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Report Highlights:

Rice production in Guatemala continues to face constraints, as unfavorable weather conditions and limited access to improved seed varieties hinder yield growth. As a result, imports are expected to remain stable to meet domestic consumption demand, with the United States maintaining its position as the primary supplier. White corn production is projected to increase modestly to support human consumption needs. Guatemala does not produce yellow corn for feed and remains heavily reliant on imports. These imports are expanding at a pace that exceeds feed demand, leading to stock accumulation as a buffer against trade disruptions associated with port inefficiencies. The bulk expansion of Port Quetzal is anticipated to be completed by 2028.

KEY ABBREVIATIONS:

CAFTA-DR – Dominican Republic-Central America Free Trade Agreement

CIF – Cost, Insurance, and Freight

CY – Calendar Year

FLAR – Irrigated Latin American Rice Fund

FSI – Food, Seed, and Industrial

Ha – Hectares

ICTA – Agricultural Science and Technology Institute

MAGA – Ministry of Agriculture of Guatemala

MRE – Milled Rice Equivalent

MT – Metric Tons

MY – Marketing Year

TRQ – Tariff-Rate Quota

TY – Trade Year

VAT – Value-Added Tax

Contents

RICE

Production:

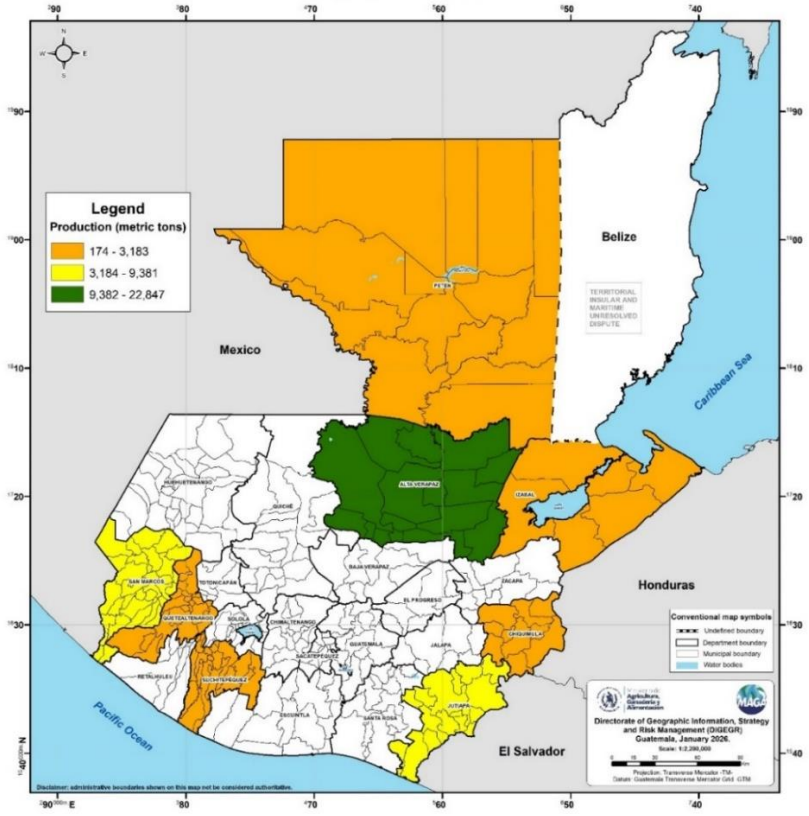
In Market Year (MY) 2026/27, Guatemala's milled and rough rice production is forecast to increase modestly to 18,000 metric tons (MT) of milled rice equivalent (MRE) across approximately 5,000 hectares of commercial plantings. This follows an estimated decline to 16,000 MT in MY 2025/26, driven by extended dry conditions, below-normal rainfall, elevated temperatures, and strong winds. Yields are expected to recover to 5.2 MT/Ha, consistent with MY 2024/25 levels, after falling to an estimated 4.6 MT/Ha in MY 2025/26. However, rising input costs, particularly fertilizers linked to higher oil prices (which increased by 17 percent by the end of March), are expected to continue weighing on productivity. Despite this projected recovery, structural constraints in the rice sector remain significant.

