

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Guatemala

Food Service - Hotel Restaurant Institutional

Annual

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Report Highlights:

Guatemala has a population of almost 17 million inhabitants and approximately 5 million live in Guatemala City where most of the new hotels and restaurants are opening in the country. There is a high demand for high-quality, imported consumer-oriented products. Healthy, nutritious, and organic products are in demand as many restaurants and hotels adapt their menus to satisfy this demand.

Post:

Guatemala City

SECTION I. MARKET SUMMARY

Guatemala, the country with the largest population in Central America with around 16 million inhabitants, is a net importer of goods and services (?). It is also the horticultural hub for Central America. The United States is Guatemala's largest trading partner; U.S. exports of consumer-oriented agricultural products to Guatemala were a record \$385.4 million in 2016.

The Central American-Dominican Republic Free Trade Agreement (CAFTA-DR) with the United States was signed 11 years ago and has resulted in increased bilateral trade; as of 2017, most U.S. products enter duty free and all U.S. import tariffs will be eliminated in seven years with the exception of white corn that won't be eliminated.

The Guatemalan Restaurant Council (GREGUA), reports that the restaurant sector has grown 6 to 7 percent over the past three years as many new restaurants open and increased demand for high-quality products such as: beef, pork, poultry, processed foods, apples, grapes, and wine and beer.

Hotel, Restaurant and Institutional (HRI) Sector

The food service industry is one of the most dynamic sectors in the Guatemalan economy generating more than 150,000 direct jobs in the hotel and restaurant industries; and many more indirect jobs in the agricultural and food processing industries.

Due to increased urbanization, especially in Guatemala City and its surrounding area, more Guatemalans are eating lunch outside of the home.. The most popular option is fast food. According to a recent study, 76 out of 100 Guatemalans that eat out prefer to eat at fast food restaurants. Small family owned cafeterias and street food vendors (where grilled hot dogs are widely sold) are additional options for eating out. Fine dining is more common during the weekends or to celebrate special occasions and are frequented mostly by middle and upper-class consumers.

Guatemala is a tourism destination for international travelers; this sector contributes 3.4 percent of the country's \$68.7 billion GDP. The Guatemalan Tourism Institute (INGUAT) reported that 1.9 million tourists visited Guatemala in 2016 and generated an income of more than \$1.7 billion. Most hotels offer breakfast as part of the lodging rate even small hotels in the interior. These hotels acquire their products at open air markets, supermarkets, and/or importers dedicated to the foodservice industry.

Hotels

Approximately 2,700 hotels, motels and bed and breakfasts operate in Guatemala and provide accommodation for both the business and tourism sector. Guatemala City is where most sales are generated and where most of the 3 - 5 stars hotels are located. In 2017, four new hotels began operations in Guatemala: Hyatt Centric with an investment of almost \$29 million offering 138 rooms; Marriott International with an investment of \$25 million, which opened two hotels: Courtyard Marriot with 147 rooms; AC Marriott with 114 rooms; and Hotel Latam in the interior of the country, offering 69 rooms.

Antigua Guatemala is the closest tourism destination to Guatemala City and has more than 150 hotels of which 15 are boutique hotels. According to INGUAT, close to 70 percent of all tourists that travel to Guatemala visit Antigua. Vacation rentals in Guatemala also such as Airbnb are becoming more popular for international visitors as well for Guatemalan tourists.

The average rate for a single room in most hotels located in the interior of the country is US\$30 - \$50 per night.

Only 15 percent of total hotels in Guatemala have rates higher than US\$100 per night and boutique hotels can

charge well over \$200 a night. Of the 22 departments, Guatemala City, Sololá, and Petén have the largest number of hotels, totaling 51,053 rooms for lodging.

Guatemala is promoting itself not only as a tourism destination but also as a destination for business, weddings, international art expositions, music concerts, etc.

In 2016, 1.1 million visitors traveled to Guatemala centered around Holy Week festivities (11 percent of total visitors); and Christmas (22 percent).

The largest number of travelers was from El Salvador totaling 848,065 visitors followed by the United States and Canada with 394,913 visitors.

