Doing Business In Guatemala: The 2008 Country Commercial Guide for U.S. Companies

Chapter 4: Leading Sectors for U.S. Export and Investment

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Automotive: Accessories and Service Equipment

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Automotive Parts Trade Balance

(USD Thousands)

	2004	2005	2006	2007(e)
Exports from U.S.	224,947	229,047	233,627	252,317
Imports from U.S.	1394	981	1000	1080

Source: SIECA

The Guatemalan market for Automotive Parts, Accessories and Service Equipment continues to grow steadily. A large volume of used vehicles are purchased directly from US salvaged car auctions and repaired locally. In average, Guatemalans keep their automobiles for 5-7 years before purchasing a newer model. Import taxes for new cars are considered high (in between 10-20 percent); hence purchasing new models is not common. Given these factors, there are a large number of used vehicles on the roads. These cars require continuous maintenance and replacement services. Importers of automotive equipment for service stations have reported good sales in the past two years and expect to continue doing so. Equipment is sold to local mechanic shops, service stations and gas stations. The enormous amount of used vehicles circulating has stimulated the need for this kind of equipment. Automotive parts importers have to keep up with the demand from local importers of used cars, who need parts to repair sometimes, severely damaged cars.

Almost fifty percent of all Automotive Parts, Accessories and Service Equipment are imported from the U.S. Asian manufacturers are entering aggressively into the market with low priced products, it is estimated that almost eighty percent of the cars circulating in Guatemala represent Asian brands. For this reason, the other fifty percent of imports do come from Asia and is shared with Brazil and Europe as well.

Customs records for Guatemala report that the US has a fifty percent market share, but this does not necessarily mean that products are manufactured in the US, as in some cases cars sold by American distributors are assembled overseas.

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The most promising sub-sectors for U.S. products within the industry include aftermarket products such as: bumpers, spoilers, tail lights, wheels, sound systems, alarms, tires, batteries, suspension kits, mufflers, filters, chips, exhaust systems, brakes, windshield wipers, spark plugs, wheel covers, steering wheels, etc.

Other promising products are service equipment such as: lifts, tire repair, electronic diagnosis, tire balancing, compressors, and in general all necessary equipment and tools for service stations.

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There are more than one hundred spare parts and service agents in Guatemala. Due to the large demand for aftermarket products and service tools and equipment, the majority of these agents and distributors, whether they are large size companies or a small entrepreneur, are always open to look at new alternatives to offer their customers. It is very important to note that this market is completely price driven and that Asian brands are well positioned in the market. Innovative, high tech, unusual products are a good opportunity for US manufacturers as long as the prices remain competitive.

Market Size: Over 1,500,000 vehicles (2007)

U.S. Auto Parts Exports: USD 213 million (2004)

Impact of Tariff Reduction: Immediate elimination on automotive parts tariffs, which had ranged from 1 to 20 percent, provides immediate cost savings.

Other Trade Agreement Impacts:

Origin rules in CAFTA-DR allow remanufactured parts to qualify for duty free treatment potentially expanding the market for these products in the CAFTA-DR region.

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- U.S. Commercial Service in Guatemala: www.buyusa.gov/guatemala
- Official website for Government Tenders: www.guatecompras.gt
- Guatemalan Chamber of Commerce: www.negociosenguatemala.com
- Tax information official website: www.sat.gob.gt
- Statistical information: www.sieca.org.gt

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Food Processing and Packaging

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Food Processing and Packaging Equipment
Thousands of
USD

Year	2005	2006	2007	2008(e)
Total Imports	70,200	98,400	132,800	179,300
Local Production	47,700	50,100	65,100	91,100
Exports	2,600	2,600	3,100	3,900
Total Market	115,300	145,900	194,800	266,500
Imports from U.S.	28,000	36,300	45,400	56,700

Source: SIECA
(e) estimated

U.S. exports of food processing and packaging equipment to Guatemala increased 29 percent during 2006 and the U.S. holds a 37 percent of the total import market in this industry.
Guatemala's outlook for future market demand for food processing and packaging equipment is good. The import market for this type of equipment is favorable for several reasons:

- The CAFTA-DR Agreement between the U.S. and Guatemala was implemented on July 1, 2006. This agreement allows 80 percent of U.S. exports of consumer and industrial products to enter duty free in Central America, with the remaining tariffs phased out over a period of 10 years.

- The tourism industry has increased over the past few years and is expected to continue to do so in the next years. The increase in tourism has been and will be a positive factor for the hotel/motel, restaurant, fast food and cafeteria industries.

- New shopping malls, convention centers, movie and food courts have opened and are under construction. These will all have new restaurants, especially fast food outlets.

- The Guatemalan food processing industry is increasing its level of competitiveness, in upgrading its industry standards, in implementing new technologies that will comply with changing importers' regulations and certification requirements. Guatemala's processing and packaging industry poses interesting possibilities for U.S. manufacturers of machinery, equipment, supplies and services, as well as for U.S. technology transfer.

- Guatemala and its agro-industry sector are preparing to increase its production of non-traditional agricultural products, such as vegetables, fruit and flowers.

Guatemalan exporters wish to pursue expansion plans to not only increase production but also to improve the quality of their products.

- There is an increasing interest among Guatemalans and some foreigners living in Guatemala, to become gourmet chefs and to open restaurants.

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The following have shown to be best sales prospects, in accordance to local industry sources:

- Cleaning, bottling, filling and sealing machines for bottles and cans
- Parts and supplies for use to cleanse, dry and seal containers
- Machinery and parts for food and beverage processing
- Machinery for filling, closing, labeling plastic bags, thermo-sealing
- Milling, grinding and handling machines for grains, cereals and legumes
- Machinery for the baking industry and for the preparation of candy, chocolate, sugar, dairy, beer, meat, fish, fruits and vegetables.
- Cooking stoves, ranges, ovens, microwave ovens
- Automatic beverage-vending machines with refrigerating and heating devices

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Domestic Production

Except for a large manufacturer of stoves, ranges, ovens and refrigerators, local production is limited to the manufacture of stainless steel working tables, steel dishwashers, display equipment, cold storage rooms, ranges, and grills. Local firms are becoming increasingly good producers of stainless steel frames and tables that are used in industrial kitchens and are complemented with imported motors for heating and refrigerating.

The quality of these products has improved and exports to El Salvador and Honduras are increasing, at competitive prices.

