United States Department of Agriculture
Foreign Agricultural Service

GAIN
Global Agricultural Information Network

Voluntary Report – Voluntary - Public Distribution

Date: December 19, 2025

Report Number: GT2025-0018

Report Name: Guatemala's Processed Vegetable Industry - Opportunities for Growth

Country: Guatemala

Post: Guatemala City

Report Category: Market Development Reports, Promotion Opportunities, Vegetables, Tomatoes and Products, Potatoes and Potato Products

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Report Highlights:

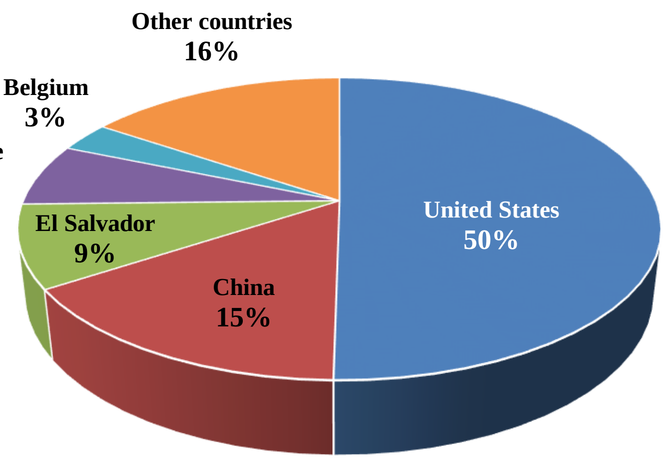
The hotel, restaurant, and catering industry in Guatemala is experiencing significant growth, fueled by rising tourism and an expanding dining-out culture. This growth creates a promising opportunity to enhance the commercialization of processed vegetables, including frozen, canned, and dehydrated options. In 2024, Guatemala imported $193 million worth of processed vegetables, with the United States accounting for 50 percent of the market. There is considerable potential to introduce premium or differentiated products, such as organic, seasoned, or specialty-cut frozen vegetables, to meet the demands of niche markets and capitalize on evolving consumer preferences.

1. Market Overview

The market for processed vegetable imports in Guatemala is shaped by evolving consumer demand, trade dynamics, and the growth of the foodservice and retail sectors. This category includes frozen, canned, dehydrated, and glass-packaged products, which are gaining popularity due to their convenience, extended shelf life, and ease of preparation. Urban households and working professionals represent key consumer segments. Additionally, the expansion of the HORECA (Hotels, Restaurants, and Catering) industry has significantly increased demand for processed vegetables, which are frequently used as ingredients in meals or served as side dishes.

While Guatemala boasts a robust agricultural sector, its capacity for processing vegetables remains limited compared to its production of fresh produce. The country is primarily recognized for exporting fresh vegetables rather than processed ones. As a result, Guatemala relies heavily on imports to meet domestic demand for processed vegetables. In 2024, the country imported $193 million worth of processed vegetables, with the United States leading as the primary supplier ($97 million), followed by China ($30 million), El Salvador ($17 million), Chile ($13 million), and Belgium ($6 million). The largest imported product categories include frozen potatoes (primarily French fries), canned vegetables and pulses (such as tomatoes, beans, and corn), as well as frozen and dried vegetables (excluding potatoes). These imports reflect both the growing consumer preference for convenience and the needs of Guatemala's expanding foodservice industry.

Market Share of Processed Vegetable Imports from the World (2024)



Source: Trade Data Monitor

Guatemala relies heavily on imports to satisfy domestic demand for processed vegetables. The key product categories include:

Frozen Vegetables: Valued for their freshness, convenience, and ease of preparation, popular imports include potatoes, peas, carrots, broccoli, and mixed vegetable blends.