TOURISTS IN GUATEMALA BY NATIONALITY			
PERIOD 2015-2016			
NUMBER OF TOURISTS			
Country	2015	2016	% total
Central America & Belize	1002732	1051455	55
North America	599880	595303	31
Europe	130435	125385	7
South America	78910	81035	4
Rest of the world	53177	53014	3
Total	1,865,134	1,906,192	100

Source: Guatemalan Tourism Institute (INGUAT)

Hotels rely on food service importers to purchase high-end products such as fine wines, meats, gourmet style dips, jellies and sauces, deli meats, dairy products, baking mixes, and seafood. The purchase of fresh produce is regularly done at the farmer markets and supermarkets. Guatemala also has a developed food processing industry that offers a variety of products that service most hotels and restaurants throughout the country.

Restaurants

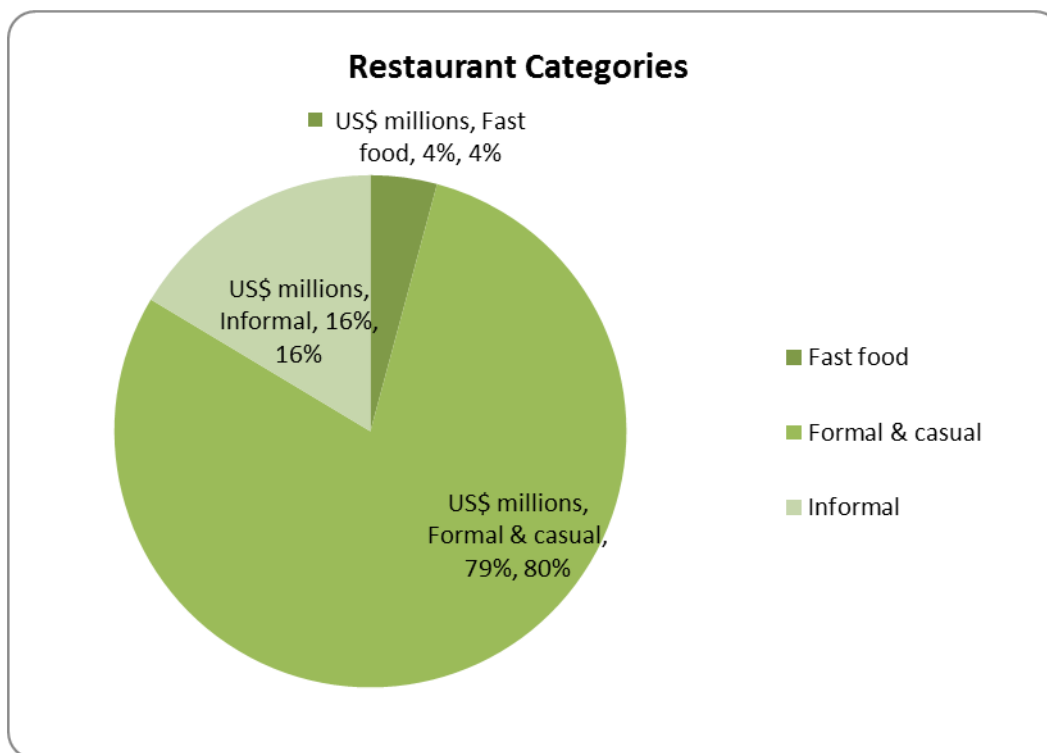
According to GREGUA, over the past ten years the number of restaurants increased from 13,605 restaurants in 2013 to 22,000 in 2015. Fast food restaurants have grown in sales by offering home delivery services. Fast food restaurants are also an option for business people.

A study carried out by Millward Brow, an American research organization, estimated that 76 out of 100 Guatemalans prefer to eat at fast food restaurants rather than formal dining restaurants. The preference for fast food restaurants is due to pricing, proximity to work and residential areas, and kids' entertainment areas. Consumer preferences are divided as follows: 19 percent prefer casual restaurants, 7 percent gourmet restaurants and the rest are divided among food stalls (27 percent), food carts (17 percent), sales on the street (12 percent) and other options (17 percent). The most popular types of fast food in Guatemala are hamburgers, pizza, tacos, and fried chicken.

