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Report Name: Grain and Feed Annual

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Report Highlights:

Rice production in Guatemala is slowly declining due to limited access to improved seed varieties and an insufficient domestic supply of locally developed seeds. As a result, both the cultivated area and overall production are expected to decrease in the coming years.

Additionally, formal rice imports have not increased proportionally to meet growing demand, as contraband trade continues to rise. Meanwhile, white corn production is expanding to supply the domestic market, while yellow corn, primarily used for animal feed, is increasing at least four percent annually to meet the demand for the avian, cattle, and swine domestic production.

Yellow corn now accounts for 52 percent of total corn consumption with the United States as the main supplier for both rice and corn.

RICE

Production:

Both milled and rough rice production in Guatemala is expected to decline by 6.7 percent from marketing year (MY) 2024/25 to MY 2025/26. Despite efforts by the rice sector to promote domestic production, access to quality rice seeds continues to be a challenge, contributing to a reduction in output. As a result, the planted area for rice is anticipated to decrease by 12.5 percent, from 8,000 hectares in MY 2024/25 to 7,000 hectares in MY 2025/26. This decline, coupled with lower yields, is expected to reduce national milled rice production to 14,000 metric tons (MT) in MY 2025/26.

The estimated planted area for rice in Guatemala in MY 2024/25 has been revised downward to 8,000 hectares (Ha), with an expected output of 15,000 MT of milled rice. In MY 2023/24, roughly 9,000 hectares were harvested, yielding 16,000 MT of milled rice. Guatemala's rice production is largely dependent on rainfall, and the prolonged drought over the past two years has severely impacted the sector. However, production is expected to continue in the departments of Petén, Alta Verapaz, and Izabal, where tropical forests help sustain natural rainfall, supplemented by irrigation on commercial farms, as detailed in Table 1.

Table 1
MY (Oct-Sep) 2024/25 Rice producing departments in Guatemala

Departament	Area		Rough Rice Production (e) Metric Tons (MT)
	Ha	%	
Petén	3,340	35.81	8,279
Alta Verapaz	2,204	23.64	5,464
Izabal	997	10.69	2,471
San Marcos	766	8.22	1,900
Jutiapa	557	5.97	1,381
Chiquimula	396	4.24	981
Quetzaltenango	312	3.35	774
Huehuetenango	223	2.39	552
Quiché	196	2.10	486
Escuintla	181	1.95	450
Santa Rosa	126	1.35	312
Suchitepéquez	19	0.20	46
Retalhuleu	9	0.09	22
Total general	9,326	100	23,118

Source: FAS/USDA Guatemala, adjusted from MAGA 2025 cover crop map

For the past 15 years, rice farmers in Guatemala have been reusing seeds for 3 to 5 production cycles, leading to a steady decline in yields. Current projections estimate yields at just 2.86 metric tons per hectare, at least half the average reported by other Central American countries.

The National Institute for Science and Technology (ICTA) of the Ministry of Agriculture (MAGA) developed the ICTA Robusta variety, which closely resembles the milling quality of rice in Costa Rica. However, due to insufficient public funding, seed production was not feasible in MY 2023/24. Recently, the Rice Producers Association (ARROZGUA) succeeded in urging the Ministry of Agriculture to reinstate Guatemala's membership payments to the Irrigated Latin American Rice Fund (FLAR). This move is expected to provide access to improved seed varieties starting in 2026, although a significant decline in domestic rice production is anticipated in the interim. As a result, farmers are shifting to other crops in former rice-growing areas. In eastern Guatemala, rice is being replaced with onions, peppers, tomatoes, and jalapeño chili peppers. In the south, farmers are integrating rice with plantain and banana plantations, while in Polochic, Alta Verapaz, palm oil cultivation is emerging as a more viable alternative.

Consumption and Residual:

Rice consumption in Guatemala is expected to rise slightly by 2.9 percent between MY 2024/25 and MY 2025/26, with projections reaching 139,000 MT in MY 2025/26, equivalent to 7.6 kg per capita. Over the past two decades, rice consumption has grown steadily, largely due to the framework established by CAFTA-DR, which ensured a stable supply of both domestic and imported rice for milling. Additionally, joint marketing efforts between the United States rice associations and Guatemalan rice producers have promoted increased rice consumption across the country. Today, rice is an integral part of Guatemalan cuisine, with only small residual quantities being used in the animal feed industry.