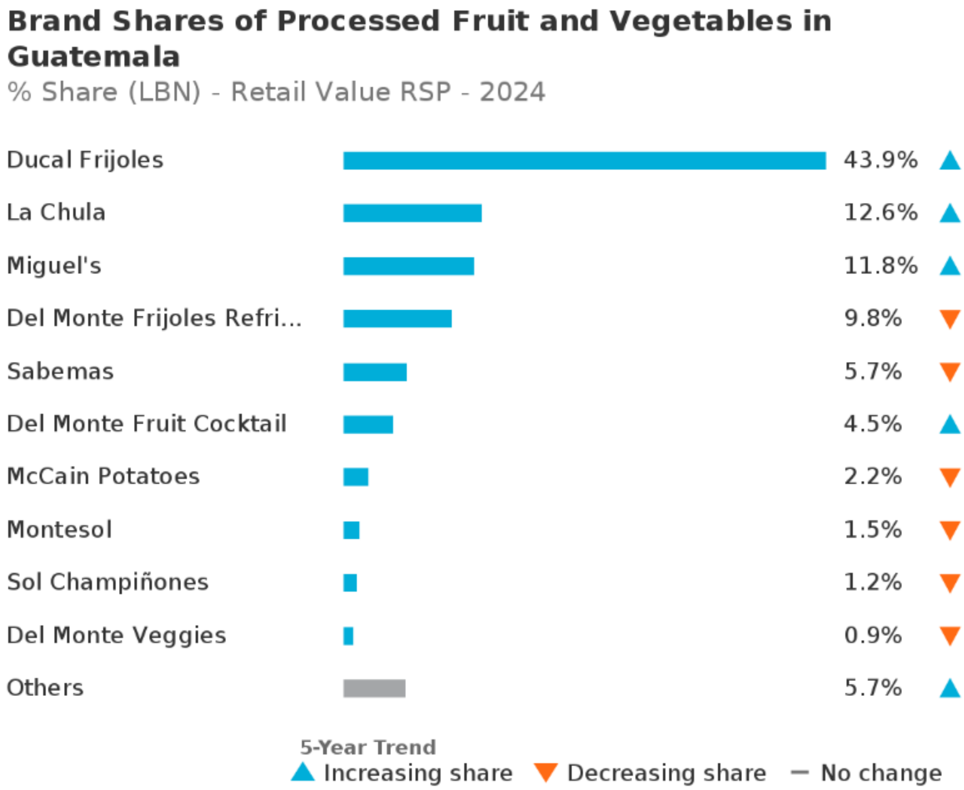
Canned Vegetables: Frequently imported items in this category include tomatoes, beans, corn, and mushrooms, which are staples in both household and food service use.

Dehydrated Vegetables: Common imports include dried onions, garlic, peppers, and mixed vegetable blends, which are favored for their long shelf life and versatility in cooking.

Glass-Packaged Processed Vegetables: Often associated with premium quality, these products are appreciated for their ability to preserve freshness and their environmentally friendly appeal.

These categories reflect Guatemala’s growing demand for convenient, high-quality processed vegetables across both retail and foodservice sectors.

