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Report Highlights:

U.S. trade data indicates that U.S. exports of consumer-oriented and edible fishery products to Honduras reached a new peak in U.S. fiscal year 1999 at US\$60 million. U.S. exports to Honduras in these categories increased by 18 percent in FY 1999 and had more than doubled from 1995 levels. Rapidly developing retail and FRI (hotel/restaurant/institutional) sectors should continue to fuel the upward trend in U.S. exports to Honduras in the coming years.

Includes PSD changes: No
Includes Trade Matrix: No
Unscheduled Report
Guatemala [GT1], HO

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SECTION I. MARKET OVERVIEW

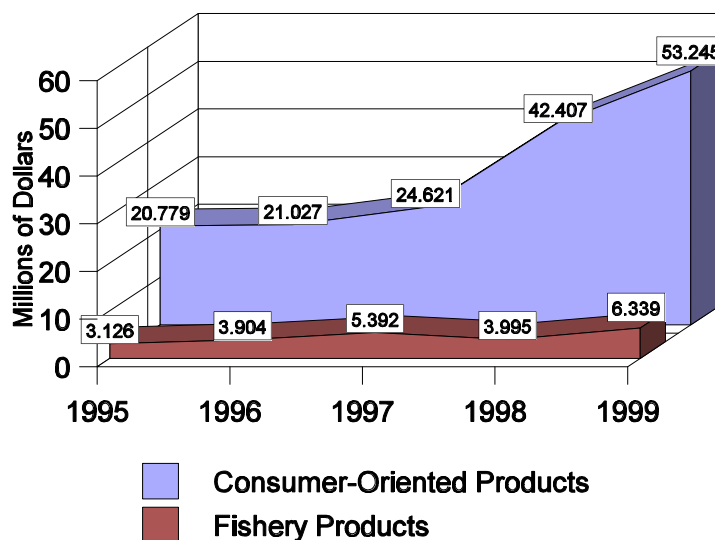
After three quarters of robust economic growth in 1998, Hurricane Mitch struck Honduras during the last days of October 1998. In addition to the catastrophic human losses caused by the hurricane, at least five thousand lost their lives while nearly 40% of the population of six million was directly affected by the storm, Mitch dashed Honduras' hopes for a sustained economic expansion. The hurricane is estimated to have caused \$3 billion in damages to the Honduran economy, equal to about 21% of annual GDP.

In 1999 the economy ended up with a GDP decrease of 1.9%. However, after the tremendous efforts by both the central government and international cooperation, the Honduran economy is bouncing back. The Central Bank estimates the economic growth for the year 2000 will be 5%. IMF is also estimating a recovery for Honduras, estimating GDP growth between 4% and 5% for this year.

Despite the slow down in the economy, imports of consumer-oriented products continued their upward momentum, reaching \$244 million in 1999. Strong demand, and considerable investment and development in the retail and HRI sectors is encouraging greater imports from all sources, and particularly from the U.S. Another important factor is that since 1994, Honduras has made great strides in opening its markets to foreign trade and foreign investment. Import duties, which had ranged as high as 140%, have been decreased to between 1% and 20% for almost all products. Surcharges,

customs administrative charges and consular fees have been abolished. Honduras has also done away with most non-tariff barriers to trade, including import licensing requirements. Duties on imports of raw materials have been reduced to 1 percent, and the administrative customs charge was eliminated for raw materials in 1998. This progressive trade liberalization has been largely responsible for propelling U.S. exports to Honduras from \$627 million in 1991 to \$2.7 billion in 1999, according to U.S. trade data. For the year 2000, consumer-ready products are already showing an upward trend. Trade information shows an increase of almost 4% over last years level for the first half of the year. U.S. exports of consumer-ready products to Honduras by end of June 1999 were \$25 million, and by end of June of 2000 they were \$26 million.

Exports of Selected U.S. Products to Honduras



* Based on trade data from the U.S. Bureau of the Census

With annual per capita income of less than \$800, it is no surprise that a large share of income goes to food purchases. In rural areas it is estimated that close to 75% of family income goes to buy food while in urban areas it is closer to 50%. Consequently, for food and beverage products,

price is the most important selling point in Honduras. Although more and more women are entering the work force every day, particularly in drawback operations, women remain the main decision makers when it comes to food purchases. U.S. products are often preferred based on quality, wholesomeness, and variety.