The average milling rate in Guatemala remains steady at 70 percent. The country is home to five industrial rice mills, with the largest facilities situated in Guatemala City. These mills have a combined storage capacity of up to 18,000 MT and are capable of milling 70 MT of rice per day, with a packing rate of 35 MT per day.

Trade:

Rice imports are expected to increase by 4.2 percent from MY2024/25 to MY2025/26. MY 2023/24 marked a record high for U.S. rice exports to Guatemala, with volume increasing by 32 percent from MY2022/23 and value surging by 78 percent to \$61.4 million. The United States strengthened its position as Guatemala's leading rice supplier, expanding its market share to nearly 70 percent, up from 49 percent in MY2022/23, when Brazil and Paraguay were also key suppliers (see Table 2).

Although Latin American consumers generally prefer long-grain rice that remains loose and non-sticky when cooked, price remains a decisive factor in the Guatemalan market. In MY2023/24, 80 percent of Guatemala's rice imports arrived as paddy or rough rice, followed by 9 percent as broken rice, with the remainder imported as semi-milled or milled rice. The United States is expected to maintain at least an 80 percent share of the Guatemalan rice market.

Table 2

Guatemalan Rice Imports in Milled Rice Equivalent (MRE) metric tons (MT)
in MY2022/23 and MY2023/24

Milled Rice Equivalent (MRE) Metric Tons	MY 2022/23 (Oct-Sep)	MY2023/24 (Oct-Sep)
United States	55,824	73,698
Brazil	34,661	24,166
Costa Rica	5,925	7,175
Honduras	555	3,396
Taiwan	-	2,330
Nicaragua	1,098	1,530
Paraguay	17,866	1,378
El Salvador	1,100	1,338
Uruguay	-	652
Thailand	563	590
Vietnam	22	167
China	20	97
India	8	53
Subtotal	117,642	116,570
Others	148	9
TOTAL	117,790	116,579

Source: FAS Guatemala with Trade Data Monitoring Information, 2025

Although most bulk rice imports enter Guatemala through Puerto Quetzal in the south, which has a storage capacity of 12,500 MT, the Mennonites (key commercial grain producers and processors in Guatemala and Belize) have expanded storage capacity by an additional 15,000 MT at Santo Tomás Port on the Atlantic coast. Importers are managing inventories of up to five months due to limited port capacity. However, ongoing delays at ports are affecting both bulk and containerized cargo, disrupting grain imports across the board. In calendar year (CY) 2024, demurrage costs for bulk shipments in Guatemala are estimated at \$20 per MT, with rice being no exception.

Contraband rice continues to undermine domestic production. Smuggled rice from neighboring countries enters Guatemala through land borders, often disguised as "broken rice 80/20," meaning 80 percent broken rice and 20 percent whole grain. Traders exploit this classification by

layering broken rice on top of whole rice to pay lower import taxes. This practice is particularly prevalent at border crossings where lower production costs in Mexico or (value added tax) VAT-free imports in El Salvador create price advantages. While legally milled rice in Guatemala sells for \$44.87 per 100-pound bag, contraband rice is priced significantly lower at \$28.21 per 100-pound bag. Additionally, rough rice is often imported, milled in a third country, and then transported by truck for sale within the Central American region.

Stocks:

Guatemala does not maintain rice stocks, either publicly or privately. Temporary storage is used primarily to manage supply disruptions caused by port constraints, but in most cases, imported rice is sent directly to the mills for processing.