Guatemala is also manufacturing grain dryers, depulpers, mixers, toasters, dehydrating plants, rice, sugar and salt mills, boilers, distillers, corn huskers and shellers, scales, fruit, vegetable and meat processing equipment, liquid fillers and dosifyers, milk tanks and containers, and some cooking utensils. There are a few local industries which are becoming reliable suppliers of treated cardboard boxes, wrapping materials and specialized containers.

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- Banco de Guatemala, statistics: www.banguat.gob.gt/
- Commercial Service Central America: www.buyusa.centralamerica/en
- U.S. Trade Representatives: www.ustr.gov
- Information on CAFTA-DR: www.ita.doc.gov/cafta/
- SIECA: www.sieca.org.gt/

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Construction Equipment and Building Products

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Guatemala: Imports of Building Products
In Thousands of USD

	2004	2005	2006 (p)
Total imports	326,014.50	357,894.57	447,210.24
U.S. imports	71,000.50	64,914.63	50,179.19
U.S percentage of total imports	21.77	18.13	11.22

(p) Preliminary
Source: SIECA

The construction sector in Guatemala has grown and evolved substantially over the past decade. Although the sector experienced a slowdown from 2000 to 2003, the last few years have been very good for the sector. The Monetary Committee of the Central Bank, one of the major think tanks in the country (ASIES), and the Guatemalan Chamber of Construction estimate growth in the sector reached a peak in 2006 with a 29 percent increase over 2005, and carried on in 2007 with similar growth. This growth is the result of a better investment climate, a pro-business government, and better mortgages and financial terms for consumers. Even with the current slow down of the U.S. economy (which affects Guatemala directly because of the large amount of remittances and because the U.S. is its main export market) and the change in government, experts believe that the construction sector will still continue to grow in 2008.

The construction business in Guatemala differs from the business model in the United States. While in America there are companies that specialize in one aspect of the business such as realtors, developers, constructors and architectural and engineering firms, often in Guatemala the same company is involved in all of those aspects; the same company will see the project from start to finish. Although the sector has become more specialized in the past few years, especially on the larger and higher end projects, one still doesn't find the degree of specialization found in the States.

Another difference between Guatemala and the United States is the preference in construction materials and techniques. The majority of homebuilding in Guatemala is done using cement and concrete blocks. For apartment and commercial buildings, metal structures, steel beams and concrete structures are used. Labor is inexpensive compared to the United States. A construction worker earns on average USD 9 a day and a foreman earns around USD 17. A lot of the construction is done manually without the use of sophisticated equipment and prefabricated items are rarely used, except in commercial and apartment buildings. This also has changed substantially in the past few years with more technology and newer construction techniques being applied in larger projects.

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The following is a list of the most promising categories for 2008:

- tractors
- road construction/paving equipment
- supplies for heavy infrastructure and residential housing projects
- structural metals
- bathroom wares and accessories
- ceramic floors and tiles
- shingle and roof products
- doors and window frames
- kitchen cabinets and countertops
- kitchen and laundry appliances
- plastic pipes and fixtures
- electrical wiring, accessories and fixtures
- dry wall

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There is substantial local production of cement, cement products, aggregates, ceramic floors and tiles, plastic pipes and pluming products, wood and wood products, among other things. There is little local production of higher end finishing products. Guatemala is a price sensitive market. Nevertheless, Guatemala is ranked by the United Nations as one of the countries with the largest income distribution gaps, meaning that there is a good market for higher end products. Many finishing, higher technology, more specialized products are imported from Italy, Brazil, China, Korea, Costa Rica, Spain, Mexico, Colombia and the United States. A positive factor for U.S.-made goods is the excellent reputation that U.S. products enjoy for superior quality and design. They are often priced competitively and U.S. technology offers products not available from domestic sources.

With regards to the Free Trade Agreement between the United States, Central America and the Dominican Republic (CAFTA-DR), ninety-nine percent of U.S construction equipment and over fifty-five percent of building supply exports are now duty-free with a schedule for the rest of the products to become duty free in the next nine years.

Central American tariffs on building supplies are higher on average than for other products in the region, with the highest tariffs ranging up to fifteen percent for products such as valves and home construction accessories such as fixtures, sinks and doors. This should provide American companies great opportunities in the construction sector, especially for those products that, because of tariffs, were previously not price competitive. Currently, tariffs on construction equipment range from zero to fifteen percent.

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- Guatemalan Chamber of Construction: www.construguate.com
- Information and Monitoring Public Projects System: www.simop.info/home.php
- Regional Integration Secretariat: www.sieca.org.gt
- Guatemalan Ministry of Communications and Infrastructure: www.comunicaciones.gob.gt

- Economic and Social Investigation Association: http://www.asies.org.gt/informes.htm

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Hotel and Restaurant Equipment

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Hotel and restaurant equipment has become one of the leading private sector industries in Guatemala. Equipment for these industry sectors is in great demand.

Tourism growth is one of the main contributors for this growth. Visitors to Guatemala are increasing, as the country offers all types of tourist attractions, such as historic and archaeological sites, convention centers, shopping malls, amusement parks, fishing, golfing, ecological resorts, rainforests, bird watching, rafting and adventure tourism. Equipment and supplies to support this sector are therefore in great demand, as the attractions are typically surrounded by hotels, restaurants, cafes and bars. The airports have also been modernized and expanded in Guatemala City and in some rural areas. The U.S. is the leader in restaurant, hotel and bar equipment exports to Guatemala, with approximately 40 percent of the market.

The restaurant industry has been growing for several years. New restaurants are constantly opening, especially fast-food chains and franchises, Internet cafes, ice cream parlors, bakeries and pastry shops, and new shopping malls with food courts.

The hotel industry is expanding in the rural area at greater speed than in the capital. Many boutique hotels are under construction and colonial residences and coffee plantations are being transformed into small hotels. New projects include bungalow-type resorts, apartment-hotels, cabins, hostels and inns. Guatemala is trying to attract international conventions. The city of Antigua has been the one that attracts most of the investment in the hotel industry. Tourists can visit its attractive colonial sites and ruins caused by major earthquakes in the 1700s. Convention spaces in Antigua compete to hold international conventions, large receptions and weddings. Another region that is attracting hotel investment is Retalhuleu, with a huge water and theme park. Managing directors of these parks are building a convention center and sporting arena to be able to host international events.

Modern shopping malls and centers are under construction and others are being planned.

