

Guatemala

Corazón del Mundo Maya

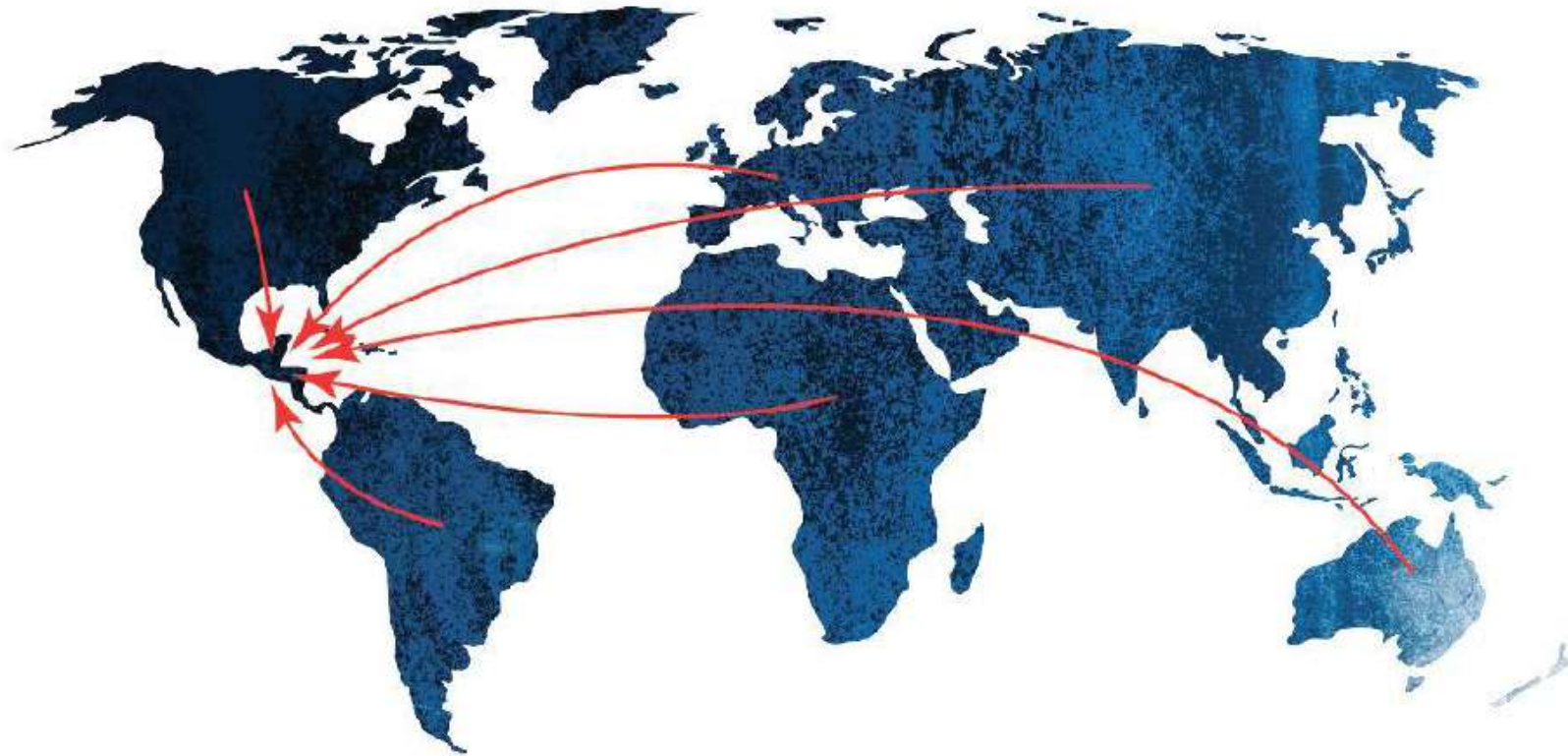


CORAZÓN DEL MUNDO MAYA

Aquí nacen las leyendas de una de las culturas más sorprendentes del mundo. Sus fascinantes sitios arqueológicos están rodeados de selva, entre ellos el Parque Nacional Tikal que fue declarado Patrimonio Natural y Cultural de la Humanidad por **UNESCO** en 1979.



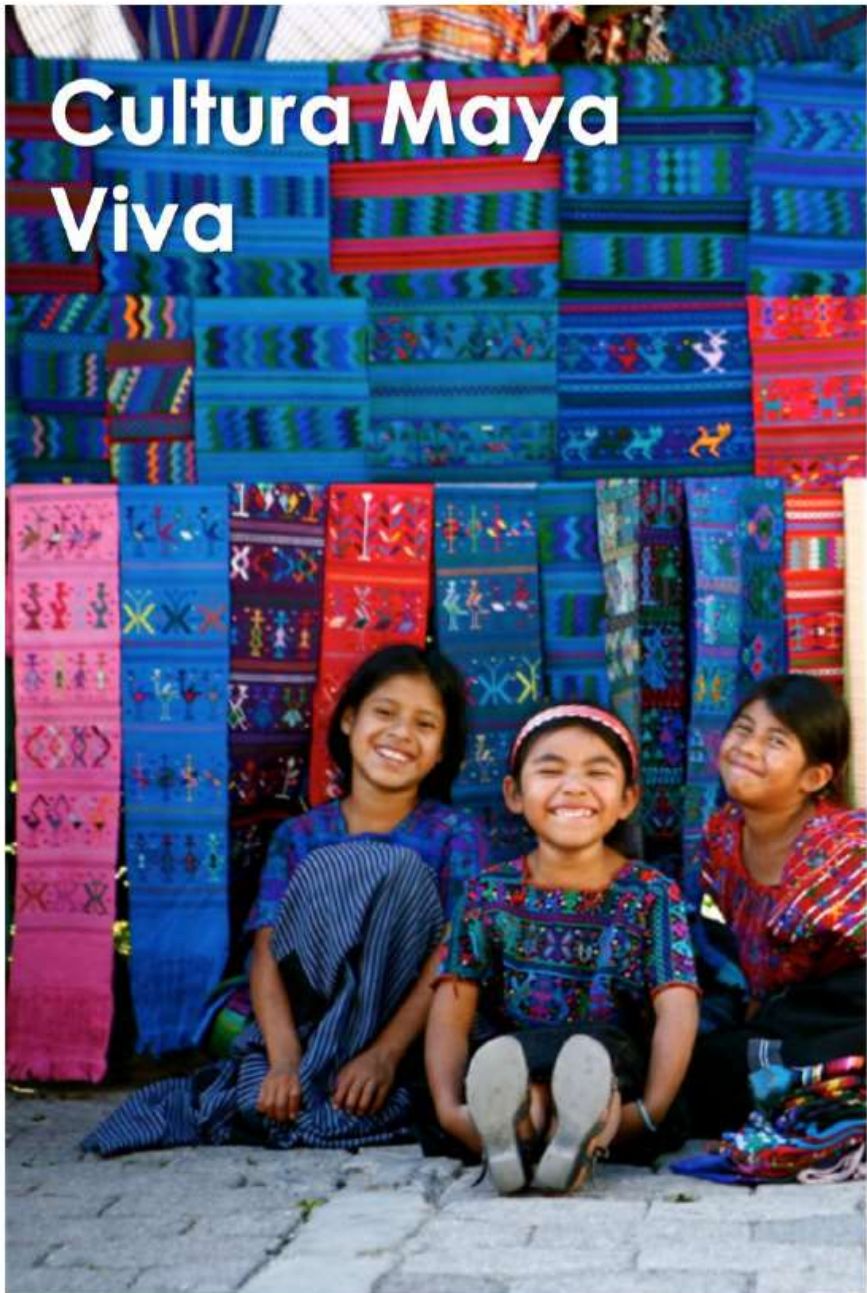
Guatemala has a privileged geographical location, in the center of the Americas