Monthly Household Income			
Lempiras	U.S. Dollars 1/	No. of Households	Percentage
Up to 100	Up to 6.80	13,912	1.23
101 to 250	6.81 to 17.00	32,410	2.86
251 to 500	17.01 to 34.01	72,267	6.38
501 to 1,000	34.02 to 68.03	142,789	12.60
1,001 to 2,500	68.04 to 170.07	333,197	29.40
2,501 to 5,000	170.08 to 340.14	249,234	21.99
5,001 to 10,000	340.15 to 680.72	134,395	11.86
10,001 and more	680.73 and more	62,852	5.55
Unreported Income		92,153	8.13
TOTAL		1,133,209	100.00

1/ - Exchange rate: U.S. Dollars 1.00 = Lempiras14.88

Source: Household Survey, Statistics & Census Directorate, March 1999.

Advantages	Challenges
<p>— Close proximity to U.S. Containerized cargo from main gateway cities can be transported to Honduras in 3-4 days.</p> <p>— Consumers have a strong preference for U.S. products. U.S. products enjoy a high quality image among most Hondurans.</p>	<p>— Labeling requirements differ from U.S. regulations making it more difficult to export a variety of products to Honduras. All products must be labeled in Spanish and expiration dates are required.</p> <p>— The overall size of the Honduran market is small. This restricts direct imports mostly to local distributors that can handle consolidated cargo and store food for prolonged periods of time. The small market size also limits the willingness of foreign suppliers to provide support for new product lines.</p>

<i>Advantages</i>	<i>Challenges</i>
<ul style="list-style-type: none"> — <i>Rapidly developing retail sector and HRI sector. There is a strong presence of U.S. fast food outlets and casual dining restaurants which help promote U.S. foods. The introduction of new U.S. hotel chains is also helping in this regard.</i> — <i>Increased availability of specialized equipment such as walk-in coolers and deep freezers have permitted year-round availability of U.S. produced fruit, such as apples, pears & grapes.</i> — <i>Direct imports by small warehouse outlets have diversified food imports. The biggest winners: U.S. food products and pet specialties.</i> 	<ul style="list-style-type: none"> — <i>Relatively high duties on some products, inconsistent customs valuation practices, and the government's inability to adequately police its borders, encourages contraband imports. This creates an uneven playing field for many distributors, wholesalers and retailers.</i> — <i>Unclear and occasionally restrictive sanitary and phytosanitary import requirements make for uncertain and often difficult import process.</i>

SECTION II. EXPORTER BUSINESS TIPS

The principal agent relationship in Honduras is governed by the civil and commercial codes; Supreme Decree 549, Official Register (La Gaceta) No. 22366, of December 7, 1977. This law is entitled "Law of Agents, Distributors and Representatives of National and Foreign Enterprises," and includes a provision for penalties for wrongful termination that discourages exclusive distribution agreements. Principals may not terminate the contract without just cause, unless they fairly compensate the agent for damages suffered. Only Honduran nationals or Honduran legal entities registered with a local Chamber of Commerce and the Ministry of Industry & 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.

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 consummate a business relationship, the investment in time can pay off in long-lasting and mutually profitable alliances.

When selling in Honduras, U.S. exporters must take into account that for marketing purposes the country is divided into two regions; 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. Large importers and distributors in Honduras usually have offices in both cities to take advantage of market opportunities. In other instances, large international firms have granted exclusive distributor rights, i.e., one exclusive distributor in San Pedro Sula and another in Tegucigalpa. These types of arrangements are acceptable under current Honduran laws.

U.S. exporters should keep in mind the relatively small 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 business people buy directly from abroad if they feel that the cost of imports available in the local market is too high. U.S. exporters should carefully analyze both the cost approach and the market approach when making pricing decisions.

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 a 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.

The 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, reputable 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.

To be protected under Honduran law, trademarks must be registered with the Ministry of Industry and Commerce. 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 party. Illegal registration of a notorious mark, however, must be contested in court if the original holder is to exercise the rights.