Although the Ministry of Agriculture (MAGA) reports expanded rice cultivation areas in its 2025 land cover crop map, harvested area is not increasing, and yields are expected to plateau at 5.2 MT/Ha in MY 2026/27. Limited access to improved seed varieties remains a persistent constraint. Guatemala's inability to rejoin the Irrigated Latin American Rice Fund (FLAR) continues to restrict access to higher-yielding rice genetics. In response, many producers are diversifying into higher-value crops such as onions, peppers, tomatoes, and jalapeño chili peppers, which benefit from growing domestic demand. While rice production persists across several regions, output varies considerably by geography.

In MY 2025/26, Alta Verapaz is estimated to account for approximately 50 percent of national production, followed by San Marcos (19 percent), Jutiapa (13 percent), and Izabal, Quetzaltenango, and Petén (each at roughly 6 percent). Production occurs primarily in areas ranging from sea level to 1,000 meters in elevation, with average temperatures near 27°C and annual rainfall between 900 and 2,000 millimeters. In Petén, rice area continues to decline as producers shift toward more profitable crops such as palm oil and tropical fruits, including plantains, bananas, and papayas. Addressing yield constraints across these regions will require improved access to higher-quality seed varieties.

The National Institute for Science and Technology (ICTA) under MAGA has developed several rice varieties since 1976, including the recent ICTA Robusta, which offers milling characteristics comparable to Costa Rican rice. However, limited public funding has constrained ICTA's ability to scale seed production to levels sufficient to meaningfully impact national yields and output. According to MAGA, the highest yields in MY 2026/27 are expected in Jutiapa, San Marcos, and Quetzaltenango (5.0–5.77 MT/Ha), followed by Suchitepéquez, Alta Verapaz, Petén, and Chiquimula (4.2–4.7 MT/Ha), while Izabal is projected to record the lowest yields at approximately 3.9 MT/Ha.

Figure 1
MY 2025/26 Rice Production Estimates for Main Producing Departments in Guatemala



Source: Ministry of Agriculture of Guatemala, 2025 Land Cover Crop Map, 2026

While domestic production continues to fall short of demand, Guatemala's rice processing infrastructure remains stable and capable of handling both locally produced and imported supplies. The average milling recovery rate remains steady at approximately 70 percent. The country has five industrial rice mills, with the largest facilities located in Guatemala City. Together, these mills have a combined storage capacity of up to 18,000 MT, with milling capacity of approximately 70 MT per day and a packing capacity of 35 MT per day.

Consumption and Residual:

Rice consumption in Guatemala is forecast to reach 148,000 MT in MY 2026/27, a slight increase from the estimated 146,000 MT in MY 2025/26 and 144,000 MT in MY 2024/25. This growth is driven in part by increased demand from public school feeding programs. Per capita consumption remains relatively low at approximately 8 kilograms, as corn, primarily consumed in the form of tortillas, continues to be the country's preferred staple. Given that domestic production satisfies only a limited share of total demand, Guatemala remains heavily dependent on imports to meet its rice consumption needs.

Trade:

Rice imports in Guatemala are forecast to remain steady at 130,000 MT in MY 2026/27, assuming a modest recovery in domestic production. In the near term, importers are increasing reserve stocks to mitigate supply disruptions stemming from ongoing port inefficiencies at Port Quetzal, which continue to affect the timely movement of rice and other bulk grains.

Despite stronger participation from Brazil and Costa Rica in recent years, the United States expanded its market share to 76 percent in MY 2024/25, up from 63 percent in MY 2023/24. Other suppliers include Honduras, Argentina, Costa Rica, Taiwan, and Thailand. Imports remain predominantly in the form of rough rice, accounting for approximately 96 percent of total imports, compared to 80 percent in MY 2023/24.