98% of visitors to Guatemala recommend our amazing destinations

Guatemala
Corazón del Mundo Maya

Cultura Maya Viva



Chichicastenango, Barriletes Sumpango, Día de todos los Santos



Cartuchos Atitlán, Ritual Sagrado Laguna de Chicabal

Guatemala
Corazón del Mundo Maya

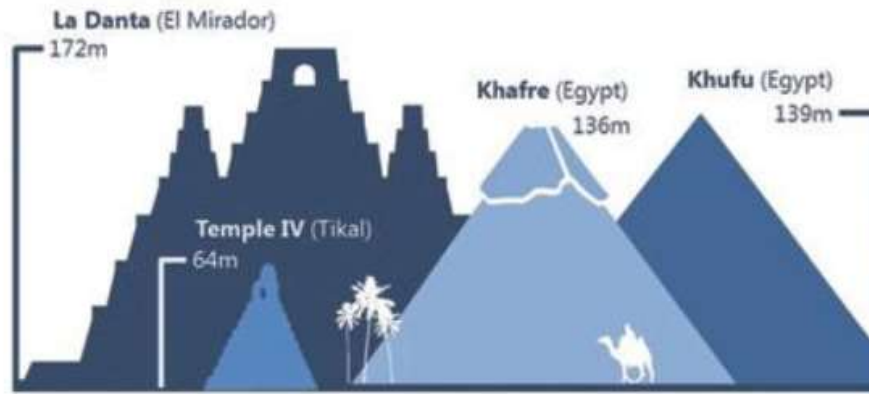


Gastronomía Guatemalteca

Guatemala
Corazón del Mundo Maya



Período Pre Clásico



LA DANTA (172m)

Parque Nacional Mirador-Río Azul
cuenta con un volumen mayor
a las pirámides de Egipto

Republic of Guatemala

CAPITAL: Guatemala

AREA: 108.889 Km²

TEMPERATURE: average 15°C – 25°C

POPULATION: about 17 millions inhabitants

OFFICIAL LANGUAGE: Spanish

GDP per capita: US\$68.18 billion (2016 est.)
US\$7,900 PPP

FISCAL DEFICIT : Q. 111,020 millions

EXCHANGE RATE: Q. 8.76 x 1€



MACROECONOMIC CLIMATE:

In the last 20 years we've had:

- Stability in GDP growth: 4.1%
- Moderate inflation movements: 2.9%
- Moderate fiscal deficit: close to 2%
- Very moderate debt: 25.75% of GDP
- Stable exchange rate: less 5% variation
- International reserves: US\$ 7.7 billion

Macro Strength and Stability

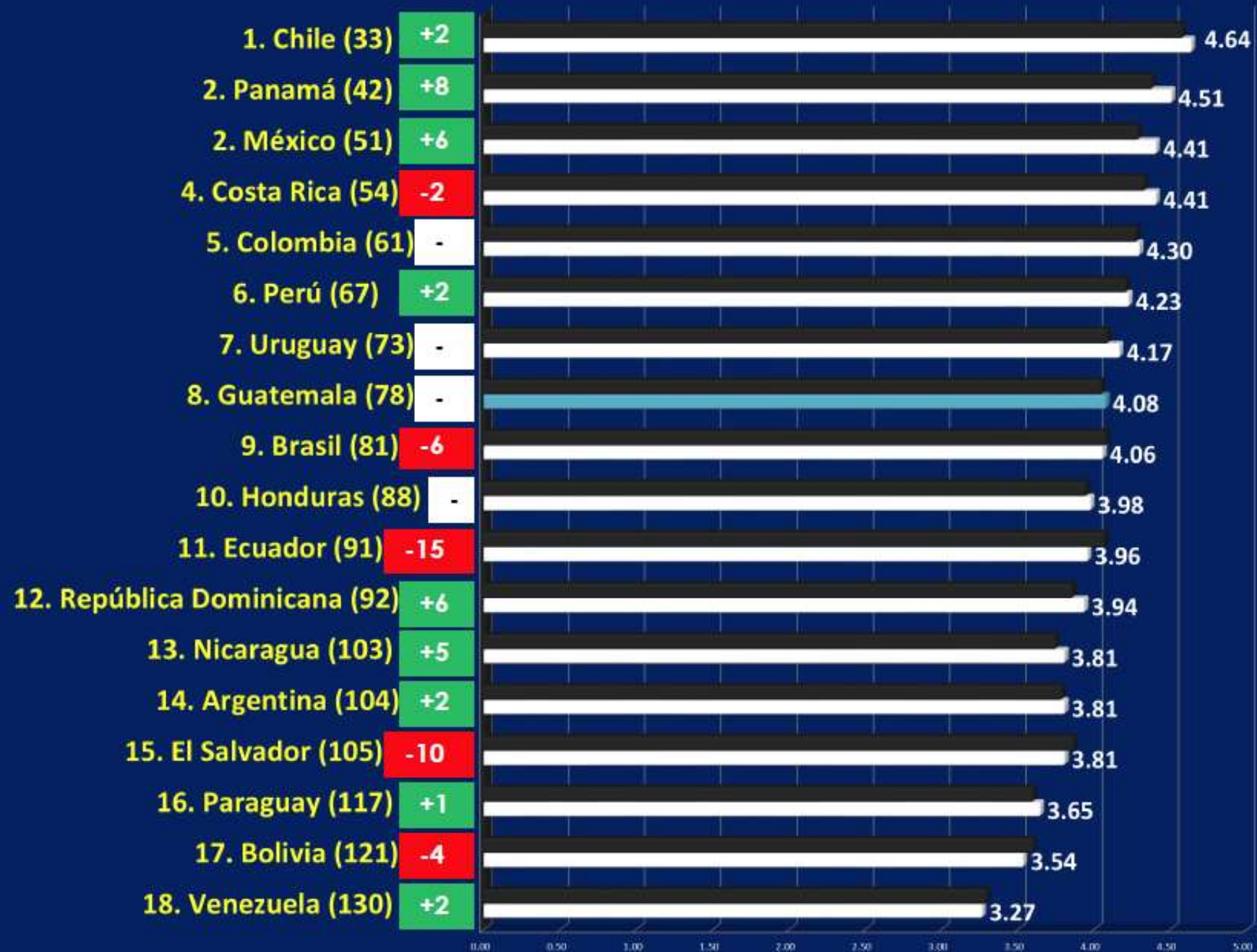
AGENCY	2005	2008	2012	2015
FITCH	BB- (1)	BB+ (Stable)	BB+ (Stable)	BB
MOODY'S	Ba2 (Stable)	Ba2 (Stable)	Ba1 (Stable)	Ba1
S&P	BB-(Stable)	BB (Stable)	BB (Stable)	BB
OCDE	6	5	5	4

GLOBAL COMPETITIVENESS INDEX

Global Competitiveness Index						
	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017
Guatemala Rank	84	83	86	78	78	78
Countries	142	144	148	144	140	138

