main trade partners with Guatemala.

Besides CAFTA-DR, Guatemala has free trade agreements (FTA) with Central America (including Panama), Colombia, Mexico, Dominican Republic, Taiwan, Chile, and the European Union (EU.) These negotiations, but specifically the FTA with the European Union, are forcing greater integration within the Central American Customs Union.

The customs union between Guatemala and Honduras started in June 2017 and as of December 7, 2018; El Salvador is part of the customs union. El Poy is the integrated border of the three countries and authorities believe that this customs union will turn the Central America northern triangle into the eighth strongest economy in Latin America. With this union, most import tariffs will be harmonized to facilitate cross-border trade and eliminate opportunities for triangulation of imports.

For information about the different FTAs signed by the Guatemalan government, please visit:

<https://www.mineco.gob.gt/node/678>

Trademarks and Patents Market Research

For more information please read the Foreign Commercial Service Country Commercial Guide:

<https://www.export.gov/article?id=Guatemala-Protecting-Intellectual-Property>

SECTION IV: MARKET SECTOR STRUCTURE AND TRENDS

Food Retail

The retail sector in Guatemala is dominated by two supermarket chains, Walmart Mexico and Central America, with a retail value share of 51 percent, followed by Unisuper (La Torre/Econosuper), with 21.5 percent of retail value share. These supermarkets target middle- and high-income consumers and low to mid-low-income consumers. There are still many opportunities in the retail sector since only 30 percent of total food sales are made by supermarkets. This opportunity is also an advantage for the informal retailers who are mostly concentrated in the rural areas of the country and mainly attract low-income and mid-income consumers. According to Euromonitor, in 2019, sales at the supermarkets increased 6 percent from 2018 and totaled \$3.4 million.

The higher end consumers are shoppers that buy groceries in the supermarkets on a weekly basis, as they have higher disposable incomes and value the service that modern channel retailers provide. For the past 8 years, Guatemala has built many apartment buildings in the high-end neighborhoods; this new living concept is causing shoppers to look for convenience stores that have quick and easy access to purchase items in smaller amounts than what they would usually purchase at the larger supermarkets. The middle and low-income consumers still prefer to buy groceries at the open-air markets or corner stores nearby their neighborhoods, which are mostly run by the informal markets. Customers prefer these stores because they can find products sold in smaller sizes, which are more convenient for those who do not own refrigerators and due to the lower price.

Before COVID-19, online shopping was not a common purchasing method and was not very popular among shoppers, as only a few supermarkets offered this service and only at certain stores.

A few days after the first case of COVID-19 in Guatemala, the Government of Guatemala announced restrictions on movement and activities to prevent the spread of the virus. These restrictions limited store hours and the number of customers allowed inside the stores. These restrictions led to shoppers looking to online shopping as a new purchasing method to avoid the exposure to the virus. For more information about the supermarket sector in Guatemala, read the Retail Report 2020 at:

<https://gain.fas.usda.gov/#/search>

Food Processing

Guatemala is a major importer of raw materials and ingredients, used by local companies for further processing for both domestic consumption and exports to the world. Guatemalan non-alcoholic beverages and preserved foods are the two leading sub-sectors and represent 40 percent of the total national production, followed by baked goods with 15 percent of total exports of processed products. The main processed products exported to the United States include corn-based foods, snacks, alcoholic drinks, and preserved foods, dehydrated products such as broths, and fruits for beverages.

The areas with the most growth potential for the food processing industry are:

Industry	Products
Processed meats:	mechanically separated poultry; boneless pork picnic; pork bellies, trimmings and offals; flours (fillers); animal fats
Beverages:	fruit concentrates and nectars; drink bases and syrups; soy flakes and soy powder; artificial fruit flavors
Snacks:	dehydrated potato flakes and powder; soy flakes; nuts; fresh potatoes; fruit fillings; raisins; pork rind; whey powder, protein concentrates; corn; rice.
Soups and Broths:	dehydrated potato flakes and powder; soy flakes; dehydrated vegetables; condiments

For more information about the supermarket sector in Guatemala, read the Food Processing Report 2020 at: <https://gain.fas.usda.gov/#/search>