Following the elimination of the CAFTA-DR rice quota in calendar year 2023, the associated local purchase requirement was also removed, briefly allowing greater access for milled rice imports. However, to protect domestic milling operations, the Rice Producers Association (ARROZGUA) requested that the Ministry of Economy reinstate the local purchase requirement outside the CAFTA-DR framework. This policy adjustment has since shifted import patterns back toward paddy (rough) rice.

Table 1

Guatemalan Rice Imports in Milled Rice Equivalent (MRE) Metric Tons (MT)
In MY 2023/24 and MY 2024/25

Milled Rice Equivalent (MRE) (MT)	MY 2023/24 (Oct-Sep)	MY2024/25 (Oct-Sep)
United States	73,698	96,513
Honduras	3,396	8,425
Argentina	0	8,421
Costa Rica	7,175	6,556
Taiwan	2,330	2,580
Thailand	590	1,998
Mexico	0	681
Brazil	24,166	539
China	97	197
Uruguay	652	100
Nicaragua	1,530	75
India	53	69
Vietnam	167	56
Paraguay	1,378	26
El Salvador	1,338	25
TOTAL	**116,579**	**126,280**

Source: FAS Guatemala with Trade Data Monitoring Information, 2026

Stocks:

Guatemala does not maintain significant rice stocks, either publicly or privately. The management of these substantial import volumes is complicated by infrastructure constraints that affect storage strategies. Temporary storage is used primarily to manage short-term supply disruptions linked to port constraints; however, in most cases, imported rice is transferred directly to mills for processing. Storage capacity at milling facilities is gradually increasing as a buffer against ongoing trade disruptions, largely driven by inefficiencies at national ports.

Bulk cargo shipments may experience delays of up to 100 days, as vessels wait to berth or are redirected to alternative ports before reentering the queue. These delays, along with associated demurrage charges, have raised logistics costs by approximately $55 per metric ton of rice at Port Quetzal on the Pacific coast. The broader trade environment governing these imports continues to be shaped by Guatemala's international trade agreements and quota systems.

Policy:

Guatemala does not maintain tariff-rate quotas for rice with any trading partner. The only applicable tax is the 12 percent Value Added Tax (VAT), which is applied uniformly to the cost, insurance, and freight (CIF) value of all imported goods, regardless of origin. Rice imports from the United States enter duty free following the full implementation of tariff elimination under CAFTA-DR after 18 years of phased reductions.

Imports from other countries may qualify for duty-free access through the Ministry of Economy's annual shortage quota system, which allocates volumes at the beginning of each year. For calendar year (CY) 2026, the rice shortage quota is set at 60,000 MT, representing a 50 percent increase from the 40,000 MT quota in CY 2025. Additionally, Guatemala maintains export quotas of 2,212 MT to the European Union and 4,493 MT to the United Kingdom in CY 2026. Once imported, rice moves through well-established distribution channels, ensuring efficient delivery from mills to wholesalers, retailers, and ultimately consumers.

Marketing:

Rice distribution in Guatemala continues to rely predominantly on traditional channels, with approximately 84 percent of sales occurring through the country's 50,000 municipal stores, while the remaining 16 percent is sold through roughly 700 retail outlets, primarily supermarkets. As urbanization increases and mobility constraints persist in major cities such as Guatemala City and Quetzaltenango, the expansion of supermarkets and convenience stores is accelerating.

As illustrated in Figure 2, wholesale prices for white rice have remained relatively stable since January 2023, following a peak in post-pandemic prices at the end of 2022. However, by the end of March 2026, rising international oil prices contributed to a 10.4 percent increase in wholesale milled rice prices compared to the previous calendar year, with prices ranging from $1,160 to $1,270 per metric ton and a spread of approximately $110 per metric ton between first- and second-quality rice. Farm-gate prices have also risen, averaging approximately $475 per metric ton during MY 2025/26 to date.