SOURCE:
<http://www.fundesa.org.gt/en/international-indexes/>

Global Competitiveness Index 2016-2017 Latinamerica



DOING BUSINESS

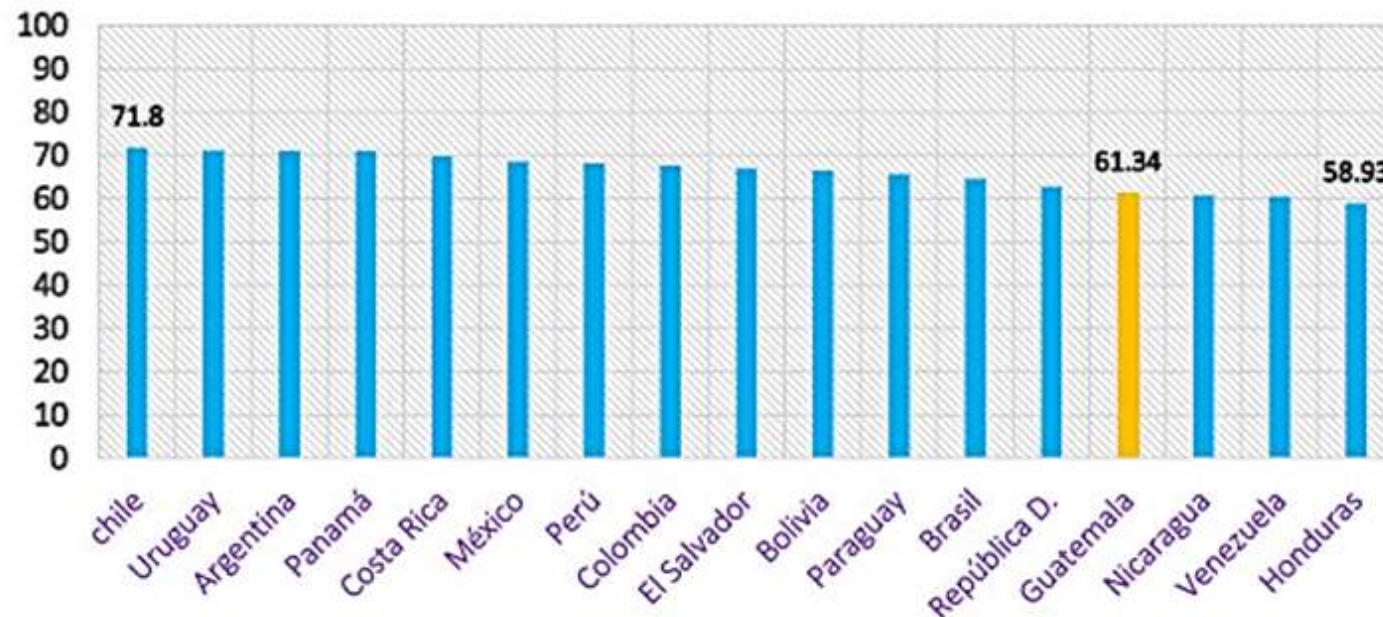
Doing Business						
	2012	2013	2014	2015	2016	2017
Guatemala Rank	98	93	79	73	81	88
Countries	183	185	180	189	189	190

ENABLING TRADE INDEX

Enabling Trade Index			
	2010	2012	2014
Guatemala Rank	73	77	62
Countries	125	132	138

HUMAN CAPITAL INDEX

Human Capital Index			
	2013	2015	2016
Guatemala Rank	84	86	94
Countries	122	124	130



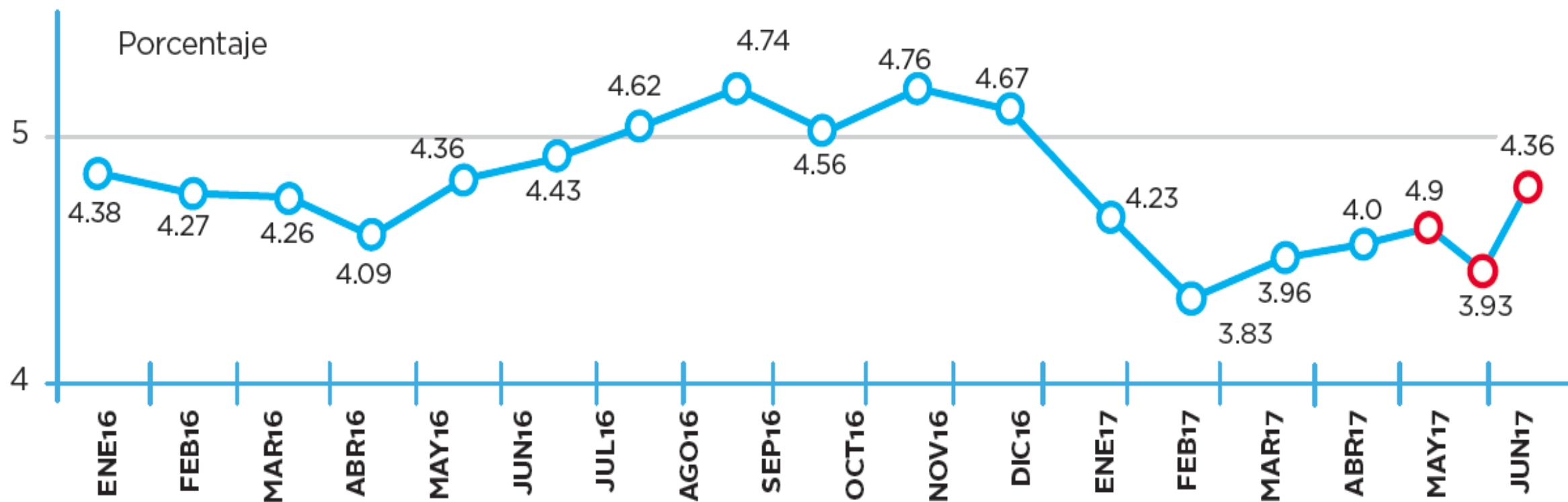
SOURCE:
<http://www.fundesa.org.gt/en/international-indexes/>