Policy:

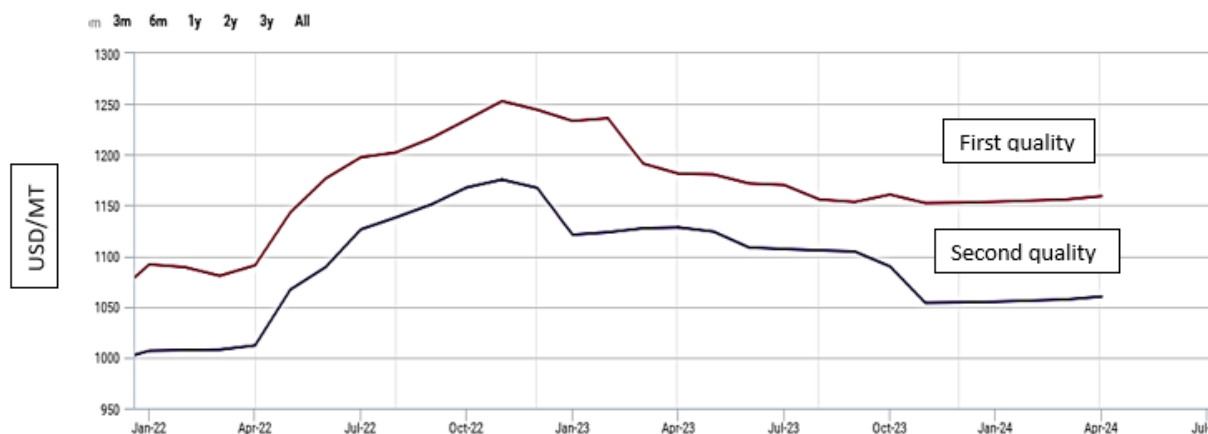
Guatemala has fully complied with CAFTA-DR, effectively managing tariff rate quotas (TRQs) for rice from 2005 to 2023. The Ministry of Economy ensured that tariff updates and reductions were accurately reflected in the Customs Authority (SAT) database each December. As of CY 2023, rice is no longer subject to tariffs. Additionally, the Ministry of Economy has set the World Trade Organization (WTO) quota for CY 2025 at 40,000 metric tons, which can be sourced from any third country. Guatemala has no tariff-rate quotas for rice with any trading partner, and the only applicable tax is the 12 percent VAT, which is applied as a general tax to the cost, insurance and freight (CIF) value of all imported goods.

Marketing:

Rice in Guatemala continues to be distributed through traditional channels, with 84 percent of sales occurring through the country's 50,000 municipal stores, while the remaining 16 percent is sold through 700 retail outlets, primarily supermarkets. As Guatemala's urban population grows and mobility remains limited in major cities like Guatemala City and Quetzaltenango, the opening of new supermarkets and convenience stores is on the rise.

Figure 1 illustrates the historical wholesale prices for milled rice in Guatemala, which have generally ranged from \$1,050 to \$1,150 per MT, with a \$100 per MT price difference between first and second-quality rice. Farm gate prices for MY2024 were reported at \$429 per MT. Retail margins account for nearly 30 percent of the final price paid by consumers.

Figure 1
Historical wholesale prices for rice in Guatemala



Source: MAGA, 2025

Production, Supply, and Demand

Rice, Milled Market Year Begins Guatemala	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	5	9	5	8	0	7
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Milled Production (1000 MT)	18	16	18	15	0	14
Rough Production (1000 MT)	26	23	26	21	0	20
Milling Rate (.9999) (1000 MT)	7000	7000	7000	7000	0	7000
MY Imports (1000 MT)	129	117	175	120	0	125
TY Imports (1000 MT)	178	138	175	140	0	145
TY Imp. from U.S. (1000 MT)	125	95	0	110	0	120
Total Supply (1000 MT)	147	133	193	135	0	139
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Consumption and Residual (1000 MT)	147	133	193	135	0	139
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	147	133	193	135	0	139
Yield (Rough) (MT/HA)	5.2	2.5556	5.2	2.625	0	2.8571

(1000 HA) ,(1000 MT) ,(MT/HA)

MY = Marketing Year, begins with the month listed at the top of each column

TY = Trade Year, which for Rice, Milled begins in January for all countries. TY 2025/2026 = January 2026 - December 2026

OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

CORN

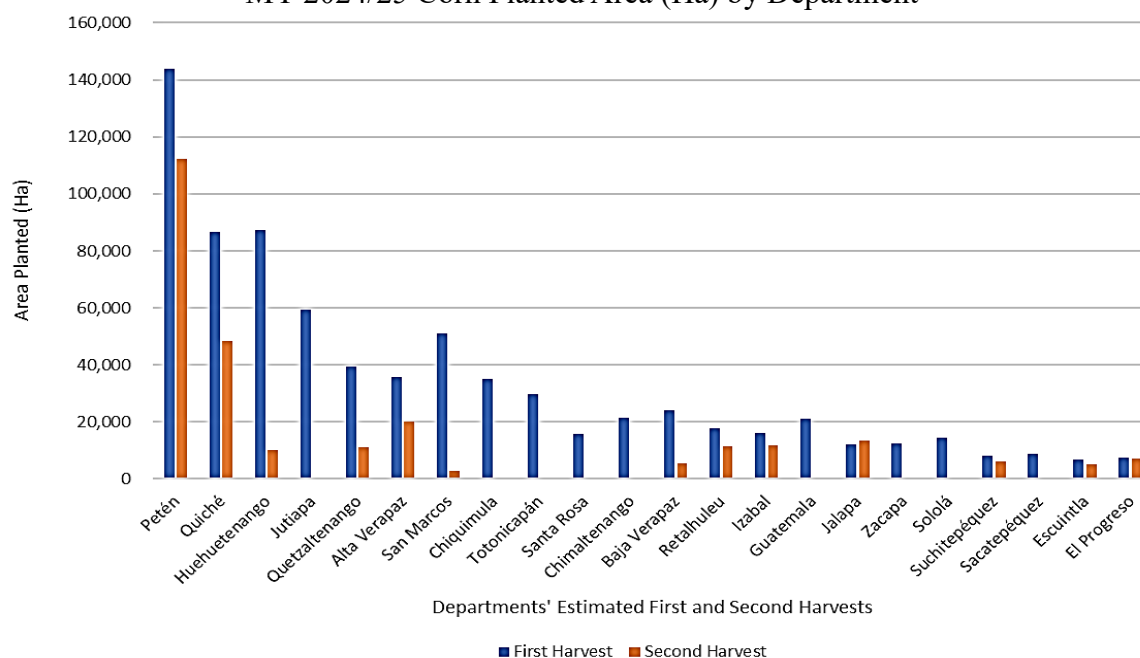
Production:

Guatemala's corn production is expected to see a modest increase of less than 1 percent, rising from 1.625 million MT in MY 2024/25 to 1.626 million MT in MY 2025/26. Similarly, the harvested area for corn is projected to grow slightly from 886,000 hectares to 887,000 hectares during the same period. In MY 2023/24, production reached 1.624 million MT from 885,000 hectares. Guatemala's corn production remains stable but is growing at a slower pace as urban consumers shift toward greater bread consumption. By CY 2025, the urban population will account for 52 percent of the total. The country is nearly self-sufficient in white corn production, with domestic output meeting 93 percent of total demand.

White corn farmers in Guatemala typically plant an additional 10 percent of land each year, with expectations to harvest nearly 90 percent of the planted area. However, weather conditions continue to impact production, with some areas affected by dry spells and others by excessive rainfall. During the MY2023/24 harvest, a 20-day dry spell damaged 16,330 hectares of local corn varieties, particularly in Izabal, near the Atlantic coast, where 3,327 hectares were affected in four departments of the country. The rainy season began with the Alberto tropical system, which caused damage to 460 hectares across 10 departments, with Alta Verapaz suffering most of the damage. In June 2024, heavy rains impacted an additional 6,939 hectares across 73 municipalities, and Izabal faced more rainfall in July, resulting in damage to 5,691 hectares, along with another 3,953 hectares affected in Alta Verapaz.