Figure 2
Historical White Rice Prices in the Guatemalan Wholesale Markets

Source: FAS adjusted based on Guatemala's Ministry of Agriculture price data published by the Market Information System, 2026

Retail margins account for at least 30 percent of the final price paid by consumers. In MY 2025/26, retail prices vary depending on the type and presentation of rice, as illustrated in Figure 3, ranging from $0.64 to $1.19 per pound. Locally produced white long-grain rice remains the preferred variety, followed by parboiled and jasmine rice.

Figure 3
Average Retail Prices for Rice in Guatemalan Supermarkets

Source: USDA FAS Guatemala, Retail Market Survey, March 2026

Rice PSD

Rice, Milled	2024/2025		2025/2026		2026/2027	
Market Year Begins	Oct 2024		Oct 2025		Oct 2026	
Guatemala	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	5	5	5	5	0	5
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Milled Production (1000 MT)	18	18	18	16	0	18
Rough Production (1000 MT)	26	26	26	23	0	26
Milling Rate (.9999) (1000 MT)	7000	7000	7000	7000	0	7000
MY Imports (1000 MT)	139	126	125	130	0	130
TY Imports (1000 MT)	107	116	110	120	0	120
Total Supply (1000 MT)	157	144	143	146	0	148
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Consumption and Residual (1000 MT)	157	144	143	146	0	148
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	157	144	143	146	0	148
Yield (Rough) (MT/HA)	5.2	5.2	5.2	4.6	0	5.2

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Rice, Milled begins in January for all countries. TY 2026/2027 = January 2027 - December 2027

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CORN

Production:

Unlike rice, where imports dominate supply, corn production in Guatemala plays a central role in meeting domestic demand, particularly for white corn used for human consumption. Total corn production is forecast at 1.630 million MT in MY 2026/27, a slight increase from the MY 2025/26 estimate of 1.629 million MT, despite continued exposure to adverse weather conditions, including below-normal rainfall, high temperatures, and strong winds. Harvested area is expected to continue expanding to meet growing food consumption needs for white corn, while acreage dedicated to traditional varieties, ranging from white and black to yellow, orange, and red, remains relatively stable. Average yields are projected to decline slightly to 1.8274 MT/Ha in MY 2026/27, reflecting the expansion of subsistence-level production and limited gains in productivity from higher-yielding commercial varieties. Total harvested area and production estimates for MY 2026/27 are presented in Table 2.

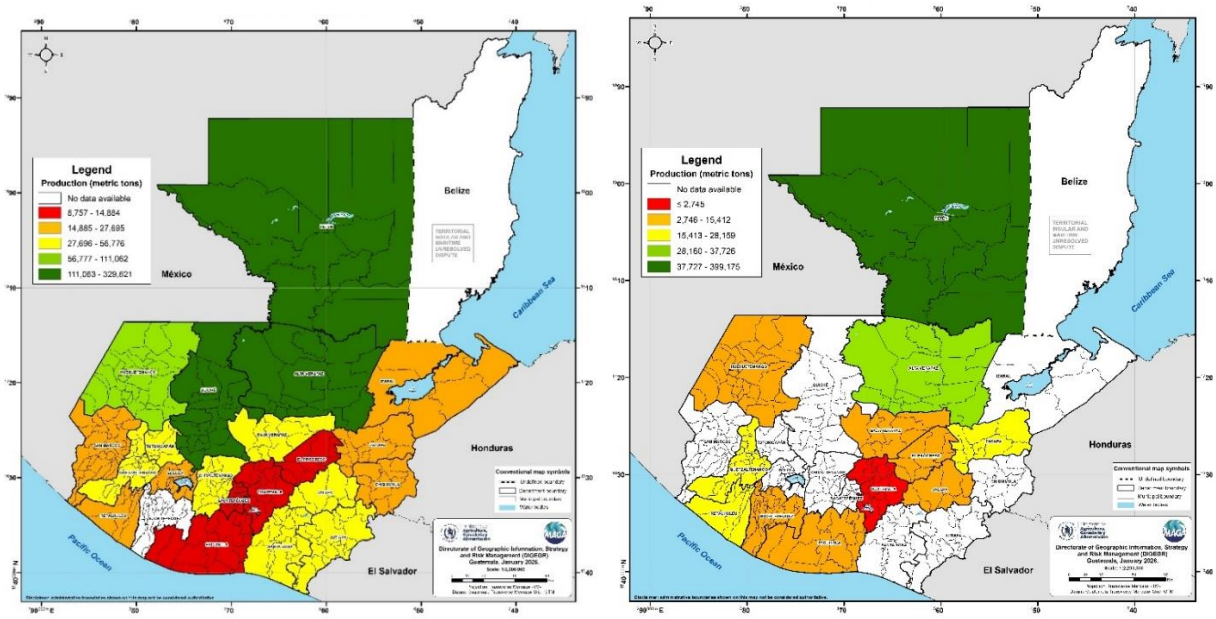
Table 2
MY 2025/26 Estimated Corn Harvest in Guatemala