Lago de Atitlán, Sololá

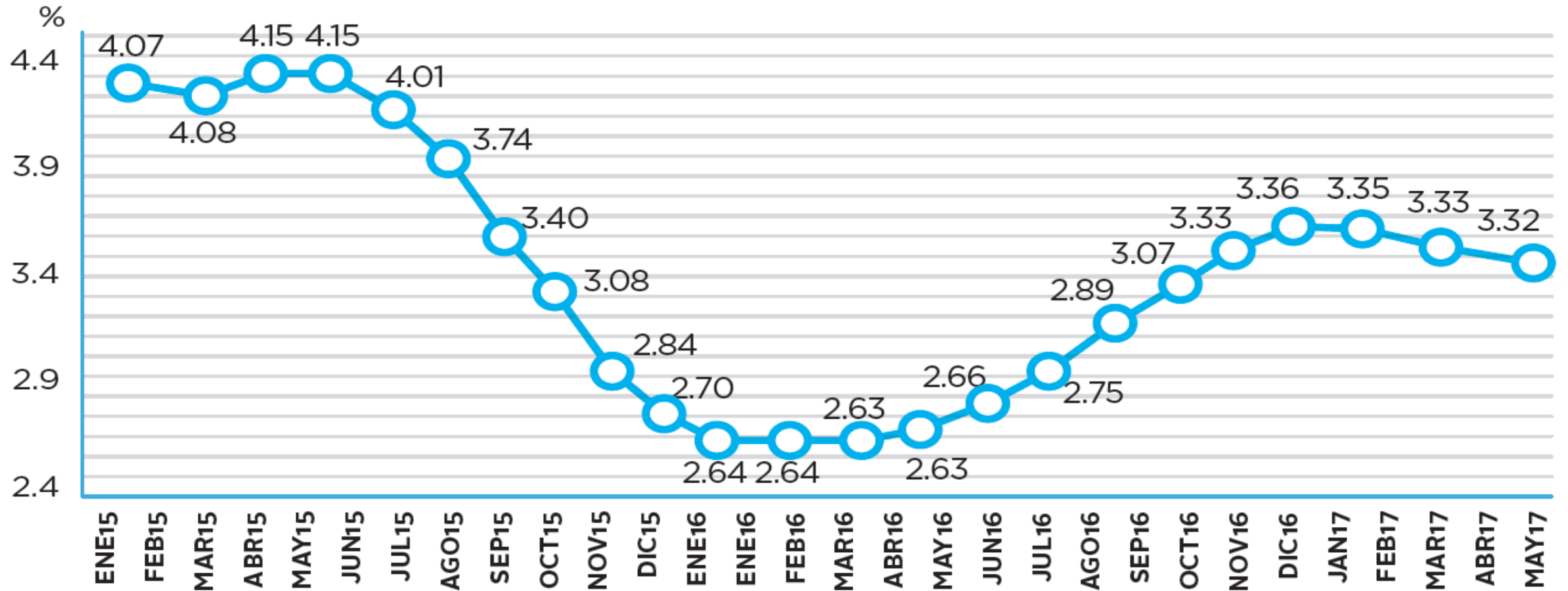
Guatemala
Corazón del Mundo Maya

IPC index (inflation index)



Fuente: Instituto Nacional de Estadística, INE, julio 2017,
*Tasa de variación del mes actual con respecto al mismo mes del año anterior

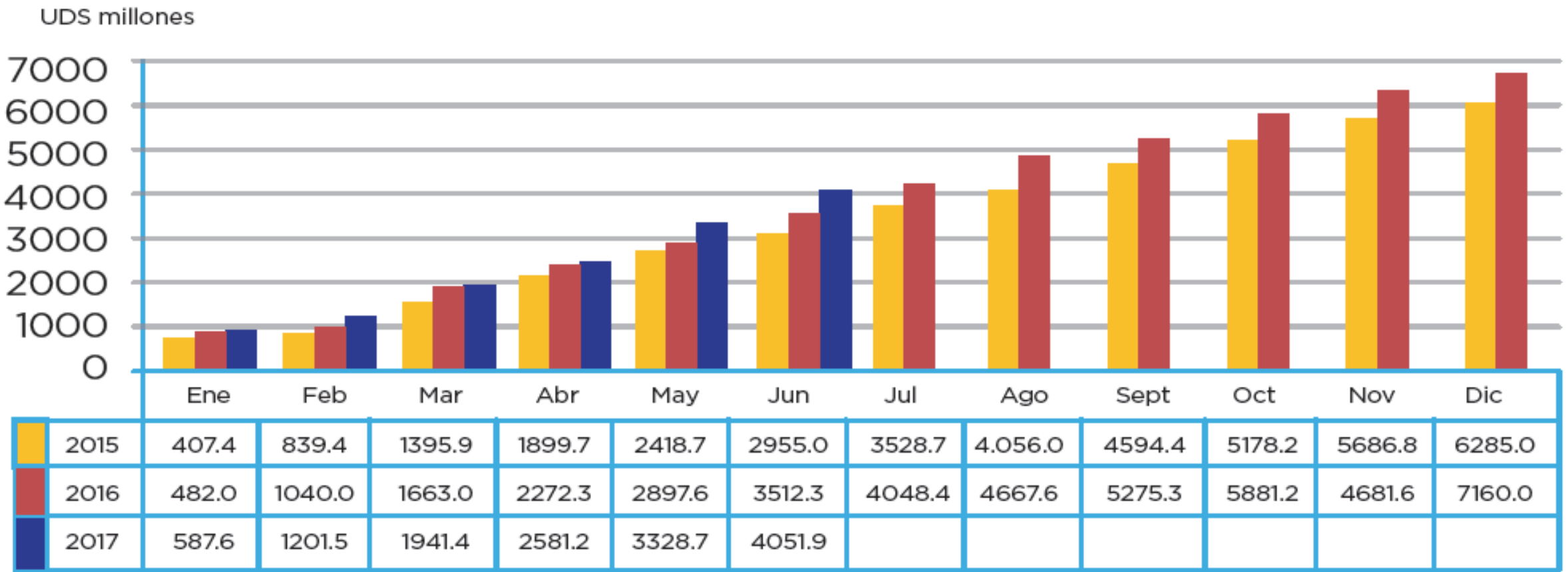
Monthly Economic Activity Index (IMAE)



Fuente: Banco de Guatemala, julio 2017. *Indice tendencia-ciclo
Muestra la variación del mes en estudio con respecto al mismo mes del año anterior

External Income

(sent to Guatemala from abroad)

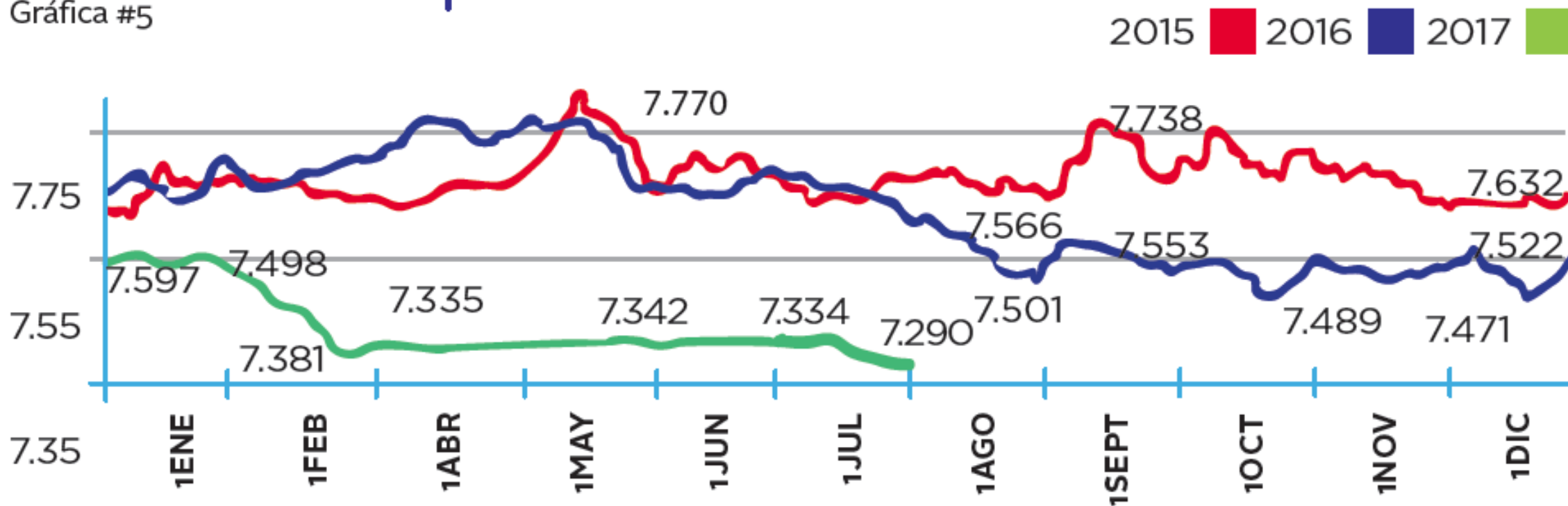


Fuente: Banco de Guatemala, en base al mercado institucional de divisas, hasta el 30-06-2017

