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Report Highlights:

2025, Honduras imported $3.7 billion in agricultural and related products from the world. U.S. exports to Honduras totaled $1.4 billion, representing approximately 39 percent of the market and a 0.5 percent increase from 2024, making Honduras the 25th-largest global market for U.S. agricultural and related products. Consumer-oriented food imports totaled $2.2 billion, up 6.7 percent from 2024, and reached 1.3 million metric tons, an increase of 4.7 percent. U.S. exports of consumer-oriented products to Honduras surpassed $671 million, up 9.6 percent from the previous year.

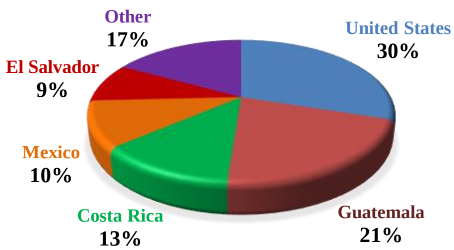
Executive Summary

Honduras is a lower-middle-income country with a GDP of $41.5 billion, ranking 112th globally. In 2025, GDP grew 3.3 percent and inflation stood at 4.5 percent. With a population of 11.1 million, GDP per capita is approximately $3.3 thousand. The United States is Honduras' largest agricultural trading partner. In 2025, U.S. consumer-oriented food exports increased by $59 million, or 9.6 percent, in value and 59 thousand tons, or 2 percent, in volume.

Consumer Oriented Agricultural

Honduras' consumer-oriented food imports exceeded $3.5 billion in 2025, with imports from the United States totaling more than $671 million.

Chart 1: Top Exporting Countries to Honduras



Food Retail Industry

Honduras's grocery retail sales, including online sales, reached $2.2 billion in 2025, with the food sector projected to grow by 6.7 percent. Despite signs of slowing growth, Despensa Familiar, La Colonia, and Walmart Supercenter, Honduras's top three retailers, plan to maintain investment. Together, they account for 14.3 percent of retail revenue.

Food Processing Industry

As of the end of January 2025, Honduras imported $563 million in bulk Agiruclutral Products, an increase of $50 million compared to the same period in 2024. The growth was driven primarily by increased imports of food ingredients such as corn, rice, and wheat, meslin from the United States for processing.

Food Service Industry

In 2025, Honduras's food service sales totaled $791 million. The restaurant sector outpaced hotel growth, with the combined industry expanding by 4.2 percent, driven primarily by rising demand for dining and delivery services.

Quick Facts CY 2025

Imports of Consumer-Oriented U.S. Products
$671 million

List of Top 10 Growth Products in Host Country

1. Cotton	2. Pork & pork products
3. Dairy products prod.	4. Corn
5. Soybean meal	6. Beer
7. Bakery goods, cereals & pasta	8. Condiments & sauces
9. Food preparations	10. Fresh vegetables

Food Industry by Channels (U.S. million)

Retail Food Industry	$2,200
Food Service-HRI	$791
Food Processing	$563
Agricultural & Related Products	$3,707

Top 10 Host Country Retailers

1. La Colonia	2. Despensa Familiar
3. Walmart Supercenter	4. Distribuidora La Antorcha
5. Maxi Despensa	6. Paiz
7. El Colonial	8. Pricesmart
9. Comisariato Los Andes	10. Supercoop

GDP/Population
Population: 11.185 million
GDP (*current prices*): $41.5 billion
Annual Inflation rate: 4.5 percent (Est.)

Sources: International Monetary Fund

Strengths/Weaknesses/Opportunities/Threats

Strengths	*Weaknesses*
Expedited on-line import process	Small domestic market size and low per capita GDP
Opportunities	***Threats***
Strong consumer demand for value, high-quality	Political and economic uncertainty. Restriction on the allocation of foreign currency (USD).