U.S. suppliers should also be aware that enforcement of existing food safety laws and regulations has generally been lax in the past, the situation is changing. The Consumer Protection Directorates of the Ministry of Industry and Commerce, and The Consumer Protection Agency of

the Attorney General's Office, are raising consumer awareness about food safety issues which puts more pressure on the Ministry of Public Health and on the Ministry of Agriculture & Livestock to enforce existing legislation. At present, all labels are required to be in Spanish and to display an expiration date. Closed dating is not allowed. Disputes between importers/retailers and government authorities over this matter are on the rise.

Although the import process is fairly transparent 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 and in compliance with all import requirements. This may entail providing Honduran importers with certificates of origin, certificates of free sale, certificates of wholesomeness, phyto and zoosanitary certificates, and other export documentation as required. More in-depth information on labeling and other import requirements can be found in this office's FAIRS report at www.fas.usda.gov/scripts/attacherep/defaults.asp.

SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

UN trade data shows total imports of consumer-oriented products and edible fishery products in 1999 were \$244 million and \$14 million respectively.

- The retail sector is responsible for about 80% of that with about \$206.4 million
- Restaurants account for 12% of the total with \$31 million. But 85% of fishery products
- Food processing accounts for 8% of the total with \$20.6 million

A. Retail Sector

Honduras' retail food sector can be described as varied. Urban consumers shop at large open markets, American-style supermarkets, specialty stores, convenience stores, and local 'mom & pop' stores (known locally as 'pulperías'). Supermarkets account for approximately 40% of food sales, 25% of beverage sales and 70% of confectionery sales. Retail sales of imported consumer-oriented products are conducted mostly by supermarkets, even though smaller stores also sell imported products. In most cases, it is the large and modern supermarkets which cater to the consumer-oriented product demands of higher income groups. The supermarket retailing industry is growing rapidly. Virtually all the supermarket chains are expanding, remodeling, and modernizing. Larger chains in neighboring countries have also formed strategic alliances with chains in Honduras or are opening up stores of their own. Local wholesale outlets and warehouse clubs have been increasing in popularity lately. Price Smart, a U.S.-BASED warehouse club, opened a store in San Pedro Sula in 1999 and another in Tegucigalpa this year.

Christmas gift baskets are also becoming 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, besides being a religious holiday, could also be defined as summer vacation time for the vast majority of Hondurans. This

vacation period begins well before and extends well beyond the two-day holiday. Other than the Christmas season, Easter is the main peak for retail sales. Substantial opportunities exist for U.S. suppliers willing to promote their products during this time and gear their promotional campaigns toward this end. U.S. suppliers should not expect to do much e-commerce with their Honduran customers for the time being. The vast majority of the estimated 40,000 Internet subscribers use the Internet as an information tool and not as an avenue for conducting business. Difficulties in product delivery across borders, and Honduran businessmen's preference for traditional business communication play a large role in this regard.

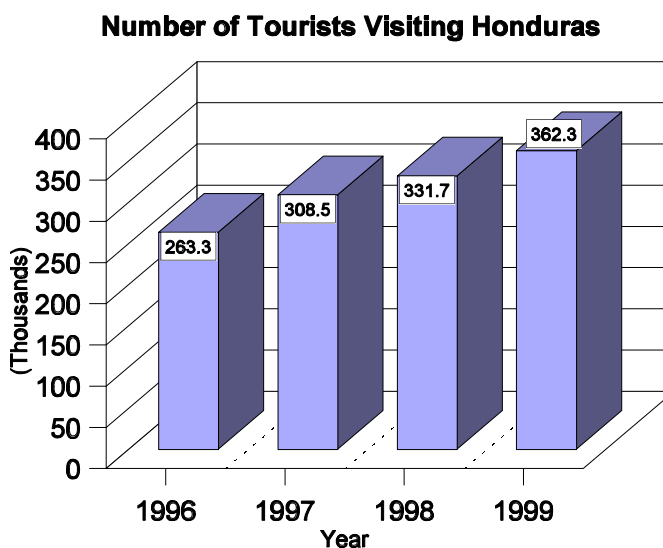
The best marketing entry approach is to appoint a local distributor in Honduras that can provide good market penetration. However, many U.S. suppliers are discouraged by small initial volumes, and do not provide the needed support. U.S. exporters looking to establish and maintain a share of the market, 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 labeling 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.