Main Sub-Sectors of this Industry

Sub-Sectors of potential in this industry are:

- Hotel and Institutional Catering Equipment
- Commercial Kitchen Equipment
- Fast Food Equipment
- Food Preparation Equipment
- Restaurant Equipment
- Vending Machines
- Commercial Laundry Equipment
- Resort Furnishings/Equipment
- Refrigeration/Freezing Equipment

Competition

While U.S. products account for the major share of the import market, a wide range of food service equipment from other countries is available that meets diverse purchasing criteria for pricing, quality, after-sales service, delivery time and financing. Equipment manufactured in the U.S., Italy, Germany and Spain have been considered as being of higher quality while those of China and Latin America are considered to be highly competitive in price, but of lower quality.

Local production has increased but is limited to stainless steel tables, food displays and minor supplies. Some ovens and refrigeration cases are also produced locally.

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The most promising commercial opportunities for the Guatemalan market are the following products:

- Cooking appliances: ovens, ranges, broilers, grills, fryers, baking and pasta machines
- Refrigeration compressors and air conditioning
- Dishwashers and laundry machines
- TV apparatus and monitors
- Catering equipment and vending machines
- Kitchen sundries, glassware, china, tableware and flatware
- Franchise opportunities for restaurants and hotels
- Security equipment
- Retractable/flexible convention and event chairs

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Now that the CAFTA-DR agreement has been implemented, more than 80 percent of U.S. exports of machinery and supplies have become duty free in Guatemala immediately, with remaining tariffs phased out over 10 years.

The elimination of tariffs for products in these sectors will make U.S. equipment more price-competitive. Other advantages for U.S. products: virtually no import restrictions; standards similar to the U.S.; a variety of qualified agents and distributors available; growing use of English language in local commerce.

The construction of new projects offer great opportunity for U.S. exporters to pursue such as: new shopping malls, convention centers, exposition and trade fair premises, department stores, golf clubs and sport facilities, theaters and cultural show arenas; the expansion of amusement parks, all of which will require imports of equipment for kitchens, restaurants, hotels and convention centers.

Some of the projects under construction and planning are:

Antigua Guatemala:
- A 5-star Westin Camino Real Hotel – 102 rooms, to be completed in 2009
- A 4-star Radisson Hotel, to be completed in 2008
- The “Reunion Antigua Country Club” with 20 suites, a golf club
- The “Palmeras” with 16 ecologic bungalows

Retalhuleu:
- Five new hotels in the park area have just been inaugurated

- Hotel Trinidad – 36 rooms
- Hotel Mulua – 26 rooms

Izabal: on the Atlantic or Caribbean:

- Mayan Jungle Resort, an $80/100 million project, includes:
- The Jaguar Gold and Country Club and the San Felipe Marina

Alta Verapaz:

- Plaza Magdalena Hotel with 100 rooms

Tikal, Peten:

- A Porta Peten Hotel will open in 2008
- The Vista Real chain will open 10 boutique type hotels in the rural area. In 2008 they will open one on Lake Atitlan, one in Coban, Alta Verapaz and one in Izabal.
- There will also be Porta and Princess Hotels.

Airport Projects:

- Guatemala City's International La Aurora Airport has been upgraded and remodeling is almost complete. Additional terminal and cargo improvements are planned.
- Alternate international Airport San Jose in Escuintla, is near completion
- International Airport Mundo Maya (Tikal ruins) has recently been completed

To be operating in early 2008, are: the International Airports of Quetzaltenango, Huehuetenango, Retalhuleu, San Marcos and Coatepeque. Further airport projects are expected in 2008.

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- U.S. Commercial Service in Guatemala: www.buyusa.gov/guatemala
- Commercial Service Central America: www.buyusa.centralamerica/en
- Information on CAFTA-DR: International Trade Administration: www.ita.gov/cafta
- FEDECATUR – Central American Federacion De Camaras de Turismo: gerencia@jaltepeque.com
- SIECA: www.sieca.org.gt
- Restaurant Assoc., Chamber of Industry Industria Guatemala: www.gremialrestaurantesgt.com/
- Hotel Association: funguat2@itelgua.com

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In late 2007, the Guatemalan Franchise Association was officially formed and has 24 active members and founders. From contacts in the Restaurant Association, figures show that there are approximately 215 franchises with 1220 outlets operating in the Country. The market is expected to grow 10 percent per year during the next few years. “Francorp”, a leading worldwide franchise firm, founded 30 years ago in Chicago, IL, opened a permanent office in Guatemala in January 2008. According to this institution’s representatives, Guatemala is the most organized country in the region when it comes to franchise development.

The ratification of CAFTA-DR – Central American Free Trade Agreement, will increase franchise investments in Guatemala and in the rest of the Central American countries. As of today, Guatemala has 190 out of 200 franchises represented in the Central American Region.

Great interest to open new franchises has been shown by young entrepreneurial groups or individuals.

Although no specific legislation exists for the franchise industry/service, franchise companies operating in Guatemala are subject to normal trade laws, such as paying a tax percent on royalties and a value added tax of 12 percent. The CAFTA-DR Agreement is providing full market access to franchising. Trademark provisions will protect the franchisor’s name; tariff liberalization is allowing the lower-cost export of key equipment required to supply the franchisee; and the elimination of “dealer acts” will allow U.S. companies to terminate a contract with a franchisee for just cause.

Franchisors interested in the Guatemala market are advised to register their trademarks before they enter the market. Trademarks, trade names, copyrights, etc. should be registered directly by the U.S. company, with the assistance of a Guatemalan attorney.

Formal agreements should be reviewed by a Guatemalan attorney hired by the U.S. company (independent of the Guatemalan party with which the agreement is being established). The agreement should clearly state the terms of the relationship.

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Best prospects in this service are: fast food, which is number one; convenience services: dry cleaning, gyms, lawn and garden, professional painters, fast shoe repair, cosmetics, casual clothing, pest control, day-care/learning centers, computer centers, security, advertising, real estate, auto repair and shops, discount stores, fitness centers and convenience store/pharmacies.

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Interested Guatemalan investors who wish to open a franchise are often young professionals, who are familiar with U.S. business practices and who seek to break away from their family businesses and start something on their own. These investors look for a franchisor with a worldwide presence, which is new to Guatemala but enjoys solid acceptance in other markets, is honorable and reputable, and provides extensive training and backup. People who currently own a franchise also tend to be more open toward investing in a new one.