There are more than 20 U.S. franchises in Guatemala and new ones are opening each year. Restaurants also buy

products directly from foodservice suppliers, local food processing companies, importers, supermarkets, and farmers markets. Guatemala has around 14,600 restaurants from which 79.4 percent are formal restaurants; 4.2 percent are fast food restaurants and 16.4 are informal restaurants. The majority of restaurants, 52 percent, serve Guatemalan traditional food, 30 percent are Chinese, 6 percent are American, 9 percent are international, and 2 percent are Italian . Guatemalan cuisine is diverse but most local dishes include white corn and tomato sauce.

Despite the fact that Guatemala does not have a single national dish, most traditional foods are stews that include meats and vegetables. Seafood is also included in some dishes that are commonly found in the Northeastern part of the country. Guatemala's restaurant sector is divided into three different categories: a) formal full-service restaurants: from high-end with prices from US\$30 to US\$40 per person; to casual restaurants with more affordable prices (US\$8 - US\$25). Some of these casual restaurants are family oriented and many have an area for kid's entertainment; b) fast food restaurants and c) informal restaurants that are family-owned businesses.



The majority of formal and casual restaurants are located in Guatemala City and Antigua Guatemala, a major tourist city 45 minutes from Guatemala City. These restaurants represent a great opportunity for U.S. products because chefs require high quality products that are not locally produced and depend on imports for their menus. The rest of the tourism areas in the interior of the country have more casual and informal restaurants that offer more traditional dishes.

Asociación Guatemalteca de Franquicias –AGF is the local association for franchises in Guatemala and is also a member of the Federación Iberoamericana de Franquicias. As of 2016, Guatemala has around 300 franchises which include approximately 100 local companies. From the existing franchises the main food related franchises are within the following categories: fast food restaurants, ice cream parlors, bakeries and coffee shops. This is a sector that has grown rapidly not only on their sales at their restaurants; and in the case of fast food restaurants, sales increased because of home delivery services. The most popular types of fast food in Guatemala are: hamburgers, pizzas, tacos and fried chicken.

Fast food restaurants are also an option for working people who increasingly must eat breakfast and lunch away from their homes. Informal restaurants are also increasing food sales by serving menus at lower prices during peak hours.

Coffee shops are popular among young people in Guatemala. This is a sector that has found a niche market in Guatemala and in the past ten years more than 100 coffee shops, both local and international, have opened throughout the country. Although Guatemala is a large exporter of coffee to the world, local consumption is still low in comparison to other countries; however, there are still ample opportunities for coffee shops to increase in number. U.S. companies like McDonalds that have separate coffee shops inside their restaurants account for more than 50 coffee shops. Starbucks began operations in Guatemala in 2011 and to date has seven stores and plans to expand in the near future. Coffee shops also offer a wide variety of other food options including sandwiches, hamburgers, bakery goods, and other beverages which open the opportunity for U.S. ingredients, meats, french fries and pastries.

The food service companies that supply the formal and casual restaurants, coffee shops, and fast food restaurants, also distribute products in the interior of the country. Fast food restaurants rarely import directly, so they rely on food service companies to bring the products they need.

The Institutional Market

The following sectors are considered important within the institutional market in Guatemala and depend on the Government of Guatemala (GOG) for acquisition of food products:

- Government social programs
- Public hospitals
- Penitentiary system
- Public schools for their feeding programs (when budgeted and approved.)
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Guatemalan law stipulates that the GOG must use an electronic system called Information System for Contracting and Acquisitions for the Government also known as GUATECOMPRAS for purchases and contracts when goods and contract services are higher than US\$161,000. The main objective of GUATECOMPRAS is to provide 1) transparency for the purchasing or contracting of services and goods; 2) efficiency by reducing costs and number of declines to potential suppliers during the bidding process; 3) protection against monopoly as it is an open process that is accessible to small and medium companies or foreign suppliers.