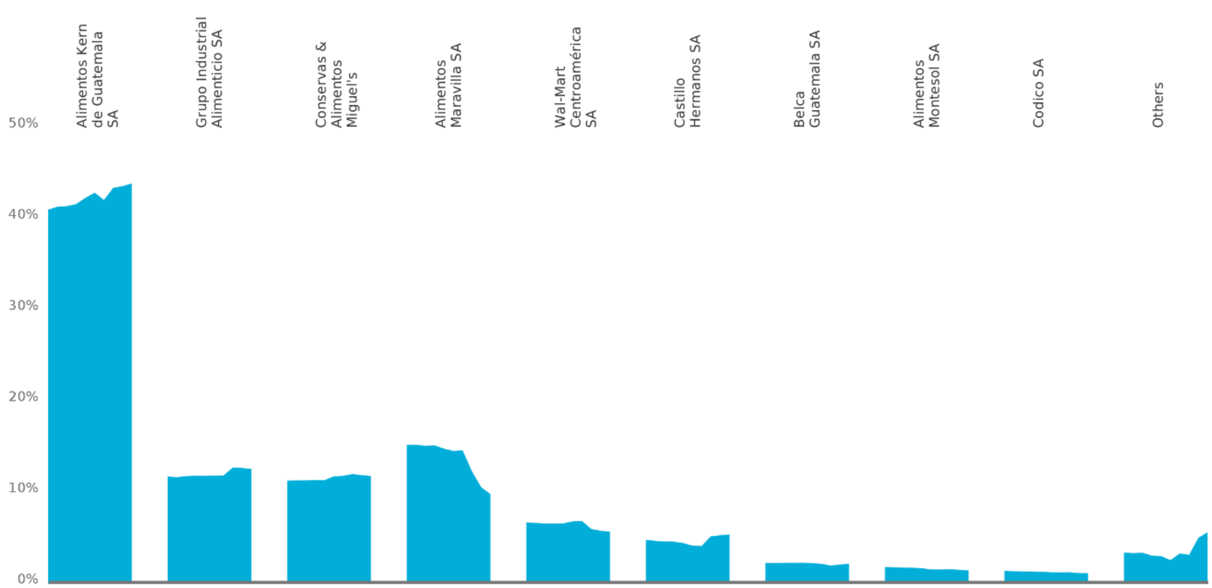
2. Processed Fruits and Vegetables Market in Figures



Source: Euromonitor

Company Share Performance in Processed Fruits and Vegetables in Guatemala

% Share (NBO) – Retail Value RSP – 2015-2024



Source: Euromonitor

3. Consumption

Frozen vegetables

Frozen vegetables are less commonly consumed in Guatemala compared to fresh produce, largely due to the year-round availability of fresh vegetables supported by favorable agricultural conditions and local farming practices. However, French fries stand out as an exception, having become a popular food item, particularly among younger demographics and urban populations.

French fries are widely consumed in fast-food chains, casual dining restaurants, and households, where they are appreciated as a convenient snack or side dish. The expansion of fast-food chains, casual dining establishments, and the catering sector has significantly driven demand for imported French fries.

These sectors often favor pre-cut, frozen varieties for their convenience, consistency, and ease of preparation. Additionally, increasing urbanization and busier lifestyles have contributed to a growing preference for ready-to-cook or ready-to-eat food products, including frozen French fries.

Guatemala imports a substantial portion of its French fries, primarily frozen varieties, with the United States serving as the leading supplier. This dominance is attributed to proximity, established trade relationships, and the high-quality standards of U.S. potato products. Guatemala is the largest market in Central America for U.S. potato products by both value and tonnage. According to Potatoes USA, during marketing year (MY) 2023/2024, Guatemala imported 42,490 metric tons (MT) of U.S. frozen potato products, valued at $79.4 million, a 7 percent increase in volume and a 14 percent increase in value compared to the previous year. Of this total, frozen potato products accounted for 33,591 MT, worth $79.3 million.

Potatoes USA continues to promote U.S. potato products in Guatemala through targeted initiatives such as origin-focused campaigns, technical training, cooking demonstrations, and "Why Buy U.S." messaging. These efforts are instrumental in reinforcing the superior quality and value of U.S. potatoes, strengthening their market presence, and addressing growing competition from European Union and Canadian suppliers.

Guatemala Imports from the World
Frozen French Fries and Other Potato Products

Partner Country	January - December (Value: USD)			Market Share (%)		
	2022	2023	2024	2022	2023	2024
United States	55,252,872	67,829,917	79,412,064	86.72	84.57	85.66
Belgium	2,984,132	3,997,257	5,939,082	4.68	4.98	6.41
Netherlands	2,414,918	4,680,185	3,297,311	3.79	5.84	3.56
Canada	1,778,635	2,475,152	2,468,322	2.79	3.09	2.66
Other countries	1,282,456	1,225,779	1,589,556	2.02	1.81	1.71
Total	**63,713,013**	**80,209,290**	**92,706,335**	**100**	**100**	**100**

Source: Trade Data Monitor

European Union: Countries such as Belgium and the Netherlands, recognized as global leaders in frozen potato products, export to Guatemala, leveraging their reputation for high-quality and standardized offerings.

