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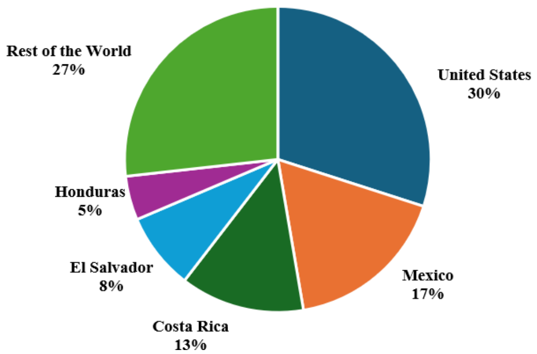
Report Highlights:

Guatemala, Central America’s horticultural hub with nearly 19 million people, is a leading U.S. trading partner in the region, with nearly all U.S. goods entering duty-free under CAFTA-DR. Economic growth is projected at 3.6–4.1 percent in 2026, supported by consumer spending and remittances. The food retail sector reached $11 billion in 2025, although traditional markets and neighborhood stores still account for most food sales. Walmart, Unisuper, and PriceSmart lead the formal retail sector, with opportunities for U.S. exporters in private-label, organic, and premium products, particularly through experienced local distributors that can navigate regulatory requirements and a price-sensitive market.

Executive Summary

Guatemala, with a population of nearly 19 million, serves as the horticultural hub of Central America. The United States is Guatemala's primary trading partner, contributing to 40 percent of Guatemala's trade. As of January 1, 2025, nearly all U.S. consumer and industrial goods, except for white corn, enter duty-free under the CAFTA-DR.

Consumer-Oriented Agricultural Imports



Food Retail Industry

Guatemala's food retail sales reached $11 billion in 2025, an increase of over 33 percent from 2024. Three supermarket chains dominate the retail sector in Guatemala. These supermarkets mainly target middle and high-income consumers. However, there are still many opportunities in the industry. Only 30 percent of food sales are in supermarkets. Other consumers still rely on traditional open-air markets and corner stores.

Food Processing Industry

The processed foods market in Guatemala reached $6.2 billion in 2025 and will grow at a compound annual growth of 8.6 percent to reach $14.1 billion in 2035. U.S. agricultural exports to Guatemala are crucial raw materials in this industry. Moreover, this sector is projected to grow in 2026, indicating a promising opportunity for U.S. companies.

Food Service Industry

The food service industry in Guatemala is expected to maintain a growth trajectory in 2025, continuing an expansion trend that averaged 5.1 percent annually over the previous five-year period. This industry represents approximately 4.5 to 5 percent of the national GDP.

Quick Facts CY 2025

Imports of Consumer-Oriented Ag Products (U.S $million). **$3,658 million**

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

1) Soup & Food prep **(217)**
2) Poultry Meat & Products **(212)**
3) Pork & Products **(148)**
4) Dairy Products **(133)**
5) Bakery goods, cereals, and pasta **(111)**
6) Beef & products **(105)**
7) Condiments & Sauces **(96)**
8) Processed Vegs. **(84)**
9) Fresh Fruits **(51)**
10) Meat Products **(18)**

Food Industry by Channels (U.S. billion)

Retail Food Industry	$11
Food Service-HRI	$5.1
Food Processing	$6.2
Food and Agriculture Exports	$8.1

Top Guatemalan Food Retailers

1) Walmart Mexico & Central America
2) Unisuper
3) Pricesmart
4) Super 24
5) Grupo de Tiendas Asociadas

GDP/Population

Population (millions): 19 million (2025, IMF est.)
GDP (USD): $121.1 billion
GDP per capita (USD): $6,489

Sources: Trade Data Monitor/BICO/IMF/Bank of Guatemala

Strengths/Weaknesses/Opportunities/Threats

Strengths	*Weaknesses*
Guatemala's geographic position in Central America makes it a hub for regional trade.	Rising costs of goods and services can impact pricing strategies and reduce consumer purchasing power.
Opportunities	***Threats***
Consumer interest in organic, gluten-free, and health-focused products creates opportunities for supermarkets to expand their offerings.	Informal markets and small retailers remain strong competitors, especially in rural areas where they are more accessible.