The GOG requires that foreign suppliers that want to bid for goods or services available through GUATECOMPRAS, must have a local representative that places the bid and that company or person must fulfill all pre-qualification requirements. However, it is important to mention that the GOG gives preference to the goods and services offered by local companies. For more information please refer to the GUATECOMPRAS website www.guatecompras.gob.gt

There are some exceptions when the GOG doesn't require bidding goods or services when those are considered acquisitions of national emergency.

Following are some of the social programs carried out by the GOG:

Bolsa de Alimentos (Food Grant): For the past ten years, the GOG, through the Ministry of Social Development, oversees the food grant program and provides a monthly bag of food products to families that live in poverty or extreme poverty, the elderly, handicapped people and pregnant women that live in the marginal areas of Guatemala

City. The bag contains: 10 pounds of rice, 10 pounds of black beans, 5 pounds of corn flour, 5 pounds of nutritional powdered beverage, 1 pound of powdered milk, and ½ gallon of cooking oil.

Comedores Seguros (Subsidized Cafeterias): These provide nutritional balanced breakfast for a minimum fee of US\$0.15 and lunch for US\$0.40. The program has 14 different cafeterias and half of them are located in the interior of the country. Meals include meat, beans, rice, eggs, vegetables, tortillas or bread and a beverage.

Social and Sport Clubs

In Guatemala there are more than twenty social and sport clubs; most of them are located within Guatemala City. These clubs buy food and beverages from local importers/distributors, open air markets and wholesale markets. Many of the clubs rent their facilities for social activities like weddings, baby showers, etc. and are available not just for their members but also for non-members.

Catering services

Many hotels, high-end and casual restaurants also offer catering services. In addition to the food, they offer services of bar tenders, waiters, decorations, furniture and silverware. Hotels and restaurants are constantly looking for quality products and prefer imported meats, desserts, seafood, beverages, liquors and ingredients. Even though they usually work with their same distributors, they make their purchasing decisions based on competitive prices in order to compete.

Advantages and Challenges of Exporting to Guatemala's HRI Sector

ADVANTAGES	CHALLENGES
The United States is Guatemala's main trading partner and U.S. products are considered of high quality.	Guatemala has several Free Trade Agreements with other countries including one recently signed with the European Union which is a strong competitor of U.S. products.
As Guatemalan consumers become more sophisticated, opportunities for higher quality products increase.	Guatemala is a price sensitive market and this could affect loyalty to brands in times of economic difficulty.
Fast food restaurants require specific quality on the ingredients used for their menus; this requires importing more value added products to meet international standards.	The Government of Guatemala (GOG) requires that food imports are accompanied by a Certificate of Origin to grant preferential access. However, errors, mistakes, or omissions of any kind on the certificate could result in the denial of preferential access for U.S. imports of food products.
The increase in the tourism creates an opportunity to increase sales.	The tourism sector in Guatemala is large but high crime is a concern for visitors and the local authorities have much to do to improve security.
Business people eat out at least two meals a day due to long working hours and traffic.	Business people eat at informal restaurants more than formal or fast-food restaurants where more U.S. ingredients are used for the preparation of menus.
Changes in weather conditions are causing local crop losses and this creates an opportunity for U.S. products to satisfy demand.	There is limited infrastructure, and maintaining the cold chain for perishable products is a challenge when transporting products to different regions of the country.
Health concerns are opening the market for healthy and organic products.	Lack of knowledge about organic products limits consumption of these products to a niche market.
The growing food processing industry is looking for new and better food	Nearby countries such as El Salvador and Mexico can supply the local demand of raw materials for the processing industry.

ingredients for bakery, deli meats, beverages and snacks.	
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SECTION II: ROAD MAP FOR MARKET ENTRY

A. MARKET ENTRY STRATEGY

Guatemala represents a growing market for U.S. companies that offers relative stability, has a strategic geographic access to the region on both the Atlantic and Pacific Oceans and is also very close to the United States. With the exception of fast food restaurants, most hotels and restaurants buy products from different distribution channels. Since Guatemala is a vegetable and fruit grower and exporter, the HRI sector prefers to buy local products but there are some products such as grapes, apples, pears, cherries, Chinese vegetables, condiments and herbs that are not grown in Guatemala and need to be imported from other countries. The HRI sector relies on imported products to satisfy the demand especially for those restaurants that specialize in international cuisine.