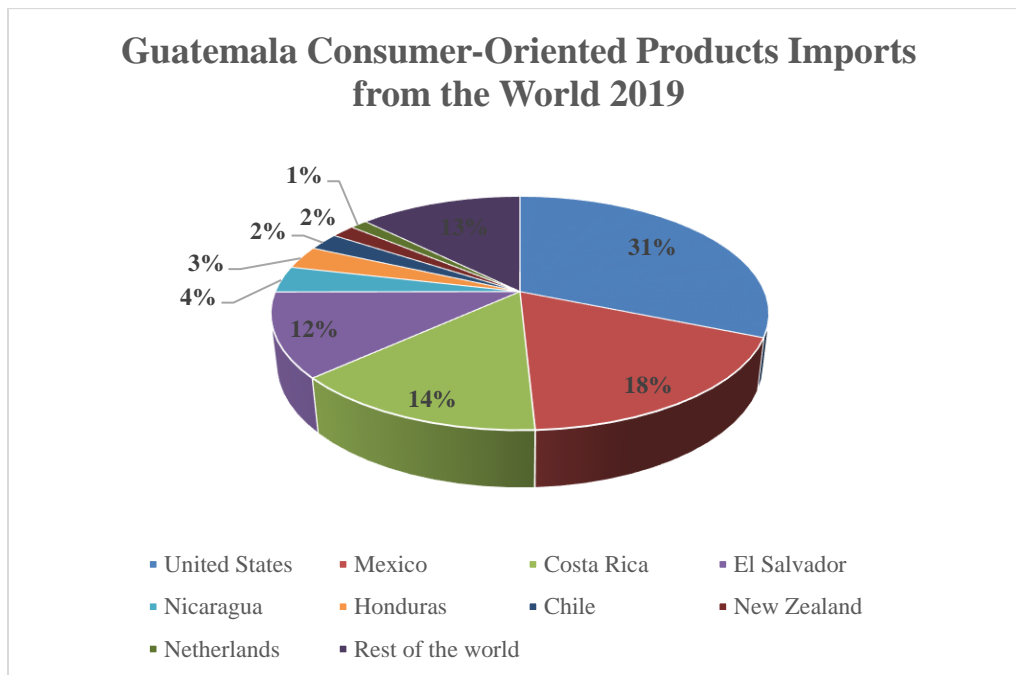
Hotel & Restaurant

Guatemala represents a great opportunity for the foodservice industry as most of the population is young and is very familiar with imported food products. The food and beverage (F&B) sector in Guatemala accounts for 5 percent of total GDP, with some 1,200 active companies. The F&B sector generates more than 110,000 direct jobs at food processing companies and in the hospitality industry, and approximately 600,000 indirect jobs in the informal economy. According to the International Labor Organization, in Guatemala it is estimated that around 3.5 million jobs could be lost during the COVID-19 pandemic, including workers in the F&B sector. The food and beverage industry presents promising opportunities for new products sought by health-conscious consumers, or products designed for consumers who require specialty foods for medical purposes or specific nutritional or dietary needs.

The Guatemalan market is constantly adapting as consumers follow food trends that are popular in other countries around the world. For more information about the supermarket sector in Guatemala, read the Hotel, Restaurant & Institutional Report 2020 at: <https://gain.fas.usda.gov/#/search>

Competitive Situation

The major competitors with the United States in consumer-oriented products imports in Guatemala are Mexico with 18 percent market share, Costa Rica with 14 percent market share and El Salvador with 12 percent market share.



U.S. products that face competition from other countries in the Guatemalan market are:

Guatemala Imports from United States 25 Top Consumer-Oriented Products Calendar Year: 2017 - 2019				
HS Subheading	Description	January - December (Value: USD)		
		2017	2018	2019
020714	Chicken Cuts and Edible Offal (Including Livers) Frozen	100,090,626	102,254,505	111,328,943
210690	Food Preparations Nesoi	42,067,337	39,971,746	55,349,259
020329	Meat Of Swine, Nesoi, Frozen	25,748,445	28,062,365	32,586,244
200410	Potatoes, Including French Fries, Prepared Or Preserved Otherwise Than By Vinegar Or Acetic Acid, Frozen	27,177,538	29,878,357	32,082,369