Section 1: Market Summary

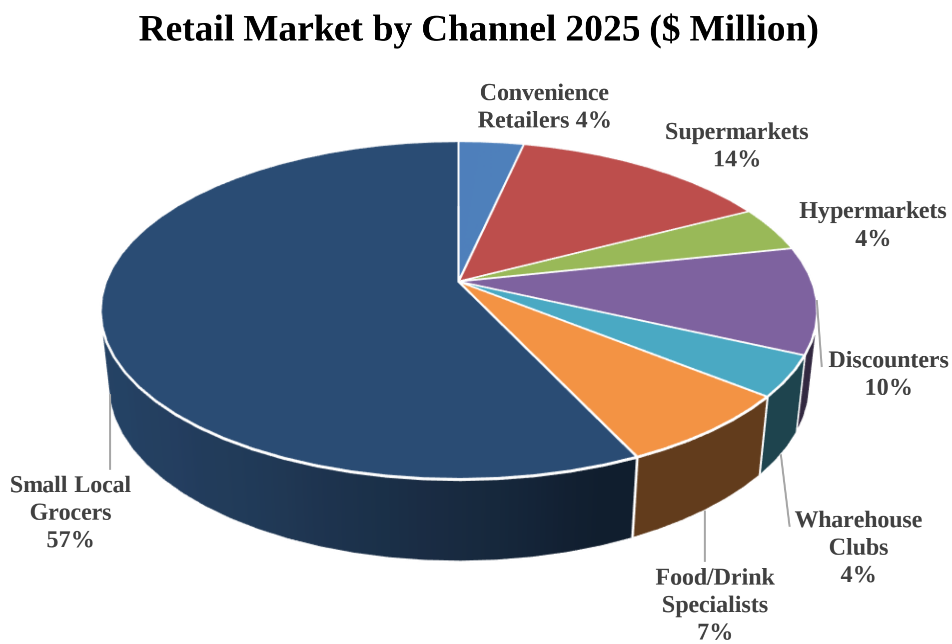
Guatemala is experiencing solid economic growth, with GDP projected to expand between 3.6 and 4.1 percent in 2026. Growth is supported by strong domestic consumption and remittances, which account for nearly 20 percent of the economy. However, structural challenges remain, including high labor informality, widespread poverty, and the agricultural sector's vulnerability to climate-related disruptions.

Guatemala's supermarket industry is also expanding as rising incomes and urbanization drive consumers toward modern retail formats. Major retailers, including Walmart Guatemala and La Torre, continue to expand in urban and rural areas, while distributors are investing in supply chains and cold storage infrastructure to improve efficiency and reduce logistical bottlenecks.

Advantages and Challenges

ADVANTAGES	CHALLENGES
As urban areas in Guatemala expand, supermarkets benefit from increased foot traffic and demand for convenient shopping experiences.	Supermarkets in certain areas may face risks related to theft or organized crime, requiring investment in security measures.
U.S. private label products have an opportunity in the retail industry especially with importing companies that distribute products to the interior of the country.	The government's weak civil service creates a fragile regulatory structure and delays, such as for the registration of new imported products.
Every year more supermarkets are opening stores in the outskirts of Guatemala City and the interior of the country.	Cold chain management continues to be a challenge for distributors in the interior of the country.
Imported products have more opportunities while the supermarket sector continues growing.	Regional competition is strong, especially from Mexico, and other countries within Central America.
High-end consumers are looking for new products that are popular or considered trends in other countries, such as organic, low-carb, no sugar, fat-free, etc.	The nutrition front-of-package labeling initiative is still under revision in Guatemala and might be required for imported products soon.