Exchange rate (1US\$ - quetzal)

Tipo de cambio | 2015-2017

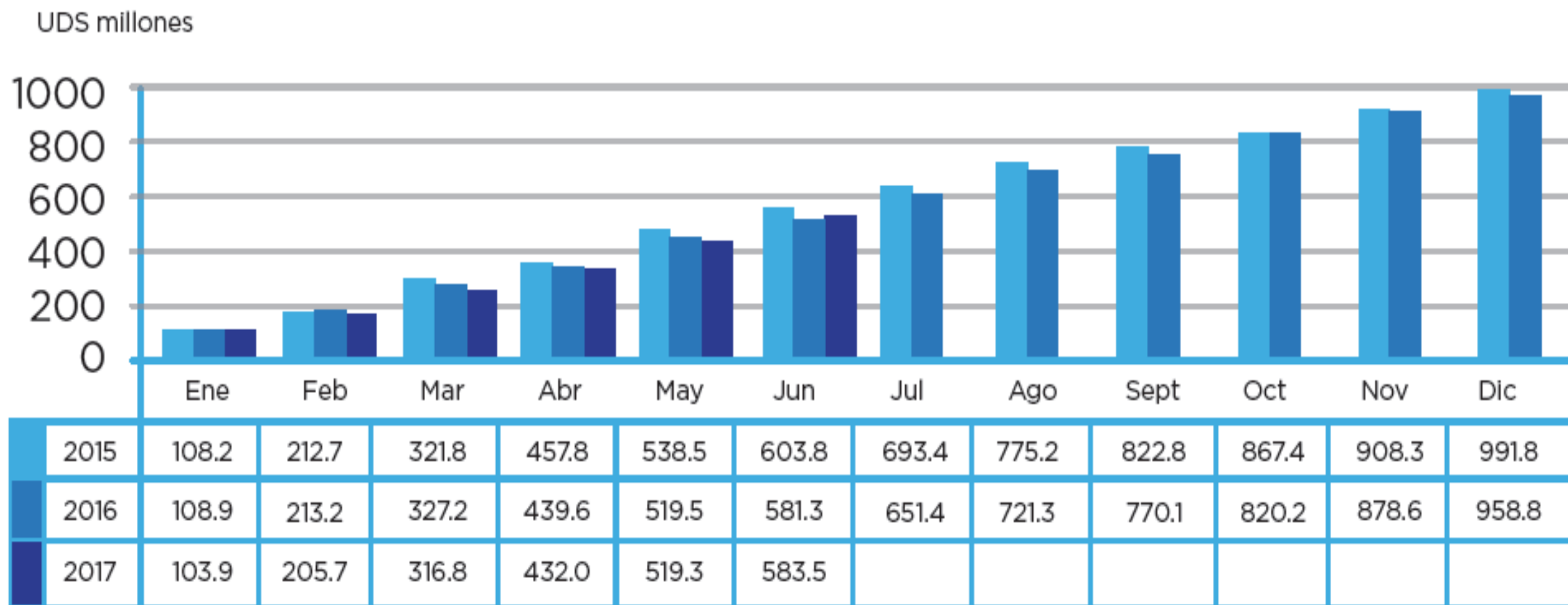
Gráfica #5



Fuente: BANGUAT, tipo de cambio de referencia nominal promedio ponderado *hasta 27-07-2017.

Cumulative income

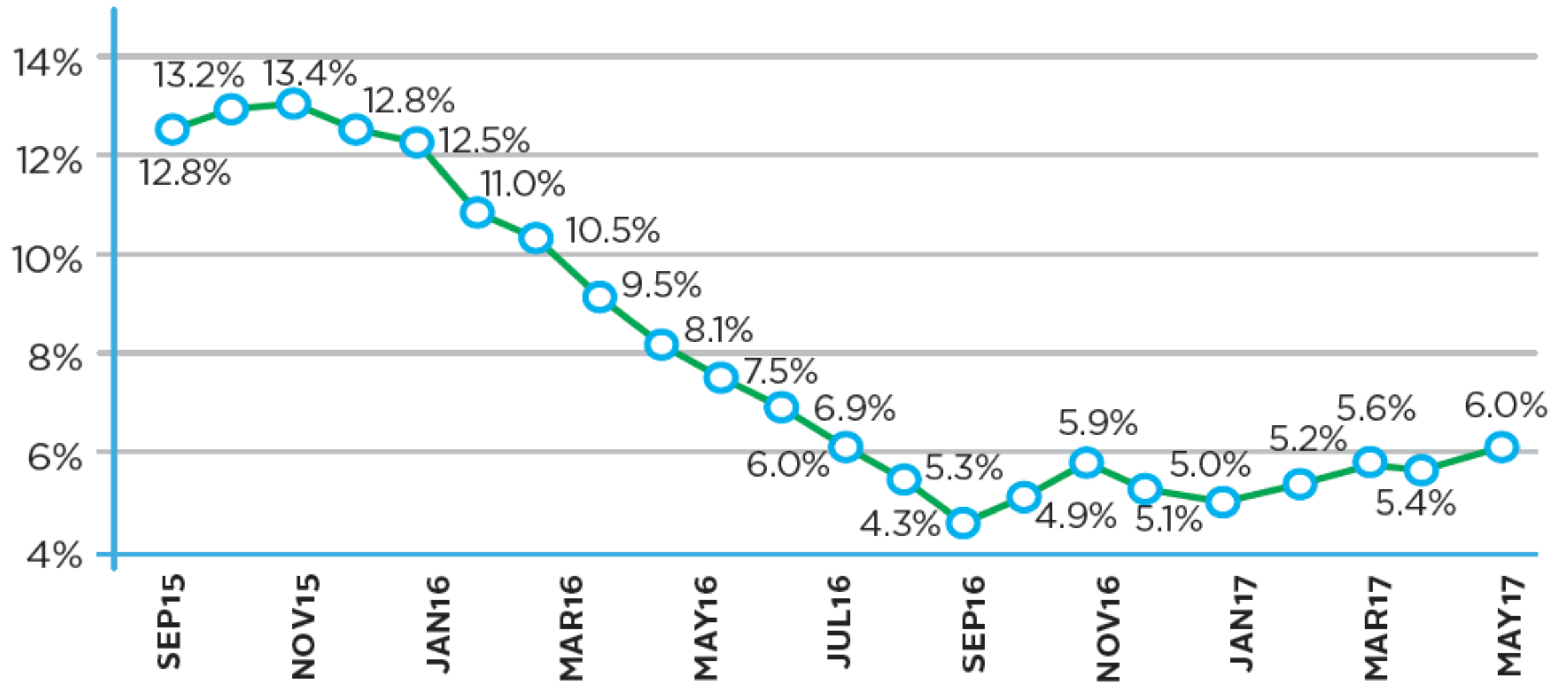
(tourism & trips) Jan15-June17



Fuente: Banco de Guatemala, en base al mercado institucional de divisas, hasta el 30-06-2017

Bank credit to private sector

2015-june2017 (year variation %)



Fuente: Banco de Guatemala, julio 2017



Guatemala Foreign Trade 2016

EL Gran Jaguar, Parque Nacional Tikal

Guatemala
Corazón del Mundo Maya

Exports 2016

The total amount exported by Guatemala in 2016 was US\$11,3 billion, 0.5% less than (US\$51.6 millions) than in 2015.