Section 1: Market Summary

Remittances to Honduras reached a record $12.21 billion in 2025, up from $9.74 billion in 2024, driven largely by increased transfers from the United States amid migration uncertainty. Remittances account for more than 25 percent of GDP and provide an important source of income for over 60 percent of households living in poverty.

Supermarkets and modern grocery retailers are experiencing growth, catering primarily to higher socioeconomic groups. These chains are actively investing in expansion, modernization, and remodeling efforts. Many are also increasing their private label offerings, which appeal to cost-conscious consumers while providing higher margins and reducing supply chain risks for retailers. Private labels are becoming increasingly attractive as impulse buying declines and value-driven purchasing becomes more prevalent.

Despite the growth of modern retail formats, traditional retail channels, such as small local grocers, remain the dominant sales outlets across the region. This is especially true in rural communities, where access to modern supermarkets is limited. Small local grocers, known as pulperías, are deeply embedded in Honduran culture and serve as the primary sales channel for food and beverages. These stores provide convenient access to essential items, particularly in rural areas.

The Consumer-Packaged Goods (CPG) market in Honduras is driven by steady demand for everyday essentials. Recent consumer insights indicate that Hondurans are making fewer shopping trips but increasing their purchase volume by 2.3 percent per visit. Among lower-middle-income populations, there is a noticeable shift toward smaller product formats and greater interest in low-cost brands.

Supermarkets have gained dominance over traditional importers, prompting the latter to invest more in marketing and brand visibility. For new entrants to the market, partnering with a Honduran distributor with strong market penetration is essential.

Advantages	**Challenges**
Major retailers have expanded the number of stores and floor space in recent years, with plans for continued growth.	The market is highly price-sensitive, and lower-quality products often outperform higher-quality ones due to pricing.
Honduras benefits from a privileged relationship with the United States, including preferential trade agreements under DR-CAFTA and a U.S. military presence.	The economy remains highly vulnerable to global economic shifts, particularly those originating in the United States. Adverse developments can disrupt remittances, tourism, and investment flows.
Food industry technology innovations help business owners better understand and exceed customer expectations.	Political and economic uncertainty continues to pose risks.
U.S. exporters consistently provide diverse food and beverage items year-round.	Lack of Spanish-language labeling and marketing materials can hinder product adoption.

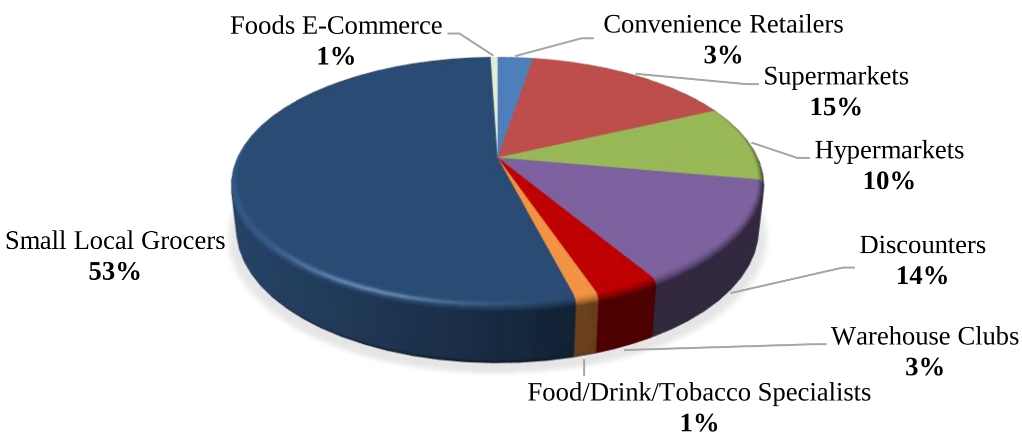
Retail Sales by Channel

Honduras' food and beverage retail sales grew by $50 million in 2025, an increase of less than 6.7 percent. Trade Data Monitor estimated grocery retail sales, including online sales, at $2.2 billion. Small local grocers remain the leading retail channel, accounting for 53 percent of the market.