Canada: Known for its strong potato industry and competitive pricing, Canada also exports frozen potatoes to Guatemala. However, it captures only 2.6 percent of total imports, reflecting limited market penetration.

While Guatemala produces potatoes domestically, its processing infrastructure for French fries remains underdeveloped. This has created a reliance on imports to meet demand, particularly for standardized, high-quality frozen products. Imported French fries are widely available in supermarkets and grocery stores, catering to household consumption. Brands compete on factors such as price, quality, and packaging to attract consumers.

Fast-food chains, restaurants, and catering companies are the largest consumers of imported French fries, prioritizing bulk purchasing and consistent quality. Distributors and wholesalers play a critical role in supplying these products to both retail and food service sectors.

Canned Vegetables

Canned vegetables represent a niche but growing segment in Guatemala, particularly in urban areas. As urbanization increases, so does the demand for convenient, shelf-stable food products like canned vegetables. While these products are often more expensive than fresh produce, limiting their appeal to lower-income households, middle- and upper-income consumers, along with the food service industry, are driving growth in this category.

Guatemalan cuisine traditionally emphasizes fresh ingredients, but canned vegetable consumption spikes during the All-Saints' Day holiday (November 1st) due to the preparation of *Fiambre*, a traditional dish associated with this celebration. *Fiambre* is a complex dish that incorporates canned vegetables for convenience and consistency.

In the HORECA sector, canned vegetables play a vital role as ingredients in soups, stews, and other dishes, ensuring consistent flavor and texture. Commonly used products include peas, carrots, corn, and green beans.

Restaurants offering international menus often use canned tomatoes, corn, or mushrooms in sauces, stir-fries, and toppings. Hotels rely on canned vegetables for buffet-style meals, where ease of preparation and consistency are essential.

This growing segment highlights the importance of convenience and versatility in both household and foodservice applications, particularly as Guatemala's urban population continues to expand.

2024 Guatemala Imports from the World
Product Group: Canned Vegetables and Pulses

		HS Code / Products	Market Share (%)
World	**$ 64,418,845**		
El Salvador	$ 17,105,748	200559 - beans not shelled	26.55
		200599 - vegetables and mixtures of vegetables prepared or preserved	
		200551 - beans shelled	
United States	$ 14,195,660	200290 - tomatoes (paste/puree)	22.04
		200580 - sweet corn	
		200559 - beans not shelled	
		200599 - vegetables and mixtures of vegetables prepared or preserved	
Chile	$ 12,561,316	200290 - tomatoes (paste/puree)	19.5
China	$ 5,799,612	200310 - mushrooms	9
		200480 - sweet corn	
		200290 - tomatoes (paste and puree)	

Mexico	$ 4,429,797	200551 - beans shelled	6.88
Honduras	$ 4,351,037	200599 - vegetables and mixtures of vegetables prepared or preserved	6.75
Spain	$ 2,277,703	200570 - olives, prepared or preserved	3.54

Source: Trade Data Monitor

Some canned vegetable products are produced in Guatemala for export to neighboring countries and international markets.

Within the domestic market, major retail chains such as Walmart, La Torre, and Paiz serve as key distributors, catering primarily to middle- and upper-income consumers.

Smaller urban stores also stock canned vegetables for quick, convenient purchases. Guatemalan producers often offer canned vegetables at competitive prices, appealing to cost-conscious consumers while maintaining a presence in both local and export markets.

Global brands like Del Monte, Green Giant, and others are well-established in Guatemala, targeting higher-income consumers with premium products. Supermarkets frequently offer private-label canned vegetables at lower prices, creating competition with both local and international brands. The three largest product categories in the canned vegetable market are canned tomatoes (paste, puree, or diced), black or red beans (puree and whole cooked beans), and sweet corn.