A few examples of these products are: fine meat cuts, liquors, wines, specialty products, seafood, french fries, etc. The key to success in entering the Guatemalan market is to try to match local prices with higher quality U.S. products because this is a price-conscious market. U.S. products are well known for their quality and safety.

U.S. food exporters that want to enter the Guatemalan market may contact directly the local food importers/agents/distributors depending on the type of product. Most of the foodservice importers supply hotels and restaurants in Guatemala City and the interior of the country. Hiring a distributor is sometimes the easiest and fastest way to enter the market, particularly if the distributor is already supplying other imported products throughout the country.

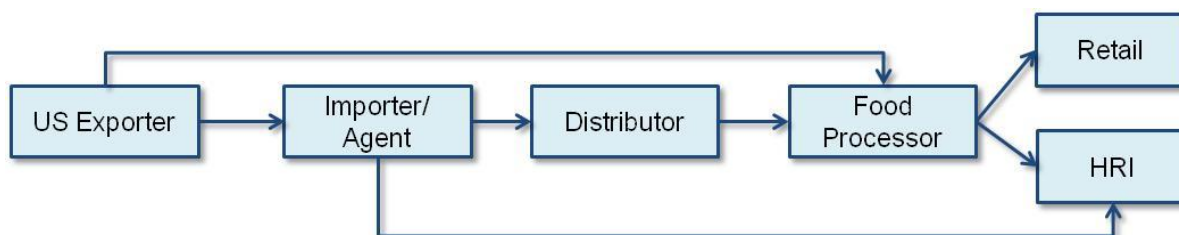
The Foreign Agricultural Service (FAS) office in Guatemala City maintains a list of companies that represent or distribute U.S. products in Guatemala. The office also has ongoing activities that provide opportunities to meet Guatemalan traders.

U.S. suppliers that want to enter the country must comply with local regulations for imported products to avoid problems when importing. For further information on these regulations, please refer to FAIRS Report 2017: www.fas.usda.gov/scripts/attacherep/default.asp

It is recommended that U.S. suppliers meet the local importers and learn more about the Guatemalan market. Trade missions or local trade food shows are also other ways to find importers or distributors. Most of the business people that participate in these types of events are usually looking for new products to supply to the local market.

B. MARKET STRUCTURE

The following is an overview of the distribution channel for imported products to the HRI:



Food processors also play an important part on the imports of U.S. raw materials/ingredients, since they also supply the HRI and many imports these products directly. The local food processing companies usually have their own distribution channels of wholesalers, retailers and the hotel, restaurant and institutional industries. There is a small portion of companies that also have the ability to distribute their products to the interior of the country.

C. COMPANY PROFILES

International Hotel Chains in Guatemala

Name	Number of Hotels	Location
Barceló	1	Guatemala City
Real Intercontinental Hotel	1	Guatemala City
Westin Hotels & Resorts	3	Guatemala City, Antigua Guatemala, and Petén
Holiday Inn	1	Guatemala City
Biltmore Express	1	Guatemala City
Best Western	1	Guatemala City
Radisson	1	Guatemala City
Quinta Real	2	Guatemala City and Antigua
Clarion Suites	1	Guatemala City
Hotel Melia	1	Guatemala City
Ramada International Hotels & Resorts	1	Guatemala City
Howard Johnson	1	Guatemala City
Hilton	1	Guatemala City
Hyatt	1	Guatemala City
AC Marriott	1	Guatemala City
Courtyard by Marriott	1	Guatemala City
Latam	1	Quetzaltenango
Mercure	1	Guatemala City

These international hotels have at least one restaurant and some have two. International travelers that stay in Guatemala City for business purposes usually stay from two to four nights.