Pricing and promotions are expected to be significant drivers for retail channels during the forecast period, as consumers increasingly wait for seasonal and occasional deals before making purchases. Between 2023 and 2025, channels offering favorable deals have outperformed others in terms of value growth, reflecting consumers' inflation-driven focus on cost efficiency.

Although official data has yet to be released, Honduras is following the global trend of retail businesses developing private label brands. Over the past few years, supermarkets have significantly expanded their private label offerings, effectively marketing them through dedicated store sections and in-store promotions. Since 2023, gas station convenience stores have diversified their offerings and expanded their minimarket footprint into neighborhoods, increasingly competing with traditional small local grocers.

CHART 2: RETAIL MARKET BY CHANNEL 2025 ($ MILLION)



Source: U.S. Census Bureau / © Euromonitor International

Section 2: Road Map for Market Entry

Exporters entering the Honduran market should exercise diligence when selecting a local partner, such as an importer, agent, or legal representative. Personal visits or meetings with prospective partners are highly recommended to establish trust and assess compatibility. Exporters should also conduct thorough background checks on potential partners before signing permanent contractual agreements.

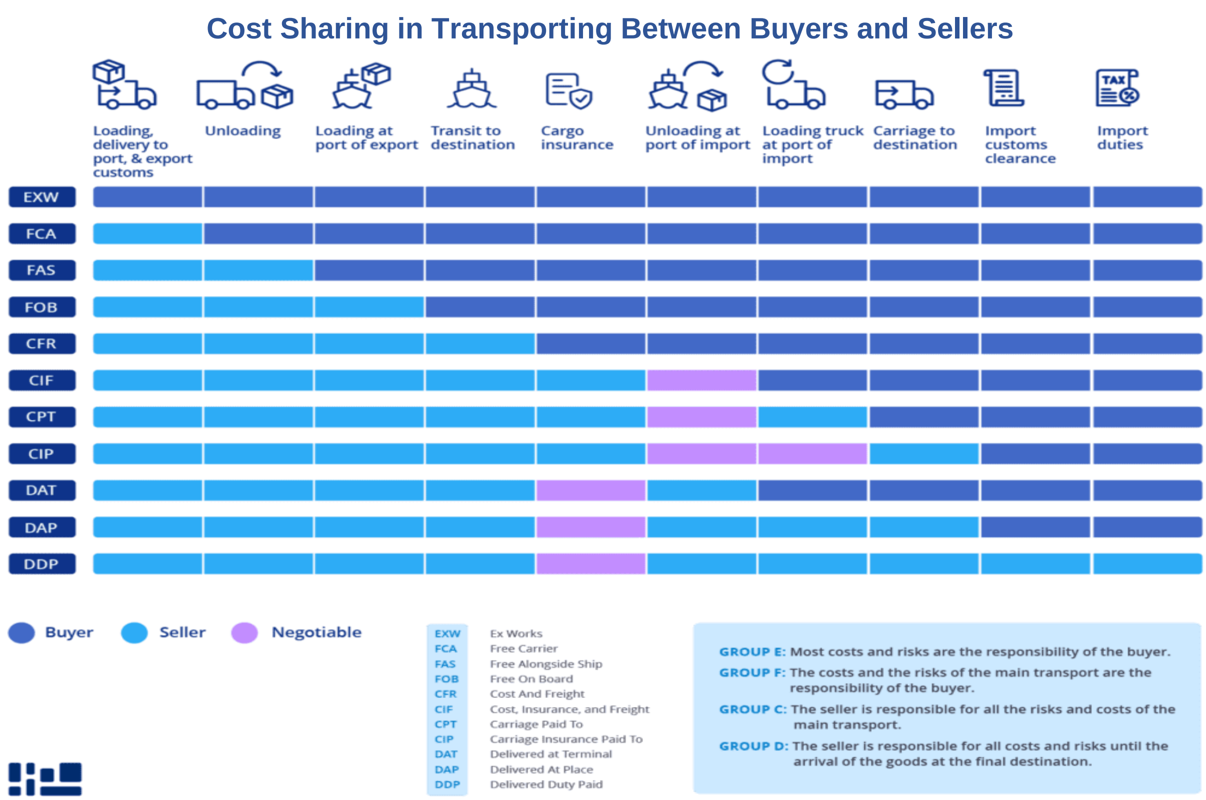
Small-to-medium-sized exporters can leverage the resources of U.S. State Regional Trade Groups (SRTGs) for marketing and promotional support in Honduras. Below is a list of SRTGs by geographic region, along with their websites:

National Association of State Departments of Agriculture (NASDA) www.nasda.org	**Western U.S. Agricultural Trade Association (WUSATA)** www.wusata.org
Southern U.S. Trade Association (SUSTA) www.susta.org	**Food Export USA** www.foodexport.org

Partnering with experienced local importers or distributors is highly valuable, as they help U.S. companies navigate regulations, labeling standards, and customs clearance. Since major Honduran supermarket chains typically handle their own purchasing and importing, companies working with them must have sufficient production capacity to meet high volume demands.

U.S. companies should also specify the appropriate Incoterms in their commercial contracts. Incoterms are internationally recognized standards that define the responsibilities of buyers and sellers for managing cargo, including costs, logistics, transportation, insurance, documentation, and customs clearance. However, Incoterms do not address issues such as property rights, force majeure, or breach of contract, which should be covered separately in the sales agreement.

It is important to note that insurance responsibilities vary among Incoterms. Only the "C" terms explicitly assign insurance obligations, which may result in additional insurance costs for buyers. Exporters should carefully evaluate the Incoterms used in their contracts to ensure clarity and avoid unexpected liabilities.



Source: Freightos

Retail Company Profile

Source: 1 Revista Estrategia y Negocios

Central American retail is evolving as physical expansion, new store formats, artificial intelligence, e-commerce, logistics, and increasingly price-sensitive consumers reshape competition. In Honduras, Supermercados La Colonia continues to expand, while Walmart Central America is strengthening its omnichannel and technology strategy. Retailers are increasingly competing through data, convenience, product assortment, private labels, digital services, and logistics. According to Euromonitor, Honduras' online and offline grocery retail sales reached $2.2 billion in 2025, up 6.7 percent from the previous year.

- **Walmart:** Wal-Mart Centro América S.A. maintains its leadership position in grocery retailing in Honduras, operating 114 retail locations across four store formats:

Discount Stores (74): Despensa Familiar and Maxi Despensa.	**Warehouses (28):** Maxi Despensa.
Supermarkets (8): Paiz.	**Supercenters (4):** Walmart.

Walmart is Honduras' leading grocery retailer. According to Euromonitor, its 114 stores across four formats generated $953 million in retail sales in 2025, representing an 11.1 percent market share. Walmart operates four Supercenters, 74 Despensa Familiar stores, 28 Maxi Despensa stores, and eight Supermercados Paiz locations. In 2023, Walmart also invested $1.5 million in a new distribution center in San Pedro Sula equipped with technology to maintain the cold chain and improve product distribution.

Walmart has also been investing in its e-commerce platform to improve the online shopping experience for consumers. These efforts include integrating a broader range of products and enhancing the overall digital shopping experience. These investments reflect Walmart's commitment to strengthening its operations and adapting to the evolving needs of the Honduran market.

- **Supermercados La Colonia:** Supermercados La Colonia ranks second in Honduras' grocery retail market and leads in top-of-mind brand recognition. In 2025, the company operated 76 traditional stores and four additional-format locations, generating $618 million in retail sales and holding a 7.2 percent market share. La Colonia expanded its store network by 9 percent, while retail sales recorded a three-year CAGR of 7.8 percent from 2023 to 2025. The company also introduced a smaller gourmet-format store targeting higher-income consumers, reflecting evolving market trends and preferences.