Foreign franchises make up 90 percent of the total franchise market in Guatemala, with domestic franchises accounting for 10 percent. Among the 90 percent foreign franchises, the U.S. is the leader with 85 percent of the market share and the other 5 percent are from Mexico and other countries including from Europe and Guatemala itself.

The best and most effective way to enter the Guatemalan market is through one of the Department of Commerce' services, such as the Gold Key Service, which is designed to give U.S. companies the advantage of local expertise to schedule meetings with pre-screened potential business contacts. In order to obtain the best results, this service will include an ad or two in the most read newspapers.

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- International Franchise Association: www.franchise.org
- International Franchise Expo: www.franchiseexpo.com
- Guatemalan Franchise Association: www.guatefranquicias.com
- U.S. Commercial Service Central America: www.buyusa.gov/centralamerica/en
- U.S. Commercial Service in Guatemala: www.buyusa.gov/guatemala

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Computers and Peripherals

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Imports and Exports of Computer and Peripherals
In Thousands of USD

		IMPORTS			EXPORTS		
		2004	2005 *(P)*	2006 *(P)*	2004	2005 *(P)*	2006 *(P)*
HS Code	**Description**	**Value**	**Value**	**Value**	**Value**	**Value**	**Value**
847110	analog or hybrid automatic data processing machines	3,939	4,915	6,808	100	170	134
847130	portable digital automatic data processing machines, weight not more than 10 Kg, consisting of at least a central processing unit, keyboard & display	18,556	24,910	40,884	162	792	1,191
847141	digital ADP machines comprising in same housing at least a central processing unit & an input and output unit, whther or not combined	1,724	1,430	1,857	101	21	22
847149	digital automatic data processing machines and units thereof presented in the form of systems	8,965	19,620	29,623	412	160	243
847150	digital processing units other than those of 8471.41 and 8471.49	13,883	16,451	20,364	723	559	408
847160	automatic data processing input or output units, whether or not containing storage units in the same housing	32,016	33,926	38,697	519	518	515
847170	automatic data processing storage units	5,663	7,746	10,516	19	107	18
847180	automatic data processing units	4,147	4,718	4,486	103	91	107
847190	automatic data processing units theereof; magnetic/optical readers, mach for transcribing data to data media in coded form & mach for proc. Data	4,614	4,577	7,006	76	25	46
847330	parts and accessories for automatic data processing machines and units thereof, magnetic or optical readers, transcribing machines, etc.	29,867	34,448	45,029	805	790	1,035
	TOTAL	**123,374**	**152,741**	**205,269**	**3,021**	**3,232**	**3,718**

Source: SIECA
(P) Preliminary

There is no local manufacturing of computers and peripherals in Guatemala and all equipment is imported, mainly from the United States. The sector is comprised of five major authorized wholesalers and approximately 400-500 retail and small distributors' stores nationwide; most of them have an open account with the major wholesalers but are free to purchase directly from abroad. The wholesalers distribute major brands and are in advantage over the small distributors when bidding for government tenders and large corporations. The computer and peripheral market in Guatemala is price driven.

"Clone" computers are very popular due to their low price (one third of the price of a brand name computer). This segment accounts for 60 percent of the market share. "Clones" are assembled locally from imported parts primarily from Aisa and sold to private individuals who demand a low cost computer with post-sale maintenance service. The remaining 40 percent of the share belongs to large importers of OEM products such as IBM, Compaq, Dell and Hewlett Packard.

Import taxes for most computer and peripherals range between 0-3 percent. At present, the Industry is strongly pushing for the Government to reconsider the 15 percent import tax for inks –which make cartridges very expensive for the end user- and digital cameras and videos, which pay 10 percent import taxes. Expenditures on hardware have historically outpaced those for packaged software or services and that trend is expected to continue.

Best Products/Services

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The most promising sub-sectors for U.S. products within the industry include:
-Motherboards, micro-processors, hard drives, CD-R/RW units, DVD units, RAM, Notebooks.

Due to continuous price changes in these high-tech products, distributors prefer to have a short delivery time supplier in the U.S. This supplier is expected to have merchandise in stock and deliver promptly.

Other promising subsectors are the following:
Keyboards, mouse, cases, monitors, color printers, scanners, multimedia accessories, floppy, CD-Rom, network cards.

Asia is aggressively entering the market in these sub sectors. Local distributors can manage to have volume stock of these products due to their price stability and slower technology changing rate.

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Brand name computers are mainly purchased in Guatemala by the national government, the financial sector, hospitals, universities, schools and large corporations. It is important to be aware of national public tenders available on line at the official tender and bidding site of "Guatecompras" (www.guatecompras.gt). Smaller distributors are a good niche market when offering high-tech equipment at competitive prices and for used equipment.

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- US Commercial Service in Guatemala: www.buyusa.gov/guatemala
- Official website for Government Tenders: www.guatecompras.gt
- Guatemalan Chamber of Industry: www.industriaguate.com
- "Gremial de Informatica" (an association within the Chamber of Industry that gathers all authorized distributors): Tel. 502- 2331 9191 ext 150
- Tax information: www.sat.gob.gt
- Statistical information: www.sieca.org.gt

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Apparel: Textile Machinery and Supplies

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U.S. Exports to and Imports from Guatemala
Textile and Apparel Products
In Thousands of USD

	2004		2005		2006		thru Sept. 2006		thru Sept. 2007	
	exp.	imp.	exp.	imp.	exp.	imp.	exp.	imp.	exp.	imp.
FABRICS	229,853	1,927	182,744	3,138	117,023	3,990	92,416	2,717	89,100	3,312
FIBERS, YARNS & THREADS	65,677	45	68,862	139	60,996	181	45,927	151	47,733	167
FINISHED & COATED TEXTILE FABRICS	21,774	0	38,489	39	58,875	0	42,791	0	38,192	0
OTHER TEXTILE PRODUCTS	6,947	4,077	3,829	4,034	11,899	4,314	9,365	2,820	15,294	4,449
TEXTILE FURNISHINGS	3,248	7,591	3,764	8,053	4,451	4,190	3,153	3,376	3,331	2,530
APPAREL	39,195	1,932,110	32,680	1,801,912	21,792	1,657,182	18,092	1,265,400	7,183	1,109,742
APPAREL ACCESSORIES	23,215	16,524	16,874	16,129	17,038	22,795	10,985	16,432	25,392	12,422
KNIT APPAREL	6,673	9,840	5,211	9,917	6,137	5,286	5,149	3,658	5,306	1,119

(Source: Department of Commerce)

The textile and apparel sector is one of the most important ones to the Guatemalan economy (it accounts for 103,473 jobs) and is among the leading export sectors (around 30 percent of the nontraditional exports). There are 184 apparel or "maquila" factories with a combined installed capacity of 66,088 sewing machines. Also, there are 50 textile mills and 260 accessories and services companies. Most foreign investment in sewing comes from Korea (113 companies) followed by Guatemala (57 companies), the United States (12 companies), Singapore, and France (each one with 1 company); of those factories more than 85 percent of them are clustered in the larger metropolitan area around Guatemala City.