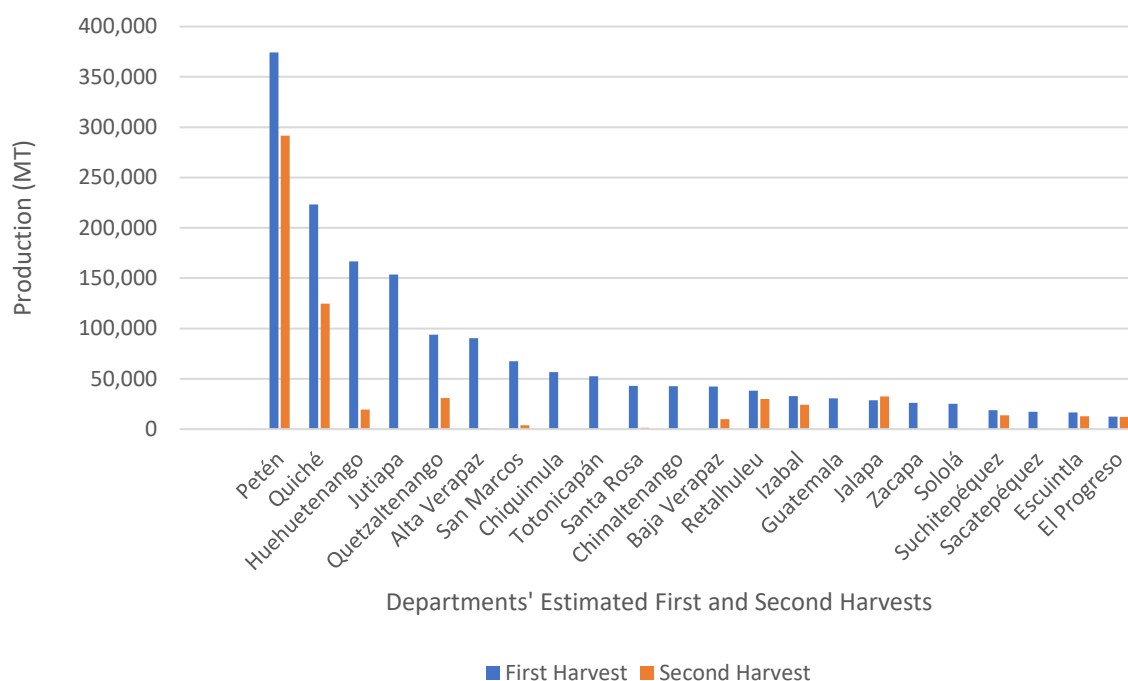
Figure 2 illustrates the estimated planted area for corn in MY2024/2025, while Figure 3 provides the estimated corn production for the same year, highlighting the distinction between the first and second harvests in each producing department. Petén stands as the largest producer of corn in the country, followed by Quiché, Huehuetenango, and Jutiapa. Not all departments experience two harvests annually. Those that primarily cultivate domestic varieties, especially in the highlands, require nine to ten months for their harvest. In contrast, many departments with two harvests per year cultivate both local varieties for domestic consumption and commercial varieties using improved and hybrid seeds.