- **Distribuidora La Antorcha:** La Antorcha Supermarket, located in El Progreso's central market, ranks third in Honduras' grocery retail market, with a 1.3 percent market share and $113 million in retail sales.

- **El Colonial:** Corporación La Cumbre operates three El Colonial Supermarkets in San Pedro Sula, ranking fourth in Honduras' grocery retail market with $85.6 million in retail sales. The chain also offers its own Colonial Fresh line of ready-to-go products, including charcuterie items such as ham and cheese platters, along with a curated wine selection.

- **Others:** The retail landscape in Honduras has seen growth in on-the-go convenience stores, such as Circle-K, Super 7, Star Mart, and Pronto Minix. Additionally, there is an increasing presence of small gourmet stores offering premium cuts and specialty products catering to elite clientele.

Import Procedure

Honduras has specific import procedures for food and beverage products, which are designed to ensure compliance with local regulations, protect public health, and facilitate trade. Below is an overview of the key steps and requirements.

Inspection and Documentation Requirements:

- SEPA, ARSA, and ADUANAS inspectors assess food and agricultural imports at the port of entry to ensure compliance with SENASA-approved import permit requirements.
- Electronic documentation review includes Import Permit, Phyto/Zoo sanitary Export Certificate, Certificate of Origin, Commercial Invoice, Bill of Lading, and Packing List. Information must be consistent across documents, including details about importer, exporter, shipment content, amounts, product description, country of origin, and point of origin.

Product Inspection and Standards:

- SEPA inspectors physically inspect products. SENASA mandates that animal-derived products display production and expiration dates on shipping boxes and primary packages in DD/MM/YYYY format.
- Ports of entry enforce these standards rigorously. SEPA requires date stamps even for bulk products like beef chops.

Food Safety and Quarantine:

- The safety of animal products and byproducts for human consumption is crucial for entry. The exporting country's animal health and pest status are also considered.
- SEPA's Quarantine Treatment Services (SITC) unit treats quarantine pests before product admission. Non-quarantine pests, whether alive or dead, do not receive treatment.

Customs Clearance and Sampling:

- Customs clearance depends on document submission type (electronic/hard copy), rule compliance, and pest detection. Inconsistent paperwork or pest detection results in product detention or rejection by SENASA.
- Product sampling is random and includes animal products, seeds with import permission, and bacteria or fungi. Samples are analyzed for physical, chemical, and biological properties.

Port Operations and Compliance:

- Puerto Cortes, Honduras' largest port, has dedicated terminals for cargo handling. OPC handles container loading/unloading, while TEH handles bulk goods.
- All wooden pallets must have the NIMF-15 stamp or require fumigation upon arrival. Non-compliance with NIMF-15 regulations led to 445 seizures in 2020, with 95 percent of 2021 seizures from the US.

Additional Considerations:

- **Free Trade Agreements (FTAs):** Honduras is a member of the Central America-Dominican Republic Free Trade Agreement (CAFTA-DR), which may provide preferential tariff treatment for certain U.S. food and beverage products.
- **Restricted and Prohibited Items:** Certain products, such as unpasteurized dairy or items containing *Cannabis sativa* or harmful additives, may be restricted or prohibited.
- **Quality Standards:** Imported food and beverages must meet Honduran quality standards, which align with international norms (CODEX).
- **Documentation:** Ensure all documentation is complete and accurate to avoid delays.

For detailed information on import permit requirements, refer to Honduras GAIN Reports: Food and Agricultural Import Regulations and Standards and FAIRS Export Certificate Report.

Section 3: Competition

The country pursues an open and expanding trade policy, supported by 12 Free Trade Agreements (FTAs) with 36 nations, many of which are multilateral.