B. HRI (hotel/restaurant/institutional) Food Service Sector

In Honduras the HRI (hotel/restaurant/institutional) food service sectors are in its infancy. Nonetheless, several distributors are venturing into this sector and a few specialized companies are beginning to focus on this dynamic market. Although development in the tourism industry has been slowed to some extent by

Hurricane Mitch, tourism continues to offer enormous potential and is already exhibiting signs of materializing. The Government of Honduras is trying to capitalize on the country's abundant natural and historical resources by creating legislative incentives which will attract foreign investment in the sector. So far, much of Honduras' tourism sector is concentrated on the Bay Islands and in the Copan Ruins. On Honduras' 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



Source: Honduran Ministry of Tourism

largest hotels. These companies send shrimp to the United States and return with U.S. consumer-oriented products and housewares. On the mainland demand from hotels and restaurants, which has been traditionally sluggish, is beginning to expand exponentially. In 1999, there were 55 new hotel/tourism projects either planned or underway, including several U.S.-Owned hotel projects. Many of these projects are expected to be completed during the year 2000. The restaurant business is also getting a big boost from the introduction of U.S. casual dining establishments such as TGI Fridays, Applebees and Ruby Tuesdays, and the continued expansion of U.S. fast food chains and mall eateries. Large U.S. food service suppliers such as SYSCO and others have recently 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.

C. 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 wheat 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. One local group is investing heavily to become one of the region's top suppliers of snacks, several processed food products, and soaps. However, for many others remaining competitive in the global marketplace is proving to be an uphill battle. 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.

SECTION IV. BEST HIGH-VALUE PRODUCT PROSPECTS

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	Imports from the U.S.	U.S. Market Share	Projected Growth Rate
Beef	\$9,131,000	\$4,112,000	45%	18%
Cheese	\$1,911,000	\$1,228,000	65%	7%
Cotton	\$1,037,000	\$1,020,000	99%	20%
Forest Products	\$29,748,000	\$23,426,000	79%	12%
Powdered Milk	\$20,720,000	\$8,428,000	41%	5%
Processed Fruits & Veg.	\$14,116,000	\$7,583,000	54%	10%
Poultry	\$6,592,000	\$1,257,000	19%	10%
Pork	\$1,979,000	\$1,325,000	67%	8%
Pulses	\$901,000	\$606,000	68%	12%
Baked Snacks	\$13,172,000	\$2,568,000	20%	7%
Soy Meal	\$21,693,000	\$18,895,000	88%	10%
Soy Oil	\$1,404,000	\$1,104,000	79%	5%

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

Institution: Office of Agricultural Affairs American Embassy
 Address: Avenida La Paz,
 Tegucigalpa, Honduras
 Tel: (504) 238-5114
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APPENDIX I. STATISTICS

Table A. Key Trade & Demographic Information (1999)

Product Imports	From all Countries	From the U.S.	U.S. Share
Total Agricultural	\$479.6 Million	\$215.3 Million	44.9%
Consumer-Oriented	\$236.5 Million	\$53.2 Million	22.5%
Edible Fishery	\$12.8 Million	\$3.3 Million	26%

	In Millions	Growth Rate
Total Population	5.9	2.8%
Urban Population	2.6	3.0%
Size of Middle Class ^{/1}	0.7	2.6%

Number of Metropolitan Cities ^{/2}	2
Gross Domestic Product (Billions of US\$) ^{/3}	\$14.13
Per Capita Domestic Products ^{/4}	\$791
Unemployment Rate ^{/5}	12%
Female Population Employed ^{/6}	39.1
Exchange Rate (US\$1=Lempiras) ^{/7}	L15.12

1/- Number of people living in households with monthly incomes between L5,000 and L10,000 (US\$ 340 to 681). Actual size of the middle class may near 1 million if the definition is expanded to include households with monthly incomes of up to L15,000 (US\$ 1,020) and given the high rate of people (8%) not responding to government surveys.