Historically the Guatemalan and the U.S. textile and apparel sectors have had an important and special commercial relationship. During the 1990's, the Caribbean Basin Initiative (CBI) later known as the Caribbean Basin Trade Partnership (CBTPA), effectively made the United States the primary supplier of textiles to Central America, while at the same time making the United States the prime target of the region's apparel exports. In fact, those agreements fostered the relationship by granting preferential access to apparel manufactured goods from the region that sourced their material in the U.S. This has been furthered enhanced by the implementation of the CAFTA-DR free trade agreement, which cemented the benefits that the countries' products receive when entering the U.S. once they've met the norms of origins established in the treaty (Chapter 3, section G of the Treaty outlines the rules under which the parties will be able to commercialize textile and apparel products in order to be granted duty-free and quota-free market access). As a result, Guatemala has steadily been among the top 25 suppliers of apparel to the U.S. for the past 5 years; CAFTA-DR countries represented approximately 15 percent of the U.S. imports in 2007.

Guatemala exports 88.35 percent of its apparel production to the U.S., 7.84 percent to the rest of the Central American countries, 2.31 percent to Mexico, and 0.35 percent to the Canada. Broken down by fabric, Guatemala exports 73.82 percent of knitted and 26.18 percent of woven fabric. In fact, cotton knit shirts represent 71.25 percent of all apparel exports to the U.S., followed by cotton trousers and shorts (8.86 percent), manmade fiber trousers (6.99 percent), manmade fiber knits shirts (4.17 percent), and hosiery (3.33 percent). With regards to textiles, Guatemala manufactures 135 million pounds per year. Nevertheless, availability of textiles and fabric is a major challenge for apparel manufacturers and thus, Central America has become the primary destination for U.S. exports of yarns and fabric (around 25 percent of U.S. fabric exports and 40 percent of U.S. yarn exports – Malone & Ramey, 2005). There is a decrease in the export statistics for Guatemala that is partially explained by the staggered implementation of CAFTA-DR for all the countries. For part of 2006-2007 Guatemala was unable to export textile or apparel products under preferential treatment.

According to the Guatemalan Apparel and Textile Industry Commission (VESTEX), Guatemala's geographical position and proximity to the United States gives the industry a competitive advantage. In the last couple of years the industry has been transitioning from selling productivity to selling "the complete package", which includes supplying services and basic designs. Currently, there are many businesses operating under this format. This represents an important change for the Guatemalan industry, since it has just begun to compete as an integrated industry.

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Countries in Central America have historically strongly preferred U.S. fabrics and textile machinery, fostered by preferential treatment under the Caribbean Basin Initiative and the establishment of Free Trade Zones.

U.S. imports (machinery) have held a dominant position throughout the past decade, with some competition from Taiwan, Germany, Mexico and others. For instance:

- The U.S. has a 70 percent market share for machines for extruding, drawing, texturing or cutting man-made textile materials, followed by Taiwan with 20 percent;
- U.S. imports account for 36 percent share of imports of knitting machines, with Italy in second place at 19 percent.
- Germany leads in the imports of machines used in the preparation of textile fibers, controlling a 45 percent market share, followed by US with 18 percent.

Textile Yarn and Fabric: Central American import statistics for 2003 also confirm the U.S. as the leading exporter in:

- Knitted or crocheted fabrics: The U.S. controlled 48 percent of imports to the region;
- Special woven fabrics, tufted textile fabrics, lace, tapestries, trimmings, and embroidery. The U.S. controlled this market with a 77 percent market share.

The following is a list of the most promising sub-sector categories within the industry for 2008:

-Spinning machines;
-Sewing machines;
-Trims;
-Drying machines;
-Bleaching or dyeing machines;
-Zippers;
-Buttons;
-Yarn;
-Fabric;
-Boxes;
-Accessories.

Opportunities

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Fabric produced in the Central American countries does not meet demand in the region and often lacks diversity and quantity. Under CAFTA-DR, fabric imported from the U.S. and incorporated in the apparel production receive duty-free treatment for exports to the U.S.; material imported for retail sale in Central America will also be treated as duty free, which will give it a clear advantage over European competitors.

Resources

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- Commercial Office in Guatemala: www.buyusa.gov/Guatemala/
- Apparel and Textile Industry –VESTEX-: www.apparel.com.gt
- Secretariat for Central American Economic Integration: www.sieca.org.gt
- Guatemalan Central Bank: www.banguat.gob.gt
- Guatemalan Ministry of Economy: www.mineco.gob.gt
- International Trade Administration: www.ita.doc.gov/CAFTA/
- INCAE Business School:
  http://www.incae.ac.cr/ES/clacds/investigacion/pdf/cen1605.pdf

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Medical Equipment

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EXPORT MARKET SIZE
Thousands of USD

	2005	2006	2007 (e)
IMPORTS	32,657	38,025	43,729
EXPORTS	1,648	1,301	1,301
IMPORTS FROM U.S.	18,620	20,114	22,125
Source: SIECA			

The market for medical products in Guatemala is divided into two segments, the private and public sectors. There are eight major medical products distributors and more than 50 small distributors operating locally. The private sector, mostly purchases American products due to their appreciation of high quality products. The government, on the other hand, is price driven and will purchase from the lowest bid. The complete public bidding process can be accessed at www.guatecompras.gob.gt - Concursos Publicados. In order to be eligible for this bidding process, American firms must have a local office, agent or distributor, and must consider that most products require local sanitary registration. This registration process takes approximately two months and has a four hundred dollar cost per product. (This price is approximate). Many American firms find distributors in Guatemala who will manage their official registrations and participate in the national bidding process on their behalf. Private sector will purchase refurbished equipment sometimes, however the Public Sector may not, unless they purchase products from a distributor through a leasing agreement.