Department	Area (Ha)	Production (MT)	Yield (MT/Ha)
Petén	246,845	498,692	2.0203
Alta Verapaz	116,212	303,980	2.6157
Quiché	115,868	184,011	1.5881
Huehuetenango	50,207	99,223	1.9763
San Marcos	40,447	16,993	0.4201
Quetzaltenango	38,965	69,359	1.7800
Chiquimula	29,045	22,917	0.7890
Jalapa	25,608	41,707	1.6287
Baja Verapaz	24,046	43,733	1.8187
Totonicapán	23,562	42,852	1.8187
Jutiapa	22,926	38,019	1.6583
Retalhuleu	22,156	38,805	1.7514
Zacapa	21,054	46,072	2.1883
Santa Rosa	17,540	32,606	1.8589
Chimaltenango	17,314	35,555	2.0535
Izabal	16,674	19,554	1.1727
Guatemala	15,423	14,298	0.9271
El Progreso	12,985	16,975	1.3073
Sololá	11,389	20,623	1.8107
Escuintla	9,088	18,323	2.0161
Sacatepéquez	6,052	12,317	2.0352
Suchitepéquez	5,252	12,753	2.4283
Total General	**888,660**	**1,629,369**	**1.8324**

Source: FAS Guatemala analysis using Guatemala Ministry of Agriculture estimates (MY 2026/27)

Corn production in Guatemala is distributed across two primary growing seasons, with timing and regional concentration varying significantly. The first harvest is expected to account for approximately 78 percent of total production. As illustrated in Figure 4, production is geographically concentrated, with Petén remaining the country's primary grain-producing region, accounting for 31 percent of total output. It is followed by Alta Verapaz (19 percent), Quiché (11 percent), and Huehuetenango (6 percent), while all other departments each contribute less than 5 percent of total production.

Figure 4
Corn Production Estimates for Guatemala in MY 2025/26
(left map: first harvest (Jul-Sep), right map: second harvest (Nov-Mar)



Source: Ministry of Agriculture of Guatemala (MAGA), 2025 Land Cover Crop Map, updated 2026

Consumption:

While domestic production of white corn plays a critical role in supporting food security, total consumption, driven by both human and animal feed demand, continues to exceed local supply. Guatemala's total corn consumption in MY 2026/27 is forecast at 3.540 MT, consisting of 1.665 million MT for food use and 1.875 million MT for feed. Consumption growth is primarily driven by population increases and the central role of tortillas as the main source of carbohydrates in the Guatemalan diet, with comparatively lower consumption of wheat and rice.

The feed sector is experiencing rapid expansion, significantly influencing import demand and storage requirements. To address ongoing logistical challenges at Port Quetzal, particularly limited capacity and inefficiencies in handling bulk cargo, feed producers are increasing both production and storage capacity. This is especially important given that all yellow corn used for

feed is imported. Developments in storage capacity are discussed in further detail in the Stocks section.