Main Exported Products	
Clothing	US\$1,325.7 mill (12.3%)
Sugar	US\$850.9 mill (7.9%)
Banana	US\$759.5 mill (7.1%)
Coffee	US\$663.0 mill (6.2%)
Oil & oil related prod.	US\$361.0 mill (3.4%)
Others	36.9% from the total

Exports by Sector 2016



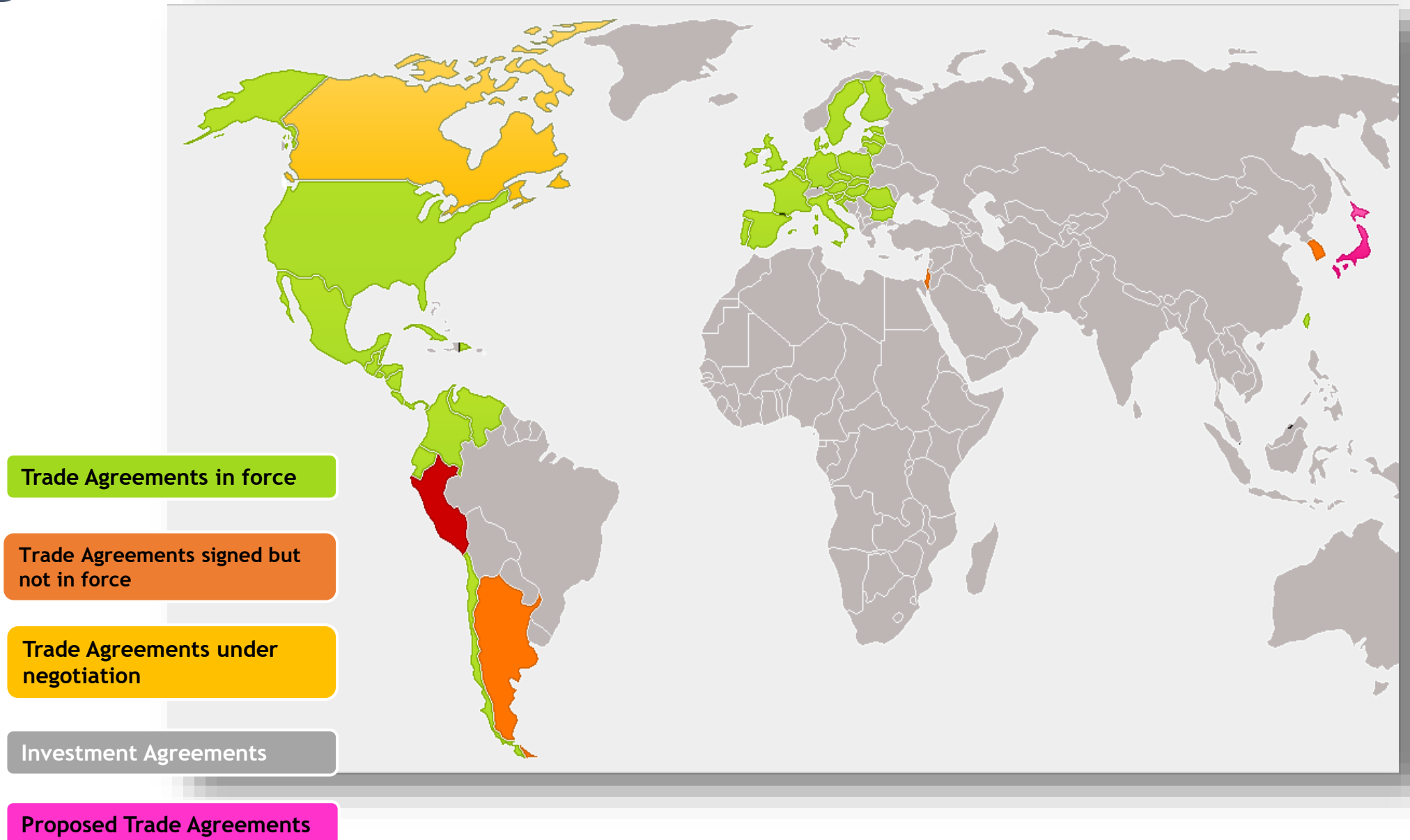
Destination Markets

Main destinations of exports for 2015	
USA	US\$3,753.9 mill (34.9%)
Central America	US\$3,115.6 mill (29.0%)
Eurozone	US\$727.5 mill (6.8%)
Mexico	US\$429.8 mill (4.0%)
Panama	US\$261.6 mill (2.4%)
Other	22.9% from the total