There are no import restrictions for new or used medical equipment to Guatemala. Import taxes in the region vary: from 0-15 percent import duties (applied against CIF value); and 12 percent value added tax.

Guatemala imports most of it's market needs for medical equipment and devices. Local production consists of clinic and hospital furniture, simple disposables and reagents. U.S. brands are well recognized in the Country, thus in the past three years, the United States has been the supplier of over 50 percentof local imports for the medical industry. The tendency is for the U.S. to continue to be the major shareholder of the imports market, especially in apparatus, instruments and specialized devices. Other players such as Mexico, Asian countries and Brazil are gaining territory in devices that need less technology or specialization. For example, in the past two years, Mexico and China have gained tremendous market share for exports under Chapter 40 (rubber gloves, etc). The countries that share the other 50 percent of the market with U.S. are Germany, Japan, Switzerland, Brasil and China.

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Replacement of obsolete equipment and infrastructure expansion projected for hospitals and small rural clinics will increase imports of medical equipment in the region.

Best prospects for U.S. companies are for the following products:

- Diagnostic imaging equipment, surgery tables, cardiac monitors, x-ray equipment, respiratory ventilators, ceiling lamps, ultrasonic scanning equipment, and magnetic resonance imaging apparatus

Other opportunities within the industry lie in the following disposable medical devices:

- Gloves (sterile and non sterile), bandages, plastic bandages, immobilization products, all type of sounds, catheters, medical and surgical apparel, corrugated tubes, universal tubes, syringes and any disposables needed for hospitals and home care

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It is important to be aware of National Procurements available on line at the "Guatecompras" site. The largest bids are published in October and finally negotiated in January. Distributors are a market to pursue. There are eight to ten large distributors and importers in the country and many small ones willing to broaden their line of products by importing high quality and price competitive devices.

Resources [Return to top]

- US Commercial Service in Guatemala www.buyusa.gov/guatemala
- Official website for Government Tenders www.guatecompras.gt
- Guatemalan Chamber of Industry www.industriaguate.com
- Statistical information www.sieca.org.gt
- Ministry of Health www.mspas.gob.gt

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Electric Power Systems

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Guatemala: Imports of Electrical Power Systems
In Thousands of USD

	2004	2005	2006(p)
Total imports	73,405.60	97,036.75	107,055.49
U.S. imports	34,632.38	44,469.10	57,427.41
U.S percentage of total imports	47.18	45.83	53.64

(p) Preliminary
Source: SIECA

Guatemala's electric subsector has changed significantly in the past two decades. In the 1980's, 50 percent of all generation came from hydroelectric power and the state owned company INDE was the main source of energy. In 1996, a law was enacted that opened the market for new private investment and privatized the commercialization of energy. Generation shifted overtime and now Guatemala's electricity is 55 percent thermal, 33 percent hydro, 3 percent geothermal, and 9 percent cogeneration.

The energy subsector in Guatemala is comprised of the Ministry of Energy and Mines (MEM), the "*Comision Nacional de Energia*" or National Energy Commission (CNE), the "*Mercado Mayorista*" or wholesale and spot market coordinator, the state owned company INDE (owns the major hydroelectric plants and most of the distribution lines), an excess of 20 privately owned generation companies, and three commercialization companies. The MEM forms policy and the CNE sets regulations.

In 2007 the Guatemalan government made official the latest reforms to the energy sector by publishing the *Acuerdo Gubernativo 68-2007* (reforms the General Electricity Law) and the *Acuerdo Gubernativo 69-2007* (reforms to the rules of the Administrator of the Wholesale Market) in the *Diario de Centroamerica* (Guatemala's official gazette) on March 1, 2007. Overall, analysts believe that the lowering of barriers will lead to new entrants to the market, more competition, new investment, and better coverage and quality of service. Furthermore, it is hoped that the new scheme will reverse Guatemala's dependence on fossil fuels by allowing small renewable energy projects.

Starting in the late 1990's there has been a push in the Mesoamerican region towards integration, regional development and regional infrastructure. The centerpiece of this effort is the Plan Puebla-Panama, an initiative to bring sustainable development to the southern part of Mexico, Belize and the Central American countries (Guatemala, El Salvador, Honduras, Nicaragua, Costa Rica and Panama).

The Central American Electrical Interconnection System Project (Proyecto del Sistema de Interconexion Electrica de los Paises de America Central –CIEPAC-) is one of the components of the Plan Puebla-Panama, with the objective the establishment of a wholesale electricity market and the development of the first regional transmission system. The power transmission line would have a length of 1,830 kilometers and a capacity to transport 230 megawatts of power. The entire project has an estimated cost of USD 320 million, for which the Interamerican Development Bank (IDB) has already approved a USD 170 million loan. Among other things, the project will require the construction of substations and transmission towers. When completed, intra-regional electricity annual sales will be around USD 200 million.

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The following is a list of the most promising sub-sector categories within the industry for the next year:

-Electrical power generators
-Transformers
-Hydraulic turbines
-Circuit breakers
-Switchgears
-Conducting cable
-Parts of steam and other turbines

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In his inauguration speech on January 14, 2008, President Colom presaged the possibility of energy rationings in the future if demand keeps growing and there are no new investments. As a short-term solution the Ministry of Energy and Mines would like to speed the implementation of the Mexico-Guatemala interconnection project with a total cost of USD 55.8 million. As a long-term solution, the government would like to exploit the country's renewable energy potential through environmentally responsible investment. It is expected that for the short term transmission lines and sub-stations for interconnection and renewable energy projects provide the best opportunities within the sector.

Resources Return to top

- Ministry of Energy and Mines: www.mem.gob.gt
- National Electrical Energy Commission: www.cnee.gob.gt
- Transaction Management Institution: www.amm.org.gt
- Commercial Office in Guatemala: www.buyusa.gov/guatemala

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Agricultural Sectors

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Apples

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Tariff Code 080810	***Value (in million $)***		
	2005	*2006*	*2007*
Total Market Size	8.5	11.9	13.2
Total Local Production	0.5	0.5	0.5
Total Exports	0.5	0.4	0.5
Total Imports	8.0	11.5	12.7
Imports from the U.S.	4.5	6.0	8.2

Guatemalan apple imports from the U.S. have grown steadily over the past five years, under CAFTA-DR, U.S. apples now enter quota and duty-free. U.S. apples are now competitive with those from Chile, which had up to 85 percent of the import market. By 2006, U.S. apples captured 59 percent of the Guatemalan market. Imports from U.S. in 2006 were 36 percent above those in 2005. Apple distributors are very aggressive in their marketing strategies, making the product available in supermarkets and open-air markets most of the year. Apple importers have to pay an additional USD 0.12 (about USD 0.01) per pound of imported apples, which is given to the local grower's cooperative.