Retail Sales by Channel



Source: Euromonitor

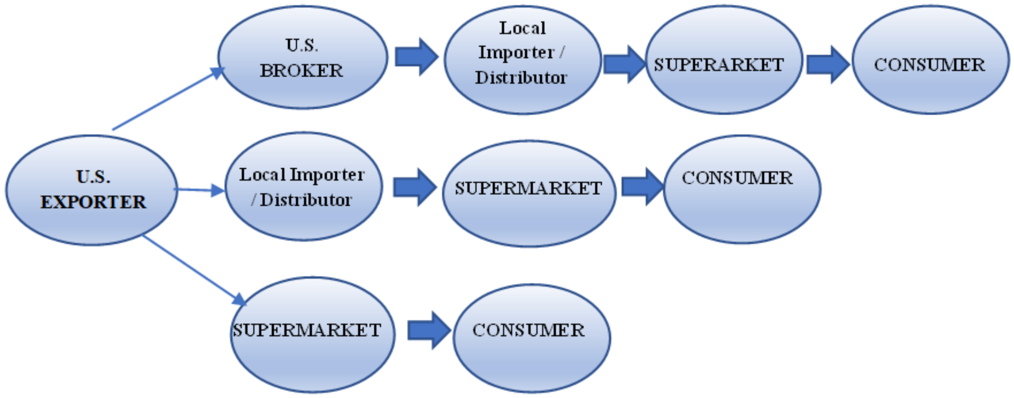
Section 2: Road Map for Market Entry

Entry Strategy

Success in introducing an imported product to the Guatemalan market relies heavily on local representation and personal connections, as Guatemalans are increasingly receptive to international products. For U.S. exporters, a successful strategy requires a thorough understanding of consumer preferences, compliance with local regulatory requirements, and the implementation of an effective marketing campaign.

Hiring a distributor is often the most efficient and practical way to enter the market. Ideally, the distributor should already have established relationships with supermarkets, as these companies possess valuable insights into consumer preferences, targeted demographics, and existing brands within the same category that may pose competition.

A local representative or distributor plays a critical role in providing sales contacts, market intelligence, and guidance on business practices and trade-related laws. In many cases, the distributor also serves as the importer, streamlining the process and ensuring compliance with local regulations. Their expertise and established networks are essential for navigating the complexities of the Guatemalan market and achieving long-term success.



The Foreign Agricultural Service (FAS) office in Guatemala 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 the Guatemalan trade. U.S. suppliers should provide labeling or re-labeling services, competitive pricing, credit, catalogs, printed materials, and samples to importers and distributors to improve the odds of success in entering the market. Firms should also consider providing support to importers by sharing advertising costs of new brands and supporting and training sales personnel.

<u>Market Structure</u>

- The supermarket sector is dominated by a few large supermarket chains such as Walmart, Unisuper, Pricesmart, and Grupo de Tiendas Asociadas. These supermarket chains benefit from economies of scale, extensive supply chain networks, and brand recognition.

- Smaller supermarket chains are located near neighborhood communities, have personalized customer service, and in some cases, they offer specialized product categories. However, their market share is limited due to fewer resources, and less brand visibility.

- The informal sector has a significant portion of grocery shopping and includes municipal markets, corner stores, and street vendors.

- Online shopping is emerging due to an increase in urbanization, improved internet access, and traffic. High-end shoppers prefer online shopping to avoid traffic in the urban areas.

- Typically, imported products are introduced into the country by a local importer, agent, or distributor.

- Importers who work with brokers often prefer those based in Miami to help reduce transportation costs.

Company Profiles & Top Host Country Retailers

Walmart Mexico and Central America: http://www.walmart.com.gt/ (in Spanish)

Unisuper: http://www.supermercadoslatorre.com/ (in Spanish)

Super Del Barrio: https://gta.com.gt/ (in Spanish)

Pricesmart:. https://shop.pricesmart.com/gt/ (in Spanish)

Import Procedures

In Guatemala, the supermarket sector must adhere to strict import procedures, including compliance with customs regulations, documentation requirements, and standards established by the Guatemalan government. Food laws in Guatemala are governed by a combination of laws, presidential decrees, and ministerial regulations designed to protect human, animal, and plant health. Responsibility for food oversight is divided between two key ministries:

- **The Ministry of Agriculture, Livestock, and Food (MAGA):** Oversees fresh, refrigerated, or unprocessed frozen food products, as well as pet food and treats.
- **The Ministry of Public Health and Social Assistance (MSPAS):** Regulates processed food *products, except for items under MAGA's jurisdiction.*

Certain food products, such as seeds used as ingredients, flour, and processed foods of animal origin, fall under the shared authority of both ministries. For detailed information on import procedures and regulations, refer to the 2025 Food Agricultural Imports Regulations & Standards (FAIRS) Report available at: https://gain.fas.usda.gov/#/search

Distribution Channels

The supermarket sector in Guatemala utilizes a diverse range of distribution channels, including direct distribution, wholesale networks, local producer and farmer supplies, import channels, informal networks, e-commerce and delivery services, regional distribution hubs, and specialized channels. Imported goods are typically processed through customs clearance and stored in warehouses before being distributed to supermarkets.