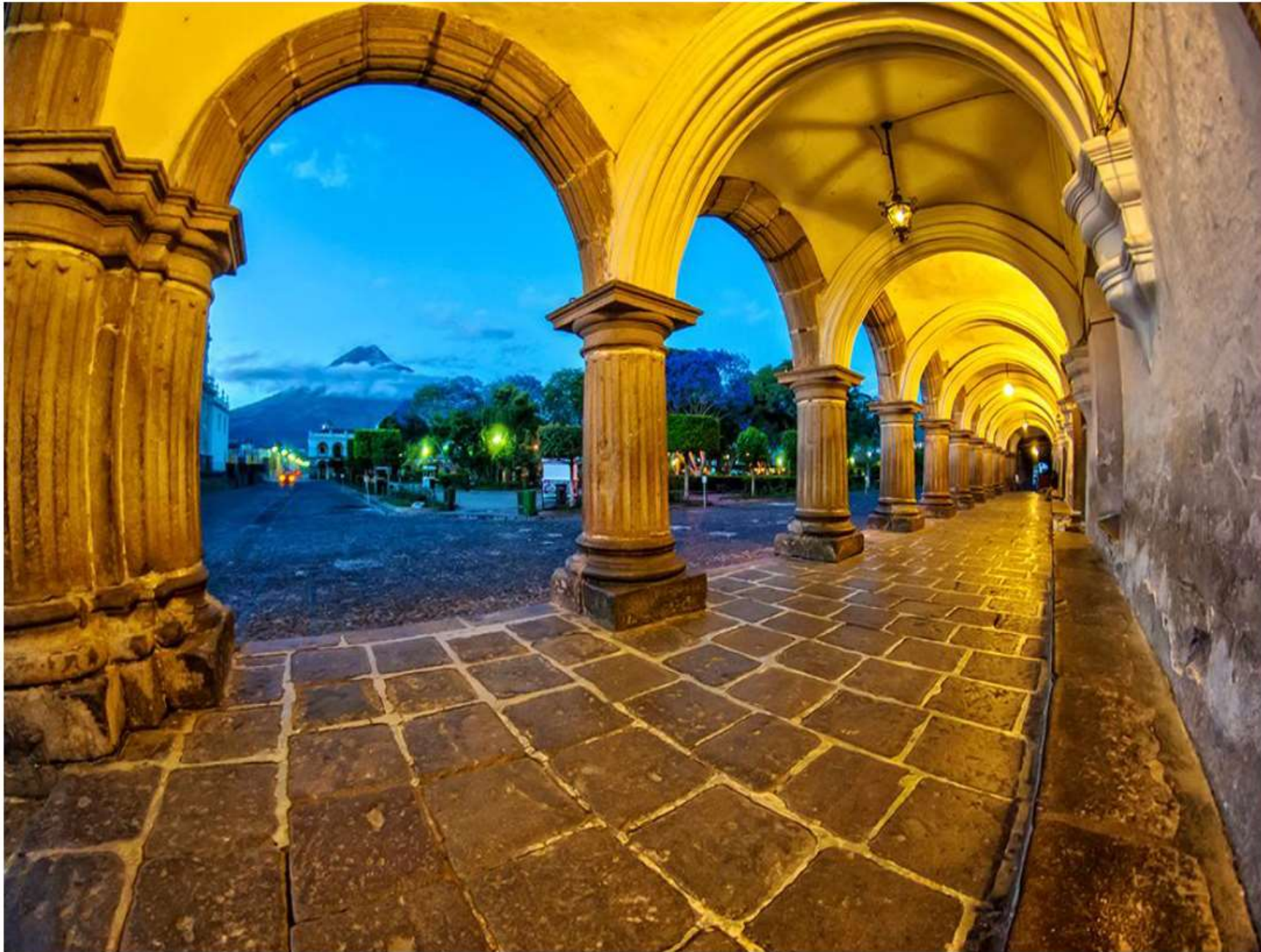
Exports Platform

- US\$100 Mill annually on software and visual effects
- 1st. Exporter of Snow Peas to the US
- 1st. Exporter of cardamom
- 1st. Exporter of cutting poinsettia
- 1st. Provider of wooden keys for Yamaha and Gibson guitars
- 1st. Supplier of manufactures of the Central American Region
- 1st. Coffee supplier to Starbucks Coffee and 3rd. Provider to Japan
- 2nd. Sugar exporter in Latin America
- 8th. World Exporter of Bananas

Trade Agreements



Source: Invest in Guatemala

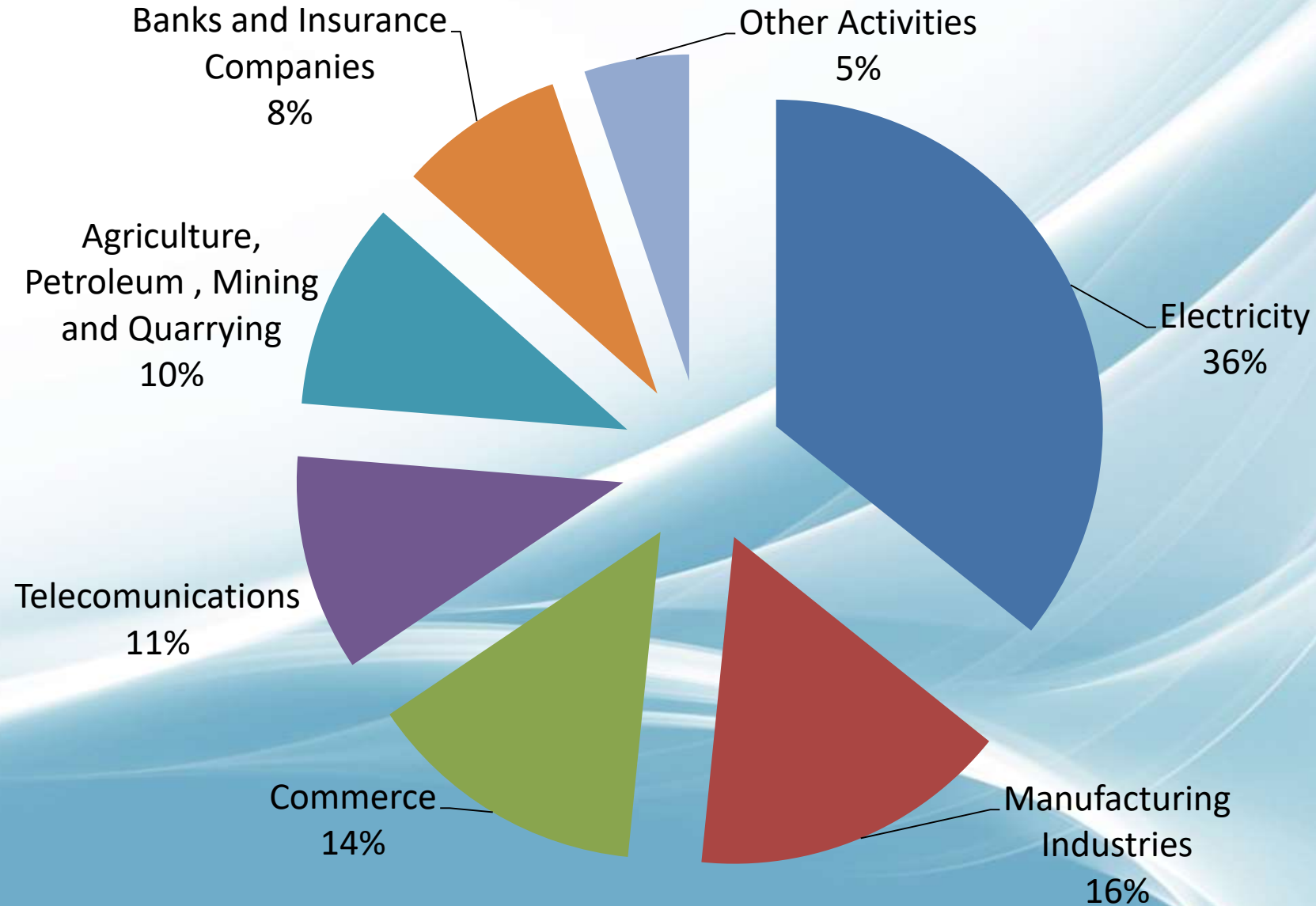


Palacio de los Capitanes, La Antigua Guatemala

Guatemala
Corazón del Mundo Maya

Foreign Direct Investment by Sectors 2016

(total of \$13.19 billion (2016 est.))



Where to invest?

1. Call Centers and Business Process Outsourcing
2. Food Industry
3. Light Manufacturing
4. Energy & Oil
5. Mining
6. Garments and Textiles
7. Tourism
8. Forestry
9. Infrastructure



3 reasons to choose
Guatemala as an incredible
destiny to sell!

BPO (Business Process Outsourcing)

- One of the sectors with the highest employment generation today.
- Currently this sector provides more than 18,800 customer service positions.
- 70 companies established in Guatemala.
- 20 companies export services to the United States , Spain and Central America.
- Guatemala has a flexible and competitive Legislation telecommunications, with great advantages in terms of infrastructure in Latin America .



Food Industry

- One of the largest industries in the country for logistics and support activity around it boasts levels of excellence that exceed the expectations of investors.
- Success stories: Ambev , Bimbo and Lala, among others.
- The sector directly employs over 75,000 people , and 353,000 indirect jobs.



Light Manufacturing

- We are seeking to position the country as a world-class investment destination for:
 - Electronics manufacturing
 - Refrigeration equipment
 - auto parts
 - plastics
 - pharmaceutical products
 - medical devices
 - cosmetics
 - software development



Energy & Oil



- Guatemala is one of the few countries in Latin America that allows private companies to extract and sell hydrocarbons in national territory.
- Also we have a Law of Incentives for the Development of Renewable Energy Projects, having around 70% of new electricity projects related to renewable energy.
- For the first quarter of 2015, the energy sector accounted US\$ 79.6 millions from US and Colombia.
- Recognized worldwide companies present in this sector ENEL, Perenco, among others.