Poultry production in Guatemala is forecast to expand by 4.5 percent in MY 2026/27, following an estimated growth of 4.0 percent in MY 2025/26. Pork production is projected to increase by 3.5 percent in MY 2026/27, while beef production continues to grow more modestly at approximately 1.0 percent annually. In contrast, the pet food sector is expected to see stronger growth of 6.5 percent in MY 2026/27.

Feed rations are typically formulated using an approximate 2:1 ratio of corn to soybean meal, contributing to rising demand for imported yellow corn. When yellow corn prices increase, feed producers adjust formulations by increasing the share of soybean meal to help manage costs. This sustained growth in feed demand, coupled with minimal domestic production of yellow corn, continues to drive Guatemala's significant reliance on imports.

Trade:

Guatemala's imports of yellow corn are forecast to continue growing steadily to meet rising consumption demand. In MY 2026/27, imports are projected at 1.970 million MT, up slightly from an estimated 1.960 million MT in MY 2025/26. In MY 2024/25, imports reached a record high of 1.954 million MT. Table 3 provides a detailed trade matrix for the past two market years.

The United States increased its market share by 31 percent between MY 2023/24 and MY 2024/25, largely due to a decline in imports from Brazil. Yellow corn imports are primarily sourced from the United States, Brazil, and Argentina, while white corn imports originate from the United States, Mexico, Honduras, Belize, and El Salvador. Historically, the United States has been Guatemala's leading supplier of yellow corn; however, when prices rise, importers tend to shift purchases toward more competitively priced supplies from Brazil and Argentina.

Table 3
Trade Matrix for Corn Imports into Guatemala

	MY2023/24 (Jun-Jul) (MT)	MY2024/25 (Jun-Jul) (MT)
United States	987,696	1,374,765
Brazil	707,639	450,034
Argentina	116,219	120,524
Mexico	2,561	2,928
Honduras	2,056	2,415
Belize	946	2,069
El Salvador	316	965
Others	21,575	568
TOTAL	**1,839,008**	**1,954,268**

Source: USDA FAS Guatemala analysis of Trade Data Monitor (TDM), 2026

Stocks:

Managing large import volumes has become increasingly challenging due to port infrastructure constraints, prompting the industry to adapt its storage strategies. Stocks are forecast to increase by 13 percent in MY 2026/27, following an estimated 15 percent growth in MY 2025/26. This expansion is driven primarily by persistent inefficiencies at Port Quetzal on the Pacific coast, Guatemala's main bulk cargo port. In CY 2025, the feed industry reported demurrage costs and delays totaling approximately $120 million. These additional costs, estimated at $74 per metric ton for corn (compared to $55 per metric ton for soybean meal), are ultimately passed on to consumers. Bulk cargo vessels may face waiting times of up to 100 days, with costs reaching approximately $2.2 million per ship over that period. Port Quetzal continues to prioritize fuel and iron shipments over food and feed commodities. To address these constraints, the first private bulk docks (5 and 6) are expected to begin construction by mid-CY 2026, with operations anticipated by early CY 2028, prioritizing food and feed cargo.

In response to these challenges, the private sector is making significant investments in storage infrastructure. Feed importers have increased storage capacity by up to 25 percent annually to mitigate supply disruptions, which has also supported increased demand for balanced feed production. Central American Balanced Feed, LLC (CABAL) exemplifies this trend, having expanded its capacity by 50 percent over the past two years, with plans to sustain similar growth in the coming years. Located 16 kilometers from Port Quetzal, CABAL currently focuses on storage operations, distributing corn and soybean meal to inland facilities every 7 to 15 days. The company is part of the Guatemala Group, which includes major feed importers such as COMAYMA, VITAL, and PURINA. These firms operate vertically integrated supply chains, sourcing directly from ports to feed production facilities that support broiler, layer, and other animal protein production. As port delays persist, continued expansion of storage capacity remains essential to maintaining supply chain continuity.