Key FTAs include agreements with:

- United Kingdom
- European Union
- Panama
- Colombia
- Chile
- South Korea
- Mexico

Additionally, Honduras has bilateral FTAs with Canada and Peru. The country is in the early stages of negotiating an FTA with China, which could further diversify its trade relationships and strengthen its position in global markets.

The free trade agreement between Honduras and other Central American countries, along with the agreement between Honduras and Mexico, creates significant opportunities for these nations to expand their product offerings in the Honduran market and enhance their competitiveness with U.S. exports. Honduras is also a member of the Central American Economic Integration System (SIECA), alongside Guatemala, El Salvador, Nicaragua, Costa Rica, and Panama.

Product Category	U.S.A Market Share 2025 (%)	Market Share (%) by Vol.
Non-Alcoholic Bev. (ex. juices, coffee, tea)	10.8%	Guatemala 45.3, El Salvador 36, Taiwn 3,5
Fresh Fruit	17.8%	Guatemala 70.1 , Nicaragua 8.3, Mexico 6.2
Beer	48.6%	Nicaragua 21.7, Mexico 13.8, El Salvador 7,3
Fresh Vegetables	16.3%	Guatemala 61.9, Netherlands 12.3, Mexico 6.5
Bakery Goods, Cereals, & Pasta	14.8%	Guatemala 41.4, El Salvador 19.9, Mexico 9.5
Processed Vegetables	18.9%	Belgium 29.6, China 6.1, Netherlands 5.6
Pork & Pork Products	91.3%	Canada 7.4, Guatemala 0.7, Costa Rica 0.2
Dairy Products	37.8%	Guatemala 19.5, Costa Rica 15.7, Mexico 9.6
Condiments & Sauces	20.3%	Guatemala 47, Costa Rica 20.1, Mexico 4.7
Dog & Cat Food	3.6%	Guatemala 56.3, El Salvador 20.4, Mexico 17.3

Source: U.S. Census Bureau / Trade Data Monitor

Section 4: Best Product Prospects

Top Consumer-Oriented Products Imported from the World

Non-alcoholic beverages, fresh fruit, beer, fresh vegetables, and bakery goods and cereals account for 65 percent of Honduras' consumer-oriented imports by value and are among the country's fastest-growing import categories.

Top 10 Consumer-Oriented Imports from the World in 2025 (volume in tons)

Product Category	Un.	2024	2025	Volume Δ 2025/2024 (T)	Volume Δ 2025/2024 (%)	AVG 5 YR	GROWTH 5 YR
Non-Alcoholic Bev. (ex. juices, coffee,	T	250,881	259,352	8,471	3%	252,802	0%
Fresh Fruit	T	228,126	250,864	22,738	9%	224,551	3%
Beer	T	111,875	116,910	5,035	4%	102,894	3%
Fresh Vegetables	T	117,689	112,350	(5,339)	-5%	108,424	3%
Bakery Goods, Cereals, & Pasta	T	97,322	99,281	1,959	2%	94,570	2%
Processed Vegetables	T	59,011	65,028	6,017	9%	58,930	3%
Pork & Pork Products	T	56,173	64,748	8,575	13%	53,454	5%
Dairy Products	T	55,024	61,282	6,258	10%	55,747	4%
Condiments & Sauces	T	46,396	49,436	3,040	6%	45,077	3%
Dog & Cat Food	T	49,617	44,985	(4,632)	-10%	45,769	2%
Soup & Other Food Preparations	T	33,927	38,890	4,963	13%	34,888	3%

Source: U.S. Census Bureau / Trade Data Monitor LLC

Consumer-Oriented Products Imported from the United States

The top five consumer-oriented import categories from the United States by value are: pork and pork products, beer, nonalcoholic beverages, dairy products and fresh vegetables

Top 10 Consumer-Oriented Imports from the United States 2025 (volume in tons)