020230	Meat Of Bovine Animals, Boneless, Frozen	24,341,316	23,440,906	26,900,102
040620	Cheese Of All Kinds, Grated Or Powdered	13,423,543	15,447,478	19,260,675
160249	Meat, Meat Offal Or Mixtures Of Swine, Prepared Or Preserved, Nesoi	15,030,348	14,414,395	17,213,754
210390	Sauces And Preparations Therefor, Nesoi; Mixed Condiments And Mixed Seasonings	14,345,994	14,524,967	14,799,007
040690	Cheese, Nesoi, Including Cheddar And Colby	11,177,174	14,172,441	13,913,131
080810	Apples, Fresh	11,654,746	13,967,330	13,771,781
080610	Grapes, Fresh	10,697,995	11,069,023	12,933,069
160100	Sausages And Similar Products, Of Meat, Meat Offal Or Blood; Food Preparations Based On These Products	11,040,309	10,241,176	11,706,076
220290	Nonalcoholic Beverages, Nesoi (Including Milk-Based Drinks And Nonalcoholic Beer)	10,008,357	8,643,837	11,500,297
220300	Beer Made From Malt	4,062,615	7,420,172	10,493,889
230910	Dog And Cat Food, Put Up For Retail Sale	10,322,254	9,435,260	10,351,888
190120	Mixes And Doughs For The Preparation Of Bread, Pastry, Cakes, Biscuits And Other Bakers' Wares Of Heading 1905	7,048,307	8,631,017	10,165,240
210320	Tomato Ketchup And Other Tomato Sauces	6,175,067	7,518,546	8,310,701
180690	Cocoa Preparations, Not In Bulk Form, Nesoi	7,253,863	5,938,058	8,068,267
020130	Meat Of Bovine Animals, Boneless, Fresh Or Chilled	4,555,863	7,565,782	6,738,575
160232	Prepared Or Preserved Chicken Meat, Meat Offal Or Blood, N.E.S.O.I.	3,092,542	5,491,944	6,432,663
190590	Bread, Pastry, Cakes, Biscuits And Similar Baked Products, Nesoi, And Puddings, Whether Or Not Containing Chocolate, Fruit, Nuts Or Confectionary	5,796,799	5,829,056	6,218,649
180631	Chocolate And Other Cocoa Preparations In Blocks, Slabs Or Bars, Weighing 2 Kg Or Less, Filled	7,276,925	8,258,094	5,980,772
200520	Potatoes, Nesoi, Prepared Or Preserved Otherwise Than By Vinegar Or Acetic Acid, Not Frozen	4,537,071	6,322,873	5,962,327
020322	Meat Of Swine, Hams, Shoulders And Cuts Thereof With Bone In, Frozen	3,053,515	4,592,747	5,568,455
200819	Nuts (Other Than Peanuts (Ground-Nuts)), And Other Seeds, Including Mixtures, Prepared Or Preserved, Nesoi	4,413,175	4,645,093	5,042,559
020727	Turkey Cuts And Edible Offal (Including Liver) Frozen	4,621,746	4,780,303	4,947,131

SECTION V: AGRICULTURAL AND FOOD IMPORTS

Agricultural & Food Import Statistics (in millions of dollars)

Product	2015	2016	2017	2018	2019
Consumer Oriented	366.8	385.4	416.6	440.6	501.2
Bulk	393.0	396.5	369.6	467.9	438.3
Intermediate	315	305	314.8	353.8	340.5
Agricultural Related Products	16.1	14.8	19.1	18.2	12.1
Total Agricultural & Related Products	1,091	1,101.6	1,120.2	1,280.6	1,292.2

For a detailed report, please visit: www.fas.usda.gov/gats/BicoReport.aspx?type=country

Five Best Consumer-Oriented Product Prospects Categories (in thousands of dollars)

Product Category	2015	2016	2017	2018	2019
Food Preparations (baking inputs & bev. Bases)	72,967	88,913	87,822	63,403	70,870
Fats & Oils	41,370	41,143	55,194	68,674	70,581
Processed/Prepared Dairy Products	24,075	28,478	33,395	40,850	47,759
Processed Vegetables & Pulses	32,723	29,890	33,736	36,521	41,063
Prepared/Preserved Meats	33,408	29,350	33,162	36,152	39,086

For a detailed report, please visit: www.fas.usda.gov/gats/BicoReport.aspx?type=country

SECTION VI: KEY CONTACTS AND FURTHER INFORMATION

Links to government sources:

Ministry of Agriculture, Livestock, and Food – Sanitary & Phytosanitary Import Requirements - www.maga.gob.gt

Ministry of Economy – CAFTA-DR import tariffs - www.mineco.gob.gt

Ministry of Health- Food Control Administration - www.mspas.gob.gt

Guatemalan Tax Authority – Customs - <https://portal.sat.gob.gt/portal>

For questions or comments regarding this report, or assistance exporting to Guatemala, please contact the Foreign Agricultural Service. Importers listings are available from the Foreign Agricultural Service for use by U.S. exporters of U.S. food and beverage products.

Foreign Agricultural Service – Guatemala

U.S. Department of Agriculture

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Attachments:

No Attachments