Photos 1 and 2
Central American Balanced Feed, LLC (CABAL) Expansion in CY 2026

Source: FAS Guatemala field visit to CABAL facility, Escuintla, Guatemala, February 2026

CABAL currently maintains storage capacity of approximately 15,000 MT for corn and 6,000 MT for soybean meal, with plans to expand to 20,000 MT of corn and 11,000 MT of soybean meal by mid-CY 2026, as illustrated in Photos 1 and 2. Looking ahead, the company aims to significantly scale its operations through the construction of a total of 16 silos, increasing corn storage capacity to 80,000 MT (a 33 percent increase), along with three additional warehouses for soybean meal (an 83 percent increase).

CABAL's operations are being designed as fully mechanized systems to improve efficiency and support the growing needs of its members, who are experiencing annual demand growth of 10 to 15 percent. The company also anticipates expanding third-party sales by up to 130 percent, while aligning with the broader feed sector's average annual growth rate of approximately 4 percent in Guatemala. While private sector investments are helping to address logistical constraints, the policy environment continues to play a key role in shaping the competitiveness of corn imports.

Policy:

Guatemala continues to be a reliable trading partner under the Central America–Dominican Republic Free Trade Agreement (CAFTA-DR), maintaining negotiated tariff-rate quotas (TRQs) for white corn. For CY 2025, the TRQ for white corn was set at 28,000 MT, increasing slightly to 28,400 MT in CY 2026. In addition, a shortage quota for white corn in CY 2026 has been established at 650,000 MT. If U.S. corn prices remain competitive, the United States is well positioned to maintain or expand its market share. However, if U.S. prices become less competitive, Guatemala may shift sourcing toward Brazil or Argentina to meet its yellow corn demand, utilizing the shortage quota mechanism announced at the beginning of CY 2025, as reflected in Table 4. A 12 percent Value Added Tax (VAT) is applied to the cost, insurance, and freight (CIF) value of all imports, regardless of origin.

Table 4
CY 2026 Shortage and TRQs Open in Guatemala for Importation

Quotas	Commodity	Volume (MT)
Shortage	Yellow Corn	650,000
	White Corn	65,000
	Rough Rice	60,000
Tariff-Rate Quotas (TRQs)		
CAFTA-DR	White Corn	28,400
Belize	Yellow Corn	23,000
Mexico	Yellow Corn	150,000

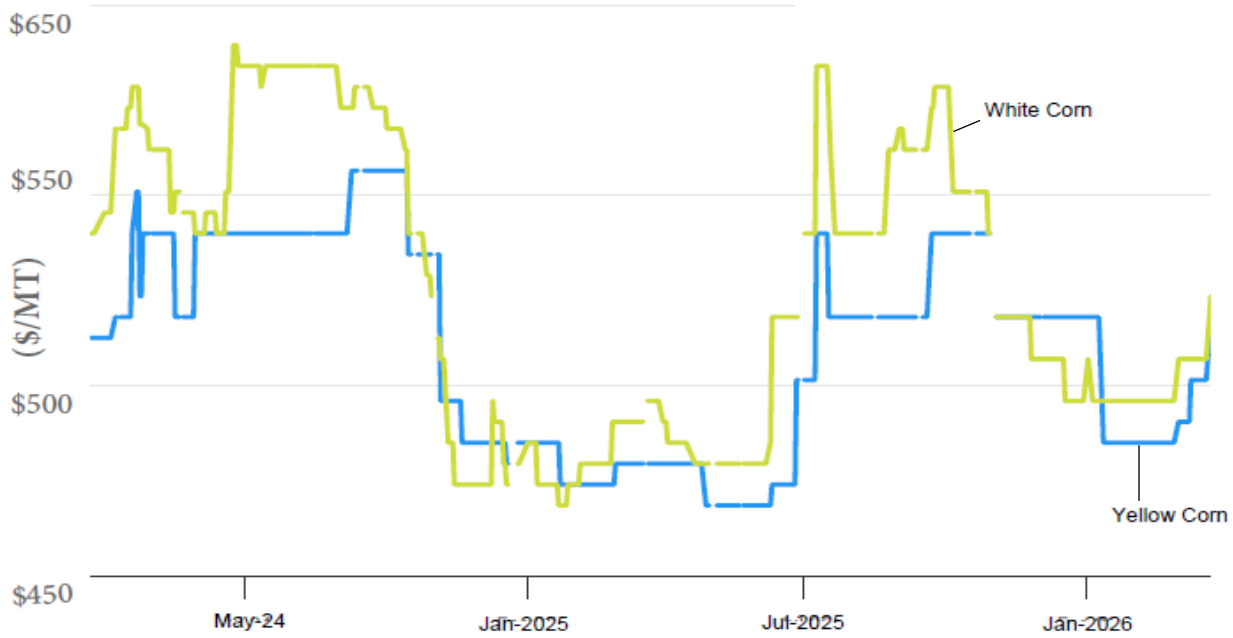
Source: FAS Guatemala, Ministry of Economy of Guatemala Official Import Quota List for Calendar Year 2026