Many supermarkets rely on logistics companies to manage the transportation and distribution of these goods efficiently. Additionally, supermarkets increasingly offer online ordering platforms, allowing consumers to purchase groceries for home delivery or store pickup. Third-party services, such as Glovo and Uber Eats, also provide grocery delivery options, enhancing convenience for customers.

To optimize distribution channels, supermarkets should focus on:

1. **Investing in Technology:** Implement advanced inventory management systems to improve efficiency and reduce waste.

2. **Collaborating with Local Producers and Wholesalers:** Strengthen partnerships to ensure a consistent supply of fresh and locally sourced products.

3. **Expanding Online Platforms**: Develop robust e-commerce solutions to reach more consumers, particularly in urban areas like Guatemala City, where demand for convenience is growing.

These strategies will help supermarkets adapt to evolving consumer preferences and improve operational efficiency in a competitive market.

Share of Major Segments in the Retail Industry

Approximately 70 percent of grocery items in Guatemala are sold in traditional open-air markets, known as "mercados," where local farmers offer fresh, locally grown produce. These markets account for a significant share of national sales, with nearly 90 percent of the produce sold being domestically sourced. Imported fruits, such as grapes, plums, kiwis, apples, pears, nectarines, and oranges, are also available year-round, with demand peaking during the Christmas season.

The two most prominent open-air markets are Cenma and La Terminal, both located in Guatemala City. These markets serve as key hubs for fresh produce, sourced directly from farmers traveling from rural areas across the country. Within these markets, small 3x3-meter stands sell a variety of goods, including meats, seafood, and grocery items ranging from bulk grains to instant soups. Grocery products are typically sold in smaller packaging sizes (e.g., 130 grams), with 95 percent of these items produced locally. Imported grocery products, such as cookies, snacks, instant soups, candies, and chocolates, are available but in limited quantities, reflecting the strong preference for locally made goods in these markets.

Another key component of Guatemala's traditional retail landscape is the corner stores, known as "tiendas de barrio." These small neighborhood shops are a vital source of income for informal retailers, typically operating in spaces averaging 30 square feet with a monthly inventory valued at approximately $500. With an estimated 170,000 stores nationwide, they provide convenient shopping options within a 10-minute walk for most customers. Popular items sold in these stores include snacks, soft drinks, juices, cookies, beer, instant ramen, bottled water, energy drinks, sugar, ice cream, and popsicles. Most shoppers visit daily, purchasing small quantities to meet immediate needs. These stores are favored for their affordability and the availability of products in smaller sizes, which are particularly convenient for households without refrigerators. Their accessibility and tailored offerings make them an integral part of Guatemala's retail ecosystem.

Sector Trends

- **Price Sensitivity Drives Discount Formats:** Despite ongoing changes and adaptations to consumer preferences, Guatemala remains a price-sensitive market. In response, supermarkets have introduced discount formats to cater to budget-conscious shoppers.
- **Expansion Fueled by Urbanization and Growing Middle Class**: Large supermarket chains are increasing their presence across the country, driven by rising urbanization and the growth of the middle class, which is boosting demand for modern retail options.
- **Investment in Technology:** Supermarkets are prioritizing technological advancements, including inventory management systems, customer loyalty programs, and digital payment solutions, to enhance operational efficiency and improve the shopping experience.
- **Focus on Health-Conscious Consumers**: High-end supermarkets are expanding dedicated sections for organic, gluten-free, sugar-free, and other health-focused products to meet the growing demand for healthier options.
- **Commitment to Sustainability:** Supermarkets are adopting environmentally friendly practices, such as reducing plastic packaging and promoting reusable shopping bags, aligning with global trends and consumer expectations for sustainability.