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The most popular imported varieties include Red Delicious, Golden Delicious, Fuji, and Gala.

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Most U.S. Cooperators combine Guatemala, El Salvador, Honduras and Costa Rica into one marketing region because all share cultural similarities, speak Spanish and have the same peak sales periods. Therefore, all are serviced by only two or three importer/buyer groups. Importers of every country have strong relationships with each other, and commercial interchanges and negotiations take place on a daily basis. Note: Cooperators are U.S. agricultural commodity export associations which work in conjunction with USDA/FAS.

Resources

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- U.S. Department of Agriculture (USDA)
  Foreign Agricultural Service in Guatemala: www.fas.usda.gov
- Exporter Guide 2007: www.fas.usda.gov/scriptsw/attacherep/defaults.asp.
- FAIRS Report 2007: www.fas.usda.gov/scriptsw/attacherep/default.asp
- Statistical information: www.sieca.org.gt

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Rice

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Tariff Code 100610	*Value (in million USD)*		
	2005	*2006*	*2007*
Total Market Size	99.3	120.1	167.7
Total Local Production	10.5	9.0	8.5
Total Exports	12.3	16.4	17.0
Total Imports	88.8	111.1	159.2
Imports from the U.S.	68.3	92.6	122.5

Rice imports have been increasing in the last few years in response to the growth of marketing programs and activities of the Guatemalan Rice Association and the U.S. Rice Federation. All the rice marketed in Guatemala is a blend of U.S. and Guatemalan rice. The rice that it is imported into Guatemala is rough rice and is fortified in country. Under CAFTA-DR, rough rice is under a TRQ which for year 2008 will be 59,000 metric tons, an increase of 4 percent per year at 0 percent tariff. Out of quota tariff is fixed at 29.2 percent until 2015.

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The rice that is mainly imported is rough rice. Guatemala exports rice to El Salvador and Honduras.

Opportunities

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The marketing strategy that has been implemented in Guatemala with the support from U.S. Cooperators has been targeted to the middle and lower class consumers. Guatemala is one of the countries with the lowest per capita consumption of rice in the region; therefore, there are ample opportunities to increase the demand for a 13 million population country.

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- U.S. Department of Agriculture
  Foreign Agricultural Service in Guatemala: www.fas.usda.gov
- Exporter Guide 2007: www.fas.usda.gov/scriptsw/attacherep/defaults.asp.
- FAIRS Report 2007: www.fas.usda.gov/scriptsw/attacherep/default.asp
- Statistical information: www.sieca.org.gt

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Poultry

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Tariff Code 0207	*Value (in million $)*		
	2005	*2006*	*2007*
Total Market Size	205.4	204.1	217.4
Total Local Production	163.5	165.0	166.5
Total Exports	7.9	8.0	5.4
Total Imports	47.4	39.1	45.5
Imports from the U.S.	44.9	37.0	42.1

Guatemala is a major importer of U.S. meat and poultry. It imposes few import restrictions on poultry, and imports large amounts of U.S. brand-name frozen chicken cuts. Under CAFTA-DR, tariffs are being phased out immediately, in 5 years, or in 10 years, depending on the product. The exception is chicken leg quarters (CLQ), which enter under a TRQ and have an out of quota duty of up to 164 percent. However, bowing to domestic pressure, Guatemala set the out of quota duty in 2006 at only 15 percent, in contrast to the other CAFTA-DR countries which set the CLQ tariff at the maximum allowed. CLQ is an inexpensive, popular meat, and the domestic industry cannot meet demand.

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There are opportunities for the high value products that will benefit from the drop in duties from 15 percent to 0 percent under CAFTA-DR, as well as other frozen products besides chicken leg quarters.

Opportunities

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Other value-added products such as nuggets, sausages and chicken patties have good opportunities in Guatemala. While these products are already available in supermarkets and are increasing in popularity with consumers, they still offer good potential. U.S. poultry products are very competitive in price terms.

Resources

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- U.S. Department of Agriculture
  Foreign Agricultural Service in Guatemala: www.fas.usda.gov
- Exporter Guide 2007: www.fas.usda.gov/scriptsw/attacherep/defaults.asp.
- FAIRS Report 2007: www.fas.usda.gov/scriptsw/attacherep/default.asp
- Statistical information: www.sieca.org.gt

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Red Meats

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Tariff Code 020-0207	*Value (in million USD)*		
	2005	*2006*	*2007*
Total Market Size	150.1	150.5	152.9
Total Local Production	130.3	130.3	130.5
Total Exports	0.0	0.0	6.9
Total Imports	19.8	17.8	22.4
Imports from the U.S.	11.6	10.1	12.7

Guatemala used to be a large meat exporter, but production has declined and imports have become an important source of meat for hotels, restaurants, and higher-class consumers. In 2007, Guatemala began exporting meat to other Central American countries. It is estimated that with the opening of a new slaughterhouse in the Peten area, exports will increase and it is expected that Guatemala could comply with U.S. standards in order to export meat to the United States in the near future. Local production is of irregular quality and supply, which is a problem for hotels and fine restaurants, which need a consistent supply of high-quality beef. More and more, hotels and restaurants are advertising imported U.S. meats in their menus. Under CAFTA-DR pork meat TRQ is 4,543 MT (the highest TRQ for the Central American region.) In the spring of 2004 Guatemala reopened its market for all beef and products after it had been shut in December 2003 due to the discover of cattle imported into the U.S. from Canada afflicted with BSE (mad cow disease"). Prime and choice beef cuts enjoy immediate duty-free access.

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The most commonly exported beef product from the U.S. is frozen bone-in and boneless 50 percent trimmings, which makes up approximately 60 percent of total U.S. exports to the region. The other 40 percent of U.S. products shipped to the region is made up of a variety of high quality cuts for the HRI sector and variety meats distributed through supermarkets and wet markets. There are many meat and deli-meat processors in Guatemala that are looking at exporting to the U.S. once Guatemala gets approval complying with U.S. standards.

Opportunities

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In Guatemala, the tourism sector is growing and seeks to satisfy visitor demand for high quality, wholesome food by using U.S. beef and pork.