Most of the international hotels include the breakfast in their lodging rates and therefore, most travelers eat breakfast at the hotel and have lunch and dinner in nearby restaurants. The other tourists that travel to Guatemala on vacations go directly to the interior of the country and stay in smaller 1 - 2 star hotels. There are a few exceptions like Antigua Guatemala, Atitlan, and Peten where there are 3 - 5 star hotels and according to INGUAT,

these travelers stay at least 7 nights and spend up to US\$104 per day. The hotels in Guatemala City and other places, purchase products through wholesalers, retailers, and informal markets; for imported food products they buy through local distributors.

The following are the U.S. food franchises operating in Guatemala:

U.S. Franchises	Type
Taco Bell	Fast-food
McDonalds	Fast-food
Burger King	Fast-food
Wendys	Fast-food
Chili's	Formal restaurant
Friday's	Formal restaurant
Domino's	Fast-food
Pizza Hut	Fast-food
Little Caesars	Fast-food
Chuckee Cheese	Formal restaurant
Applebees	Formal restaurant
Dunking Donuts	Fast-food
IHOP	Formal restaurant
Subway	Fast-food
Starbucks	Coffee shop
Cinnabon	Fast-food
Tony Roma's	Formal restaurant
Hooters	Formal restaurant
Panda Express	Fast-food
Kentucky Fried Chicken	Fast-food
Papa Johns	Fast-food
Hard Rock Café	Formal restaurant
PF Chang	Formal restaurant
Wing Zone	Fast-food
Krispy Kreme	Fast-food

Franchises need raw materials and ingredients for the preparation of menus, some use local products but some import products to comply with international quality standards and comply with the commitments stipulated in the franchise agreement. These restaurants either request their products from local distributors or import directly.

III. COMPETITION

Guatemala has various free trade agreements with other countries including the European Union. Guatemala is also part of the Central America Customs Union which has provided positive effect on the intra-regional trade within the Central American Countries.

According to Secretariat for Central American Economic Integration (SIECA), Guatemala has 37.5 percent of total intra-regional exports to the rest of the Central American countries. The elimination of customs barriers with Honduras, and eventually El Salvador, is also contributing to the increase of Guatemalan exports to these countries. The major competitors with the United States in consumer-oriented products imports in Guatemala are El Salvador with 18 percent market share, Mexico with 17 percent market share, and Costa Rica with 14 percent market share.

Products that faced competition from other countries in the Guatemalan market in 2016:

Product Category (2016 calendar year)	Major Supply Sources in 2016	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
<p>Fish and Seafood</p> <p>Net imports: 14,588 MT.</p> <p>Valued at: US\$55.1 million</p>	<p>Argentina: 26 percent Ecuador: 24 percent</p> <p>The United States has 14 percent share and is the fifth supplier of fish and seafood products but there are still ample opportunities in this market. CAFTA-DR has 0% duties for imports of fish and seafood products from the U.S.</p>	<p>Argentina and Ecuador have exporting plants approved to export to Guatemala and offer more competitive prices than the United States.</p>	<p>Guatemala is an exporter of fish and seafood products. However, local prices for these products are high and there is no much available year round since most of the production goes to the export market.</p> <p>Guatemala requires new U.S. export plants to be certified by the Guatemalan government.</p>
<p>Dairy products (excl. cheese)</p> <p>Net imports: 81,655 MT.</p> <p>Valued at: US\$118 million</p>	<p>Costa Rica: 32 percent Nicaragua: 18 percent</p> <p>The United States has 5 percent of market share.</p>	<p>Costa Rica and Nicaragua offer competitive prices due to low transportation costs.</p>	<p>Guatemala's domestic production of dairy products is insufficient to supply the demand by the HRI sector.</p>
<p>Wines and sparkling wines</p> <p>Valued at: US\$11.1 million</p>	<p>Chile: 42 percent Spain: 26 percent</p> <p>The United States is the fourth largest exporter of wines to Guatemala with 7 percent market share.</p>	<p>Chile and Spain have very aggressive marketing promotion programs for their brands, including consumer training programs to learn about varieties and qualities of their wines and sampling activities at food shows and supermarkets.</p>	<p>Guatemala does not produce wines and relies only on imported products.</p>

Source: Global Trade Atlas

IV. BEST PRODUCT PROSPECTS

A) Products present in significant quantities but which have good sales potential in the market.