Canned Tomatoes

As urbanization continues to rise, demand for convenient food products, including canned tomatoes, is expected to grow. Urban households and restaurants increasingly prefer canned tomatoes for their longer shelf life and ease of use, particularly in Guatemala City, where supermarkets and grocery stores are more likely to stock these products compared to rural areas.

The affordability of canned tomatoes relative to fresh tomatoes plays a significant role in their market potential. Competitively priced canned tomatoes appeal to middle-income households, while restaurants, hotels, and catering services rely on them for consistency and convenience in large-scale food preparation.

The market features both local and international brands, with global players such as Del Monte and Hunt’s competing against regional producers offering similar products. Local producers may hold an advantage in pricing and distribution, particularly in rural areas where logistical challenges can make imported products less accessible.

Chile is the largest exporter of canned tomatoes to Guatemala, with exports totaling $13 million in 2024. The United States follows with $8 million in exports, which have experienced an impressive annual growth rate of 48 percent over the past three years. This dynamic market reflects a balance between affordability, convenience, and quality, with opportunities for both local and international brands to expand their presence in Guatemala's growing canned vegetable sector.

Canned U.S. Tomato Exports to Guatemala Years 2022-2024						
				Market Share (%)		
Description	**2022**	**2023**	**2024**	**2022**	**2023**	**2024**
Tomatoes, other than whole or in pieces (including paste and puree), prepared or preserved otherwise than by vinegar or acetic acid	$5,685,507	$4,047,930	$7,881,407	51.18	38.69	55.52

Source: Trade Data Monitor

Beans

The market for processed beans in Guatemala is deeply influenced by the country's strong cultural and dietary reliance on beans, particularly black beans, which are a staple food. While many households continue to prepare beans from scratch, urbanization, busier lifestyles, and the growing need for convenience have driven demand for processed options such as canned or pre-cooked beans. The market includes a variety of products, including canned whole beans, refried beans, and bean-based items like soups and spreads. These products are widely available in supermarkets, convenience stores, and local markets, catering to both household and food service needs.

Both domestic and imported brands compete in this space, with price and taste serving as key factors for consumer decision-making. Processed beans are also widely used in the foodservice industry, including restaurants and catering businesses, where convenience and consistency are essential. Guatemala has a well-established tradition of processing black beans, particularly for refried beans. Local companies produce refried beans for domestic consumption and export, leveraging the country's strong cultural connection to this product. These processed beans are sold under domestic brands and are readily available in supermarkets and local markets.

Guatemala exports some of its processed bean products to neighboring countries and to Guatemalan communities in the United States, where demand for culturally familiar foods remains high. Despite its significant domestic processing capacity, Guatemala also imports processed beans to meet demand, particularly for canned products. Major suppliers of canned beans include El Salvador, the United States, and Mexico, which provide a range of products to complement Guatemala's domestic offerings.

This market reflects a balance between tradition and modern convenience, with opportunities for both local producers and international suppliers to expand their presence in Guatemala's growing processed bean sector.

2024 Guatemala Imports from the World
Product Group: Beans Shelled / Not Shelled

	Value USD	HS Code / Products
El Salvador	$ 17,105,748	200559 - beans not shelled
	$ 1,059,777	200551 - beans shelled
United States	$ 1,125,610	200559 - beans not shelled
	$ 413,741	200551 - beans shelled
Mexico	$ 1,179,716	200551 - beans shelled
	$ 769,300	200559 - beans not shelled
Costa Rica	$ 408,724	200559 - beans not shelled

Source: Trade Data Monitor

Dehydrated Vegetables

Guatemala's market for dehydrated vegetables is shaped by its agricultural strengths, trade dynamics, and evolving consumer preferences. As an agricultural country, Guatemala has a strong tradition of producing fresh vegetables, particularly for export markets. However, the production of dehydrated vegetables remains limited.

While Guatemala has the capacity to grow vegetables suitable for dehydration, such as carrots, onions, and peppers, the infrastructure and technology required for large-scale dehydration processes are less developed compared to countries with more advanced food processing industries. Small-scale dehydration operations may exist, but they are likely focused on niche markets or local consumption rather than large-scale production or exports.