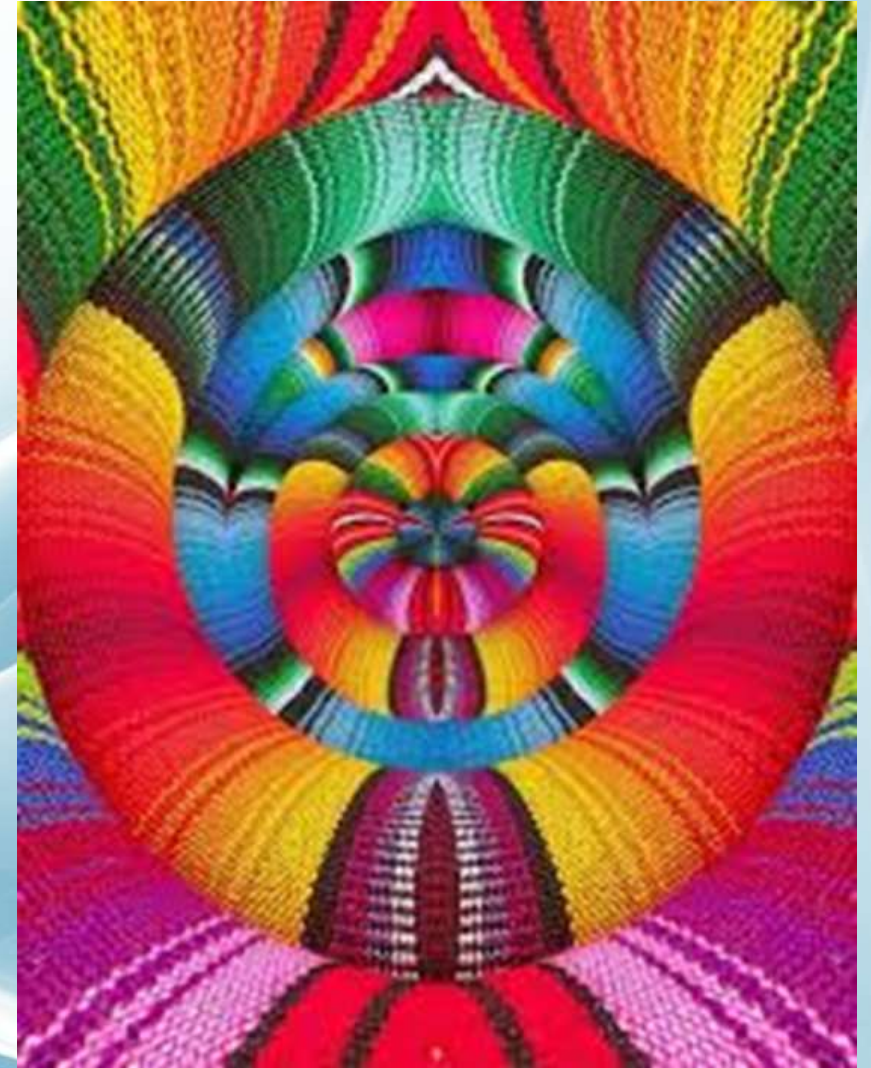
Mining



- Guatemala has large deposits of minerals such as nickel, gold and other light materials.
- Additionally jade deposits that exist in Guatemala are unique in the world.
- Total national mining production in 2014 add up to Q.5,926.4 millions.
- Guatemala is the first Central American country and the second in Latin America to be certified by the Extractive Industries Transparency Initiative (EITI) for its transparency and accountability.

Garments and Textiles

- Dynamic industry with a 70% growth during the last decade.
- Currently established as the best and most united cluster Central America.
- US\$ 1.470 millions exported in 2015
- This sector represents for 8.9 % of GDP and 19 % of industrial domestic production (industrial GDP).
- 46 % of the employees are women.



Tourism

- Guatemala is a country with all the features to achieve first world tourism.
- It has places and unparalleled views, spaces to generate extreme sport and the most privileged climate of the region .
- The " Land of Eternal Spring" had in 2015 with 3,142,398 international visitors and holds an annual growth of 7.1 % tourists (2013-2014).



Forestry

- Just over half the national territory in Guatemala has forest vocation.
- Presently Guatemala has 43.578 square kilometers of forest.
- The total forest production in 2012 was US \$ 754.4 million, a 77.4 % growth between 2001 and 2012.
- In 2014 exports amounted to US\$ 448,622,878.32
- The main markets are the United States, Mexico, El Salvador and Honduras.



Infrastructure

- Guatemala has a geographical location and natural conditions to establish itself as Regional Logistics and Services Center.
- Its infrastructure consists of roads, ports efficient certified quality and safety in the Atlantic and Pacific oceans , with a new modern airport in the heart of the city of Guatemala , as well as modern technological infrastructure. Currently the infrastructure sector accounts for 3 % of GDP in Guatemala .



WAMOS
AIR

Avianca

AEROMEXICO

CopaAirlines

IBERIA



Laguna de Ipala, Chiquimula

Guatemala
Corazón del Mundo Maya

Links of interest

Ministry of Economy

www.mineco.gob.gt, PBX (502) 2412-0200.

Administration Office of Foreign Trade of the Ministry of Economy

<http://portaldace.mineco.gob.gt>, PBX (502) 24120200.

Bank of Guatemala

www.banguat.gob.gt, PBX (502) 2429-6000

www.Asisehace.gt It is a tool that provides information on the different administrative procedures in the country's institutions, in order to attract investment opportunities and improve competitiveness indicators at the international level. <http://guatemala.eregulations.org>,

Superintendency of Tax Administration

www.sat.gob.gt, PBX (502) 2329-7070

Vice-Ministry of Animal Health and Regulations -VISAR- the Ministry of Agriculture , Livestock and Food

<http://visar.maga.gob.gt>,

PBX (502) 2413-7000

Invest In Guatemala

www.investinguatemala.org, PBX (502) 2421-2464 y 2421-2490

Guatemala Chamber of Agriculture

www.camaradelagro.org, PBX (502) 2335-3003

Guatemalan Chamber of Construction

www.construguate.com, PBX (502) 2387-2727

Association of Chambers of Commerce Binational -ASCABI-

<http://www.ascabi.org>, PBX (502) 2385-3401

Central American Economic Integration Secretariat -SIECA-

www.sieca.int, PBX (502)2368-2151

Guatemalan Tourism Institute

www.inguat.gob.gt, PBX (502) 2421-2800

Chamber of Tourism of Guatemala

www.camtur.org, PBX (502) 2472-7356, 2472-7362, 2472-7363

Guatemalan Textile Association -VESTEX-

www.vestex.com.gt, PBX. (502) 2410-8323

Guatemalan Exporters Association

www.export.com.gt, PBX 2422-3400

Coordinating Committee of Agricultural, Commercial , Industrial and Financial -CACIF-

www.cacif.org.gt, PBX (502) 2201-0000

Commercial Attaches , Investment and Tourism Program -PACIT-

yaguilar.pacitguate@gmail.com,

PBX (502) 2422-3400 Ext: 3405

Commercial offices abroad :

Call Center: (502) 2414-4446

Guatemala Chamber of Industry

www.industriaguat.com , PBX (502) 2380-9000

Guatemala Chamber of Commerce

www.ccg.com.gt, PBX (502) 2417-2700

National Coffee Association -ANACAFE-

<http://www.anacafe.org>, PBX (502) 2311-1969

Sugar Association of Guatemala -ASAZGUA-

www.azucar.com.gt, PBX (502) 2386-2000



Guatemala

visitguatemala.com