Please refer to the Exporter Guide 2017 at www.fas.usda.gov/scripts/attacherep/default.asp

B) Products not present because they face significant trade barriers.

There are few products that are not present in the Guatemalan market due to trade barriers, but there are some sanitary and phytosanitary issues that sometimes restrict trade. Some restrictions include:

Horticultural imports from Florida and California are still restricted due to the presence of the Pink Hibiscus Mealy bug, but advances have been made with the GOG modifying its requirement that states or growing areas be pest-free to the requirement of individual shipments of agricultural commodities.

Fortification – Guatemala requires that three products be fortified before they are approved for retail sale. Imported flour must be fortified with riboflavin, folic acid, niacin, iron and thiamine. Imported salt must be fortified with iodine and flouride, and imported sugar with vitamin A. The GOG applies these same fortification requirements to domestic products.

Following are some examples of trade barriers affecting U.S. agricultural exports to Guatemala: 1) the denial of preferential treatment for U.S. products under CAFTA-DR due to errors when assigning HS codes in the classification of the products; 2) the denial of preferential access due to errors, mistakes, and omissions on the certificate of origin; 3) required fortification for imported flours, salts, and sugars.

V. POST CONTACT AND FUTHER INFORMATION

If you need assistance exporting to Guatemala, please contact the U.S. Agricultural Affairs Office at the following address:

Office of Agricultural Affairs
Avenida Reforma 7-01, Zona 10
Guatemala, Ciudad 01010
Phone: (502) 2332-4030/2334-8439
Fax: (502) 2331-8293
Email: AgGuatemala@fas.usda.gov

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

VI. LIST OF MAJOR REGULATORY AGENCIES

Name: Ing. Jorge Gómez
Title: Director
Institution: Food Control Unit/Ministry of Health (MSPAS)
Address: 3 Calle final, 2-10 Zona 15. Valles de Vista Hermosa. Guatemala
Telefax: (502) 2369-8784 / 6
Website: <http://portal.mspas.gob.gt/index.php/en/servicios/regulacion-y-control-de-alimentos-menu-servicios.html>
Name: Guillermo Ortiz
Title: Plant Health Director
Institution: Norms and Regulations Unit/Ministry of Agriculture (MAGA)
Address: 7 Avenida 3-67 Zona 13, Guatemala City, Guatemala
Telephone: (502) 2413-7389
Website: http://visar.maga.gob.gt/?page_id=56

Name: Alex Salazar
Title: Food Safety Director
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Telephone: (502) 2413-7389
Website: http://visar.maga.gob.gt/?page_id=58

Name: Byron Thomae
Title: Animal Health Director
Institution: Norms and Regulations Unit/Ministry of Agriculture (MAGA)
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Telephone: (502) 2413-7389
Website: http://visar.maga.gob.gt/?page_id=55

Name: Dra. Nidia Sandoval
Title: Director OIRSA-SEPA-SITC
Institution: Inter-Regional Organism for Plant & Animal Health
Address: 21 Avenida 3-12, Zona 15, Guatemala
Telephone: (502) 2369-5900
Fax: (502) 2334-0646
Website: <http://www.oirsa.org/portal/Default.aspx>

Name: Lic. Alexander Cutz
Title: CAFTA-DR Administrator
Institution: Foreign Commerce Administration Direction/Ministry of Economy
Address: 6 Avenida 10-43 Zona 1, Guatemala
Telephone: (502) 2412-0200
Website: <http://portaldace.mineco.gob.gt/>

The following reports provide more information on exporting U.S. food products into the Guatemalan market:

- Exporter Guide 2017: www.fas.usda.gov/scripts/attacherep/defaults.asp.
- FAIRS Report 2017: www.fas.usda.gov/scripts/attacherep/default.asp
- FAIRS Export Certificate Report 2017: www.fas.usda.gov/scripts/attacherep/default.asp
- U.S. Commercial Service in Guatemala www.buyusa.gov/guatemala