Figure 2
MY 2024/25 Corn Planted Area (Ha) by Department



Source: FAS Guatemala with MAGA's 2025 Land Use Map Information

Figure 3
MY 2024/25 Corn Production by Department

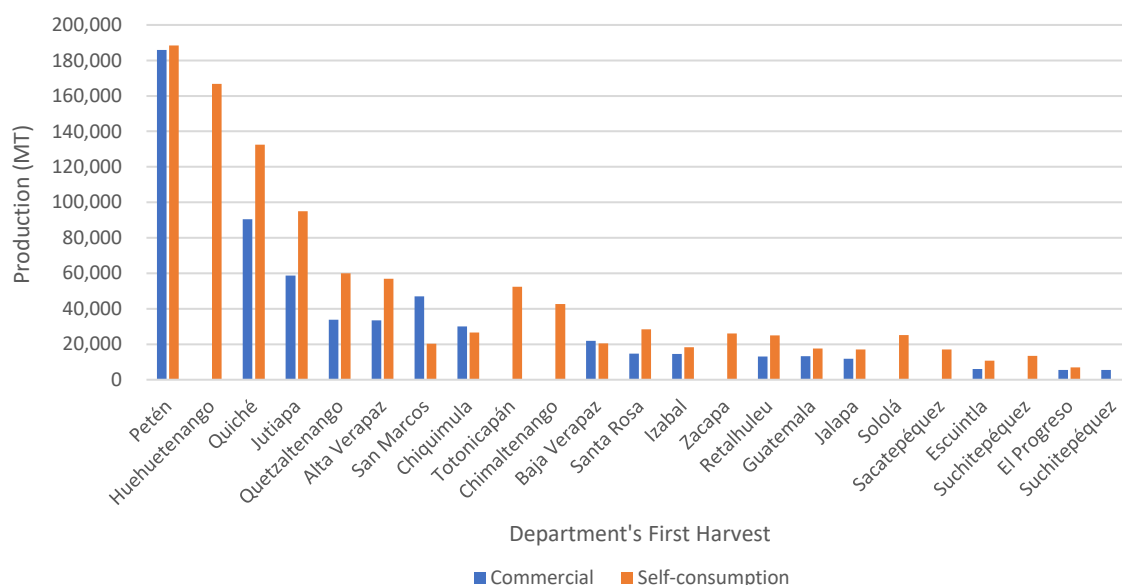


Source: FAS Guatemala with MAGA's 2025 Land Use Map Information

Commercial corn production accounts for approximately 37 percent of the national harvest, while 63 percent is grown for self-consumption. Figures 4 and 5 illustrate the estimated production for MY 2024/25 across different departments, comparing commercial versus self-consumption yields for first and second harvests. Although San Marcos is the department where commercial production exceeds self-consumption, Petén, known as the country's grain basket, produces a near-equal split of commercial and self-consumption corn.

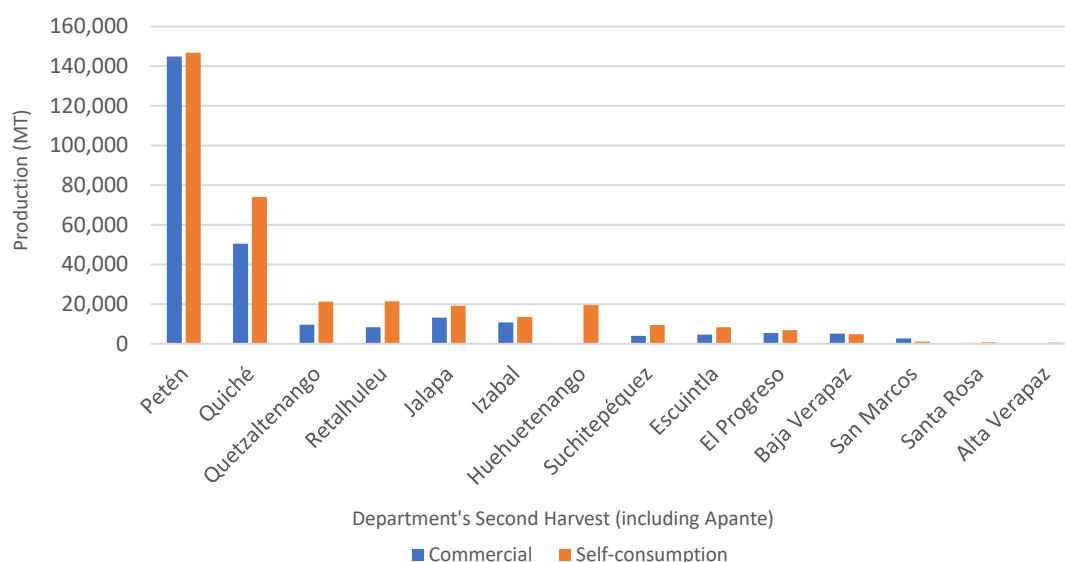
The average yields for commercial corn are significantly higher than those for self-consumption. In the first harvest, commercial yields average 5 metric tons per hectare, and in the second harvest, they rise to 6 metric tons per hectare, three times the yields for self-consumption corn, which range between 1.6 and 2.0 MT per hectare, with an average of 1.8 MT per hectare. As a result, producing corn for self-consumption requires approximately three times more land area than commercial production.

Figure 4
MY 2024/25 Corn Production Estimate by Department-First Harvest
(commercial production vs self-consumption)



Source: FAS Guatemala with MAGA's 2025 Land Use Map Information

Figure 5
MY 2024/25 Corn Production Estimate by Department-Second Harvest
(commercial production vs self-consumption)



Source: FAS Guatemala with MAGA's 2025 Land Use Map Information

Consumption:

Guatemala's total corn consumption is forecast to grow 3.1 percent to 3.62 million MT for MY 2025/26, with 1.65 million MT for food, seed, and industrial (FSI) use, and 1.97 MT tons for animal feed and residuals. Estimated growth between MY 2023/24 and MY 2024/25 is 1.9 percent. In CY 2024, animal feed consumption grew by 3.8 percent, with pet food leading the growth at 5.8 percent, followed by dairy cattle feed (5 percent), broiler feed (3.6 percent), layer feed (3.5 percent), swine feed (3.1 percent), and feed for other species (3.3 percent). Feed now represents 52 percent of the country's total corn consumption, primarily made up of yellow corn, soybean meal, soybean oil, and various nutrients. The poultry sector remains the largest consumer, using 3.25 million MT of formulated feed, which includes 943,471 MT for broilers and 593,465 MT for layers. In CY 2024, dairy cattle consumed 312,557 MT of feed, swine consumed 272,284 MT, pet food accounted for 103,732 MT, and feed for other species (such as tilapia, horses, cattle, rabbits, sheep, and goats) totaled 83,815 MT.

While white corn is the dominant variety for domestic consumption, other colorful corn varieties are also part of the diet, especially in urban areas. These varieties, including yellow, orange, red, and black corn, are grown mainly in the highlands but are also available in high-end restaurants in cities. In Guatemala's urban areas, people enjoy a wide variety of tortillas made from these different types of corn.

Trade:

Guatemalan imports of yellow corn are projected to rise at least 3.6 percent from MY 2024/25 to MY 2025/26, while exports are expected to remain unchanged during the same period. As Guatemala's population continues to grow, the country remains fully reliant on yellow corn for animal feed. Over the past five years, yellow corn imports have steadily grown as a result of an 8 percent average annual growth rate of the local feed industry, excluding CY 2020, when growth was negligible but not negative.

In MY 2023/24, Guatemala imported 15 percent more in total corn from the world compared to the previous year, as indicated in Table 2. In MY 2022/23, more soybean meal was used to replace corn in the feed formula, a common practice when corn prices increase. The United States remains the largest supplier of yellow corn to Guatemala, accounting for 54 percent of the market share, followed by Brazil (38 percent), Argentina (6 percent), and South Africa (1 percent). In terms of value, imports grew by 6.2 percent from CY 2023, totaling \$287.8 million.

Table 2
Trade Matrix for Corn Imports into Guatemala

	MY2022/23 (Jun-Jul) (MT)	MY2023/24 (Jun-Jul) (MT)
United States	987,723	989,095
Brazil	570,402	707,848
Argentina	1,101	116,709
South Africa	21,811	21,385
Mexico	14,588	2,763
Honduras	515	2,056
Belize	1,387	946
Others	189	1,473
TOTAL	1,597,716	1,841,329

Source: FAS Guatemala with Trade Data Monitoring Information, 2025

Central America Balanced Feed, LLC (CABAL in Spanish), founded in 2015, successfully centralized the feed supply for part of the avian, cattle, and pet food industries in 2022. The company now boasts a storage capacity of 50,000 MT for corn and soybean meal, with nearly all of it sourced from the United States. In February 2025, the U.S. Soybean Export Council (USSEC) and its members visited CABAL's facilities in Guatemala.

Stocks:

Ending corn stocks in Guatemala are forecasted to decrease by 11 percent from 277,000 MT in MY 2024/25 to 246,000 MT in MY 2025/26. The decrease is attributed to immediate demand for processing caused by excessive port delays and increasing inefficiencies at both Pacific and Atlantic coast ports. The Pacific region, home to the largest grain terminals, faces the most notable delays. These inefficiencies are tied to inadequate infrastructure, which hampers the smooth unloading of grain ships, causing delays for importers. In CY 2024, the feed industry reported demurrage costs and delays amounting to \$45 million. This additional expense, calculated at \$25 per metric ton of corn (versus \$17 per MT of soybean meal), is ultimately passed on to the end consumer.

White corn stocks are typically seasonal, lasting until between March and April each year. During this period, there are often significant shortfalls before the first major harvest, which replenishes the market after the planting season in May, aligning with the onset of rainy season.