To meet specific market demands, Guatemala imports dehydrated vegetables, particularly for use in the processed food industry, restaurants, and households seeking convenient, shelf-stable options. These imports are often sourced from countries with well-established food processing industries, such as the United States, Mexico, and China. Commonly imported products include dried onions, garlic, peppers, and mixed vegetable blends.

The demand for dehydrated vegetables in Guatemala is driven by their convenience, long shelf life, and the growing popularity of processed and packaged foods. In the food manufacturing sector, dehydrated vegetables are essential ingredients in soups, sauces, and ready-to-eat meals. Restaurants and catering businesses also rely on these products for their ease of use and consistency. Guatemala's food processing sector depends heavily on imports to meet these needs, highlighting an opportunity for both local producers to expand their capabilities and for international suppliers to strengthen their presence in this growing market.

Glassed-packaged processed vegetables

In Guatemala, particularly in urban areas, consumers are showing a growing interest in convenience and high-quality food products. Glass packaging is often associated with premium offerings due to its ability to preserve freshness and its environmentally friendly image. This packaging format appeals to middle- and upper-income consumers who prioritize quality and sustainability in their purchasing decisions.

However, price sensitivity remains a key consideration, especially in rural areas where disposable income is more limited. In these markets, glass-packaged products may struggle to compete with more affordable alternatives, such as canned or plastic-packaged vegetables. As a result, the adoption of glass-packaged processed vegetables is likely to remain concentrated in urban centers and among higher-income demographics.

4. Market Trends

The HORECA sector in Guatemala increasingly relies on processed vegetables due to their convenience, consistent quality, and reduced preparation time. These attributes align with the sector's need for efficiency in food preparation, particularly in establishments serving large volumes of customers.

Additionally, processed vegetables are often preferred for their adherence to higher food safety standards, a critical factor for businesses in the hospitality and foodservice industries. While there is growing interest in locally sourced and sustainably processed vegetables—driven by consumer demand for environmentally friendly practices and support for local producers—the rise of international cuisine within Guatemala's HORECA sector has expanded the demand for diverse vegetable products. This includes frozen, canned, and pre-cut options, which offer versatility and ease of use in a variety of dishes.

The sector's increasing focus on plant-based and health-conscious menus has further boosted demand for processed vegetables as essential ingredients. These products also address challenges related to seasonal availability, ensuring a consistent supply of high-quality vegetables for

HORECA establishments throughout the year. This combination of convenience, reliability, and adaptability makes processed vegetables a vital component of Guatemala's evolving foodservice industry.

5. Opportunities in the HORECA Sector for Processed Vegetables

Introducing innovative formats, such as pre-seasoned or ready-to-cooked processed vegetables, can effectively address the HORECA sector's demand for convenience and variety. Upscale hotels and restaurants, which often prioritize quality and consistency, present opportunities for premium processed vegetable products tailored to their needs. Guatemala's expanding tourism industry is driving increased demand for processed vegetables in hotels and restaurants catering to international visitors. Collaborating with food distributors specializing in the HORECA sector can streamline market entry and ensure widespread availability. Offering tailored solutions, such as bulk packaging, specific vegetable cuts, or customized seasoning, can further meet the unique requirements of catering businesses.

While the market offers significant potential, challenges such as price sensitivity, competition from fresh produce, and the need for robust distribution networks must be carefully addressed. Success in this sector will depend on competitive pricing, consistent quality assurance, and strategic partnerships with distributors and food service providers. For detailed information on import regulations and standards for exporting to the Guatemalan market, consult the following FAS reports:

- FAIRS (Food Agricultural Imports, Regulations, and Standards Report)
- Exporter Guide
- Retail Report

These resources provide valuable insights into market conditions and regulatory requirements. They are available at: https://gain.fas.usda.gov/#/home

Attachments:

No Attachments.