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- U.S. Department of Agriculture in Guatemala: www.fas.usda.gov
- Exporter Guide 2007: www.fas.usda.gov/scriptsw/attacherep/defaults.asp.
- FAIRS Report 2007: www.fas.usda.gov/scriptsw/attacherep/default.asp
- Statistical information: www.sieca.org.gt

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Grapes

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Tariff Code 080610	***Value (in million $)***		
	2005	*2006*	*2007*
Total Market Size	8.2	10.6	11.7
Total Local Production	0.0	0.0	0.0
Total Exports	0.0	0.0	0.0
Total Imports	8.2	10.6	11.7
Imports from the U.S.	5.7	8.1	8.9

Guatemala is the largest market for grapes in Central America. Consumers now consume grapes year-round because of alternating supply by the U.S. and Chile. Consumption levels of grapes are higher during the Christmas season. By 2006, the U.S. supplied Guatemala with 74 percent of its grapes, followed by Chile with 26 percent.

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The most popular varieties imported into the country are Autumn Royal, Red Globe and Thompson seedless grapes. U.S. exports of grapes continue to have great growth potential in the Guatemalan market.

Opportunities

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Approximately 60 percent of fresh grapes are sold via the supermarket sector and 40 percent in wet markets from October through January. From February to September, 70 percent is handled by supermarkets and 30 percent by street vendors. Guatemalans are increasingly concerned about health issues and prefer to give to their children fruits and vegetables as snacks rather than ready-to-eat products. This will increase the percentage of retailers who consider it profitable to handle numerous varieties of grapes.

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- U.S. Department of Agriculture
  Foreign Agricultural Service in Guatemala: www.fas.usda.gov
- Exporter Guide 2007: www.fas.usda.gov/scriptsw/attacherep/defaults.asp.
- FAIRS Report 2007: www.fas.usda.gov/scriptsw/attacherep/default.asp
- Statistical information: www.sieca.org.gt

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Wheat

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Tariff Code 100	*Value (in million $)*		
	2005	*2006*	*2007*
Total Market Size	97.1	125.5	127.7
Total Local Production	0.0	0.0	0.0
Total Exports	0.0	0.0	0.0
Total Imports	97.1	125.5	127.7
Imports from the U.S.	55.1	125.5	127.7

Guatemala is a net importer of wheat. In 2006, imports from the U.S. captured the market, doubling sales to Guatemala. Canada was the main competitor for the U.S. but has been completely replaced by U.S. wheat.

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The baking industry in Guatemala has been growing in the past five years. New bakeries of two well known Guatemalan franchises are opening in the city and in growing cities in the interior of the country.

Opportunities

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Even though wheat prices for the past year have risen considerably, Guatemala is still very dependent on imported wheat as there is very limited local production. The U.S. is the main supplier.

Resources

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- U.S. Department of Agriculture
  Foreign Agricultural Service in Guatemala: www.fas.usda.gov
- Exporter Guide 2007: www.fas.usda.gov/scriptsw/attacherep/defaults.asp.
- FAIRS Report 2007: www.fas.usda.gov/scriptsw/attacherep/default.asp
- Statistical information: www.sieca.org.gt

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Wines

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Tariff Code 2204	***Value (in million $)***		
	2005	*2006*	*2007*
Total Market Size	4.7	5.9	7.6
Total Local Production	0.3	0.4	0.4
Total Exports	0.3	0.4	0.4
Total Imports	4.4	5.5	7.2
Imports from the U.S.	0.3	0.4	0.5

In Guatemala, 40 percent of the imported wine comes from Chile and 23 percent from Spain. The U.S. holds roughly 7 percent of the market due to price considerations as Chilean wines are less expensive. With CAFTA-DR implementation, U.S. wine enjoys immediate duty-free access, which makes it more price competitive (considering its tariff used to be 40 percent.)

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Guatemala holds a wine festival every year in November. In the 2007 show visitors were very positive about California wines that were promoted through local distributors.

Opportunities

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Guatemalans are starting to become wine consumers as many deli stores are introducing new brands and are marketing wines as healthy and sophisticated drinks.

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- U.S. Department of Agriculture
  Foreign Agricultural Service in Guatemala: www.fas.usda.gov
- Exporter Guide 2007: www.fas.usda.gov/scriptsw/attacherep/defaults.asp.
- FAIRS Report 2007: www.fas.usda.gov/scriptsw/attacherep/default.asp
- Statistical information: www.sieca.org.gt

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Soybean Oil

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Tariff Code 1507	*Value (in million $)*		
	2005	*2006*	*2007*
Total Market Size	16.0	18.0	22.6
Total Local Production	0.0	0.0	0.0
Total Exports	1.6	2.6	5.0
Total Imports	16.0	18.0	22.6
Imports from the U.S.	15.8	9.9	21.5

Soybean oil imports declined during 2006, as palm oil substituted for soybean oil in the food processing industry. In 2007, the demand for palm oil as a biofuel shifted the trend in the food processing industry, as soybean oil became a more profitable raw material for production purposes.

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Guatemala imports mostly crude soybean oil for the food processing industry. Local oil producers also refine the crude oil for the local market and sell the final product with a local brand that it is also exported to other Central American countries. The new increased demand for biofuels reinforces the trend to increase the use of soybean oil in food processing. Imports of soybean oil from the U.S. doubled in 2007 while other suppliers had between 20 – 30 percent increases in exports to Guatemala.

Opportunities

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The U.S. regained the market share in Guatemala that it lost in 2006. If prices continue to be competitive compared to those from Argentina, the U.S. could become Guatemala's main supplier of soybean oil. With the implementation of CAFTA-DR, the food processing industry in Guatemala is exporting snacks to the United States for the nostalgic market of almost 1.5 million Guatemalans. Since soybean oil is an important ingredient in the production process, this could lead to increased opportunity for the U.S. soybean oil producers.

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- U.S. Department of Agriculture
  Foreign Agricultural Service in Guatemala: www.fas.usda.gov
- Exporter Guide 2007: www.fas.usda.gov/scriptsw/attacherep/defaults.asp.
- FAIRS Report 2007: www.fas.usda.gov/scriptsw/attacherep/default.asp
- Statistical information: www.sieca.org.gt

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U.S. exporters seeking general export information/assistance or country-specific commercial information should consult with their nearest **Export Assistance Center** or the **U.S. Department of Commerce's Trade Information Center** at **(800) USA-TRADE**, or go to the following website: http://www.export.gov.

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