Policy:

Guatemala continues to be a trusted partner under CAFTA-DR, swiftly opening its market to yellow corn while carefully managing the establishment of tariff-rate quotas (TRQs) for white corn. For CY 2024, the TRQ for white corn was set at 27,600 MT, with a modest increase to 28,000 MT in CY 2025. In MY 2023/24, the United States exported 84,025 MT of white corn to Guatemala, followed by South Africa (21,811 MT), Honduras (2,056 MT), and Belize (946 MT), bringing the total to 108,848 MT. The majority of this corn serves the food industry in Guatemala, supplemented through additional WTO quota allocations. The WTO quota for white corn in CY 2025 has been set at 750,000 MT. If U.S. corn prices remain competitive, the United States is positioned to maintain or even increase its market share. However, should U.S. prices become less competitive, Guatemala may seek to fulfill its yellow corn needs by turning to Brazil or Argentina, using a WTO quota announced at the beginning of CY 2025 (please refer to WTO and TRQs in Table 3). A 12 percent VAT should be paid on the CIF value as a general measure independent of the origin.

Table 3
CY2025 WTO and TRQs open in Guatemala

Quotas	Commodity	Volume (metric tons)
WTO	Yellow Corn	750,000
	Rough Rice	40,000
Tariff-Rate Quotas (TRQs)		
CAFTA-DR	White Corn	28,000
Belize	Yellow Corn	23,000
Mexico	Yellow Corn	150,000

Source: FAS Guatemala from [Ministry of Economy Quotas](#) List for 2025

The Ministry of Agriculture has rolled out various programs to support white corn production for food security, yet these initiatives have yielded limited results. Notably, the fertilizer program, which has been in place for over two decades, has shown no discernible impact, as confirmed by independent academic studies. Similarly, efforts to distribute improved varieties and hybrid seeds through the Agricultural Science and Technology Institute (ICTA) have struggled, largely due to insufficient funding for public research and development, resulting in minimal measurable outcomes.

Marketing:

Commercial corn production in Guatemala is primarily sold through municipal and departmental wholesale informal markets, which are widely distributed across the country. White corn prices generally follow the trends of international yellow corn prices, but with a positive differential of up to \$50/MT. Figure 6 illustrates the historical informal wholesale prices for both white and yellow corn in Guatemala. As of March 17, 2025, white corn was priced at \$22.61 per 100 pounds in the formal wholesale market, while yellow corn was priced at \$21.97 per 100 pounds.

Figure 6
Historical informal wholesale prices for corn in Guatemala



Source: MAGA, 2025

In retail markets, white corn is predominantly sold as corn flour, which is mainly used by consumers for preparing tortillas, a key component of Guatemalan cuisine. Prominent commercial brands of white corn flour include MASECA (\$31.4 per 50 pounds) and TORTIMASA (\$25.92 per 50 pounds). White corn grains are priced at \$0.23 per pound, while the flour is sold at \$0.63 per pound, three times higher, due to processing and significant transportation costs. Guatemala's transportation infrastructure presents challenges, with an average mobilization speed of only 17 km/h, compounded by a critical lack of investments in the country's communication networks across air, ground, and sea transport.

Production, Supply, and Demand for Corn

Corn Market Year Begins Guatemala	2023/2024		2024/2025		2025/2026	
	Jul 2023		Jul 2024		Jul 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	885	885	886	886	0	887
Beginning Stocks (1000 MT)	260	260	296	268	0	277
Production (1000 MT)	1625	1624	1625	1625	0	1626
MY Imports (1000 MT)	1839	1841	1850	1907	0	1975
TY Imports (1000 MT)	1894	1896	1800	1925	0	1990
TY Imp. from U.S. (1000 MT)	983	980	0	1001	0	1034
Total Supply (1000 MT)	3724	3725	3771	3800	0	3878
MY Exports (1000 MT)	3	3	2	3	0	3
TY Exports (1000 MT)	3	3	1	3	0	3
Feed and Residual (1000 MT)	1775	1804	1800	1868	0	1975
FSI Consumption (1000 MT)	1650	1650	1650	1652	0	1654
Total Consumption (1000 MT)	3425	3454	3450	3520	0	3629
Ending Stocks (1000 MT)	296	268	319	277	0	246
Total Distribution (1000 MT)	3724	3725	3771	3800	0	3878
Yield (MT/HA)	1.8362	1.835	1.8341	1.8341	0	1.8331
(1000 HA) ,(1000 MT) ,(MT/HA)						
MY = Marketing Year, begins with the month listed at the top of each column						
TY = Trade Year, which for Corn begins in October for all countries. TY 2025/2026 = October 2025 - September 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Attachments:

No Attachments