Product Category	Un.	2024	2025	Volume Δ 2025/2024 (T)	Volume Δ 2025/2024 (%)	AVG 5 YR	GROWTH 5 YR
Pork & Pork Products	T	52,550	59,129	6,579	12.5%	50,038	4%
Beer	T	57,630	56,776	(854)	-1.5%	52,120	1%
Non-Alcoholic Bev. (ex. juices, cof	T	26,154	27,890	1,736	6.6%	23,230	9%
Dairy Products	T	19,484	23,148	3,664	18.8%	21,041	7%
Fresh Vegetables	T	19,731	18,348	(1,383)	-7.0%	17,063	7%
Bakery Goods, Cereals, & Pasta	T	14,648	14,639	(9)	-0.1%	14,551	0%
Poultry Meat & Prods. (ex. eggs)	T	13,961	12,760	(1,201)	-8.6%	13,667	-4%
Processed Vegetables	T	10,494	12,302	1,808	17.2%	11,624	-2%
Fresh Fruit	T	10,606	11,993	1,387	13.1%	10,044	2%
Soup & Other Food Preparations	T	9,997	10,948	951	9.5%	10,145	3%

Source: U.S. Census Bureau Trade Data Monitor

Products Present in Market with Good Sales Potential

Beer

Beer dominates Honduras' alcoholic beverage market, with small local grocers serving as the primary sales channel. Demand for premium and craft beer is growing, particularly among younger consumers, while wine consumption is also increasing among higher-income consumers. In 2025, U.S. beer exports to Honduras declined 1.5 percent by volume, while Honduras' total beer imports grew 4 percent to $107 million.

Soups and other food preparations

Honduras imported $472 million in soups and other food preparations in 2025, down 0.5 percent from the previous year. The United States accounted for 29.4 percent of imports by volume, followed by Guatemala at 24.2 percent. The category benefits from strong demand for convenient and ready-to-eat foods.

Bakery goods, cereals, and pasta

Honduras imported $254 million in bakery goods, cereals, and pasta in 2025, up 4.7 percent from the previous year. Guatemala led the market with a 38 percent share, followed by El Salvador at 20 percent and the United States at 15 percent. Major imports include bread, pastries, cakes, biscuits, pasta, and cereal products, reflecting strong demand for affordable and versatile foods.

Dairy products

Honduras' dairy sector is led by local producers, including Lácteos de Honduras (Lacthosa) and Nestlé de Honduras. Frequent power outages pose challenges for refrigeration and sales of perishable dairy products. In 2025, Honduras imported $226 million in dairy products, down 11.9 percent from the previous year. The United States led the market with a 39 percent share by volume, followed by Guatemala at 21 percent, Mexico at 14 percent, and Costa Rica at 13 percent.

Pork and pork products

In 2025, Honduras imported $202 million in pork and pork products, with the United States supplying 91.3 percent of that total, a 2 percent decrease in value from the prior year, despite a 13 percent increase in volume over the same period. Pork remains a staple protein in Honduran diets, and the United States continues to dominate this category.

Products Not Present in Market with Good Sales Potential: All food products are present.

Product Not Present in Market due to Significant Barriers: None

Section 5: Key Contacts and Further Information

National Plant, Animal Health, and Food Safety Service / Servicio Nacional de Sanidad e Inocuidad Agroalimentaria (SENASA)
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FAS/Tegucigalpa encourages U.S. exporters to review the Food and Agricultural Import Regulations and Standards (FAIRS) Country Report and the FAIRS Export Certificate Report to better understand the Honduran import regulations, standards, and procedures that apply to their products.

Agricultural Affairs Office	Phone: +504 2236-9320 ext. 4354, 4544
Address: Avenida La Paz. Tegucigalpa 11101, Honduras	Email: AgTegucigalpa@state.gov www.fas.usda.gov

Attachments:

No Attachments