2/- Populations in excess of 350,000

3/- Estimate

4/- Estimate

5/- Estimate. Open unemployment is low; however, underemployment approaches 27%

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

7/- To August 10, 2000

TABLE B. Consumer Food & Edible Fishery Product Imports

Honduras Imports

	Import from the world s			Imports from the U.S.			U.S. Market Share		
	Millions U.S.\$			Millions U.S.\$			Percent		
	1997	1998	1999	1997	1998	1999	1997	1998	1999
CONSUMER-ORIENTED TOTAL	185	217	237	83	95	100	45	44	42
Snack Foods (Excl. nuts)	12	14	15	2	3	3	20	19	20
Breakfast Cereals & Pancake Mix	14	17	19	2	2	2	11	10	11
Red Meats, Fresh/Chilled/Frozen	2	3	5	1	2	3	36	60	60
Red Meats, Prepared/Preserved	3	6	9	1	3	4	45	42	44
Poultry Meat	5	5	4	1	1	2	15	23	50
Dairy Prod (Excl. Cheese)	30	38	40	13	15	11	41	40	29
Cheese	1	3	4	1	2	2	80	57	50
Eggs & Products	8	10	7	1	1	1	7	12	14
Fresh Fruit	5	6	6	5	4	4	88	73	67
Fresh Vegetables	3	4	3	1	1	1	33	29	33
Processed Fruit & Vegetables	14	14	17	6	9	8	42	65	53
Fruit & Vegetable Juices	6	6	8	5	3	2	79	49	25
Tree Nuts	1	1	0	1	1	0	92	82	0
Wine & Beer	2	2	4	1	1	3	74	63	75
Nursery Products & Cut Flowers	1	1	2	1	1	0	32	6	13
Pet Foods (Dog & Cat Food)	1	1	1	1	1	1	47	63	100
Other Consumer Products	79	88	101	44	48	54	56	55	53
FISH & SEAFOOD PROD.	7	13	14	2	3	6	28	25	43
Salmon	1	1	0	1	1	0	100	100	94
Surimi	1	1	0	1	1	0	95	77	100
Crustaceans	4	9	9	1	2	4	19	25	44
Ground Fish & Flatfish	1	1	0	1	1	0	98	86	18
Molluscs	1	1	0	1	1	0	47	20	100
Other Fishery Products	3	3	5	1	1	2	38	26	40
AGRICULTURAL TOTAL	435	404	423	259	215	183	60	53	43
AG, FISH & FORESTRY TOTAL	485	430	439	298	225	194	61	52	44

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

TABLE C. Top 15 Suppliers of Consumer Foods & Edible Fishery Product

Honduras Imports

CONSUMER-ORIENTED AG (\$1,000)

	1997	1998	1999
United States	82,687	95,166	100,016
Guatemala	28,269	36,019	38,006
El Salvador	28,993	33,776	37,328
Mexico	10,406	12,482	20,230
Costa Rica	7,310	8,404	7,933
New Zealand	6,929	6,341	7,881
Netherlands	1,419	5,491	7,050
Chile	2,995	2,039	5,967
Canada	1,015	2,252	3,892
Nicaragua	5,899	3,583	3,218
Panama	699	2,438	1,497
Ireland	3,796	2	1,237
Australia	0	930	633
Spain	337	774	443
U.K.	218	1,155	220
Other	4,006	4,474	8,347
World	184,973	217,394	243,898

FISH & SEAFOOD PRODUCTS (\$1,000)

	1997	1998	1999
United States	2,034	3,264	6,339
Panama	878	2,845	3,570
Costa Rica	847	1,106	1,533
Colombia	393	1,023	535
Thailand	258	261	312
El Salvador	1,543	1,034	251
Hong Kong	1	221	234
Taiwan (Est.)	0	178	207
Ecuador	0	28	139
Morocco	0	14	99
Mexico	312	409	90
Norway	0	0	83
Japan	0	0	47
Nicaragua	6	1,388	34
Guatemala	1	82	18
Other	409	41	7
World	7,295	12,819	13,502

Source: United Nations Statistics Division

Note: The UN statistics in the above tables may not coincide with U.S. export data from the U.S. Bureau of the Census.