Section 3: Competition

Guatemala is a global net importer, and the United States is Guatemala's largest trading partner. In 2025, Guatemala imported $2.1 billion in U.S. agricultural products and exported $3.1 billion in Guatemalan agricultural products to the United States. Guatemala is a strong competitor to the United States for processed foods; however, it is a large importer of raw materials and ingredients that are used for further processing by this industry. Central American countries and Mexico compete with the United States for the Guatemalan import food market. The free trade agreement between Guatemala and the Central American countries and the agreement between Guatemala and Mexico provide great opportunities for those countries to introduce more products to the Guatemalan market and become stronger competitors with the United States.

Product	Country	Guatemalan imports from this Competitor in 2025 ($ millions)	Guatemala Imports from the U.S. in 2025 ($ millions)
Soups and other food preparations	Costa Rica	217	118
Bakery goods, cereals, & pasta	El Salvador	111	30
Condiments and sauces	Mexico	96	39
Non-alcoholic beverages (ex. juices, coffee, and tea)	El Salvador	40	18
Beer	Mexico	32	2
Chewing gum and candy	Mexico	26	10
Dog and cat food	Mexico	24	17
Processed fruits	El Salvador	23	8
Spices	Honduras	13	1
Wine and related products	Chile	6	2

Source: Trade Data Monitor

Section 4: Best Product Prospects

Considering imported food products are priced premium when reaching supermarket shelves, exporters should consider well-known brands, high-end attributes, one-year shelf life or more, attractive packaging, and products that confer status and a level of innovation. Products that combine these characteristics are more likely to enter the market successfully.

Top Consumer-Oriented Products Imported from the World	Food preparations, cheeses, cookies, breakfast cereals and pasta, chicken leg quarters, chicken wings, fruit juices, nectars, French fries and other potato frozen products, red meats (beef and pork), fresh fruits (grapes, apples, kiwis, oranges, tangerines, pears)
Top Consumer-Oriented Products Imported from the United States and Products Present in Market with Good Sales Potential	Red meats (beef and pork), poultry (chicken leg quarters, MDM), dairy products (cheeses), processed vegetables (French fries and frozen potato products), fresh fruits (grapes, apples, pears), frozen ready to eat foods, condiments, sauces, distilled spirits (vodka, whiskey)
Products Not Present in Market with Good Sales Potential	Beer and wine, baby food, chocolate and candy, jams and jellies, breakfast cereals, prepared/preserved seafood, canned fruits and vegetables, ice cream and yogurts
Product Not Present in Market due to Significant Barriers	None

Section 5: Key Contacts and Further Information

Government regulatory agency contacts within ministries responsible for food policies.

Government Regulatory Agencies	Contact Information
Ministerio de Salud y Asistencia Social (Ministry of Health) **Contact: Ms. Evelyn Meneses, Director for Food and Drugs Regulations**	**E-mail:** emeneses@mspas.gob.gt **Website:** www.mspas.gob.gt
Ministerio de Agricultura, Ganadería y Alimentación (Ministry of Agriculture) **Contact: Nelson Ruano, Food Safety Director**	**Email:** mvnelsonru@yahoo.es **Website:** www.maga.gob.gt
Ministerio de Economía **(Ministry of Economy)** **Contact: Victoria Meza, CAFTA-DR Administrador**	**Email:** vmeza@mineco.gob.gt **Website:** www.mineco.gob.gt
Superintendencia de Administración Tributaria **Guatemalan Tax Authority - Customs** **Contact: Edwin Curtidor, Customs Intendent**	**Email:** eocurtidor@sat.gob.gt **Website:** www.portal.sat.gob.gt/portal

For additional information on import regulations and standards, please refer to the Food Agricultural Import Regulations and Standards (FAIRS) Country Report 2026 at https://fas.usda.gov/data/guatemala-fairs-annual-country-report-7. For more information about specific export certificate requirements, please refer to the FAIRS Export Certificate Report 2026 at https://fas.usda.gov/data/guatemala-fairs-export-certificate-report-annual.

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Attachments:

No Attachments