The Ministry of Agriculture (MAGA) has implemented several programs to support white corn production for food security. However, these initiatives have produced limited measurable results. The long-standing fertilizer program, operational for more than two decades, has shown no significant impact on productivity, as supported by independent academic studies. Similarly, efforts to expand the use of improved varieties and hybrid seeds through the National Institute for Science and Technology (ICTA) have been constrained by insufficient funding for public research and development. Despite these challenges, some released varieties and hybrids have demonstrated success in rural areas. Overall, these policy frameworks and support programs continue to shape production outcomes and, ultimately, influence price dynamics across Guatemala's corn marketing channels.

Marketing:

Figure 5 illustrates historical informal wholesale prices for both white and yellow corn in Guatemala. By the end of March 2026, wholesale prices for white corn ($24.68 per 100 pounds) and yellow corn ($24.36 per 100 pounds) had increased by approximately 9 to 10 percent, largely driven by rising oil prices. At the retail level, white corn is primarily sold as corn flour, which is widely used for tortilla production. As of March 2026, average retail prices for corn flour were $14.73 for a 25-pound bag and $5.76 for a 5-pound bag, equivalent to approximately $0.60 to $1.15 per pound.

Figure 5
Historical Informal Wholesale Prices for Corn in Guatemala



Source: USDA FAS Guatemala analysis based on the Ministry of Agriculture of Guatemala Market Information System, 2026

Corn PSD

Corn	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jul 2024		Jul 2025		Jul 2026	
Guatemala	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	886	886	890	889	0	892
Beginning Stocks (1000 MT)	296	296	346	361	0	415
Production (1000 MT)	1625	1626	1630	1629	0	1630
MY Imports (1000 MT)	1954	1954	1950	1960	0	1970
TY Imports (1000 MT)	1966	1968	1950	1975	0	1985
Total Supply (1000 MT)	3875	3876	3926	3950	0	4015
MY Exports (1000 MT)	4	4	10	5	0	5
TY Exports (1000 MT)	7	7	10	10	0	10
Feed and Residual (1000 MT)	1875	1859	1900	1870	0	1875
FSI Consumption (1000 MT)	1650	1652	1675	1660	0	1665
Total Consumption (1000 MT)	3525	3511	3575	3530	0	3540
Ending Stocks (1000 MT)	346	361	341	415	0	470
Total Distribution (1000 MT)	3875	3876	3926	3950	0	4015
Yield (MT/HA)	1.8341	1.8352	1.8315	1.8324	0	1.8274

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Corn begins in October for all countries. TY 2026/2027 = October 2026 - September 2027

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Attachments:

No Attachments