

South Carolina Forestry Commission Forest Products Marketing Program



Market Report: Overview of Guatemala's Lumber Market

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Guatemala's Wood Products Market

FOREST RESOURCE

Forest cover represents 39.9% (4.3 million ha) of Guatemala's total territory [1], 37.8% of which falls within the national forest system, 23.1% in municipal and community forests, and 37.8% in private hands [2]. Most of these areas consist of broad-leaved tree forests (82%), whereas coniferous and mixed forests correspond to 10% and 8% of the total cover respectively [3]. It has been estimated that the country lost approximately 1% of its forest cover per year between 2006 and 2010, mainly due to expansion of agriculture, urbanization, forest fires and illegal logging [4].

FORESTRY PRODUCTION

According to the government's calculations, Guatemala produced roughly 521.2 thousand m³ of wood in 2008 [5]. However, it is also estimated that lawful logging only represents 30-50% of the total wood consumed by the country, which gives a range between 724.1 and 862.4 thousand m³ according to previous studies [2]. Half of Guatemala's wood production is used as biofuels, the other half is used in wood products manufacturing, mainly lumber (of pine species such as *Pinus maximinoii* and *Pinus oocarpa* in particular)[2] .

Lumber Imports into Guatemala: 2007-2016

Guatemala has observed a remarkable grow in lumber import over the past ten years. Increasing from \$10.3 million in 2007 to \$22.7 million in 2016 [6], for a 120.4% grow over this period (Figure 1). Throughout this period, four countries have accounted for almost 90% of all lumber exported into Guatemala: Chile, Uruguay, Brazil and the USA (Figure 2). Chile has clearly dominated the market, with imports representing 63.5% of the value traded since 2007 [6]. In a distant second place, Uruguay's share of lumber imports into the Central American nation amounted to 11.2%, whereas Brazil and USA's represented 8.2% and 6.8% respectively.

Figure 1. 2007 – 2016 Guatemala's Lumber Import

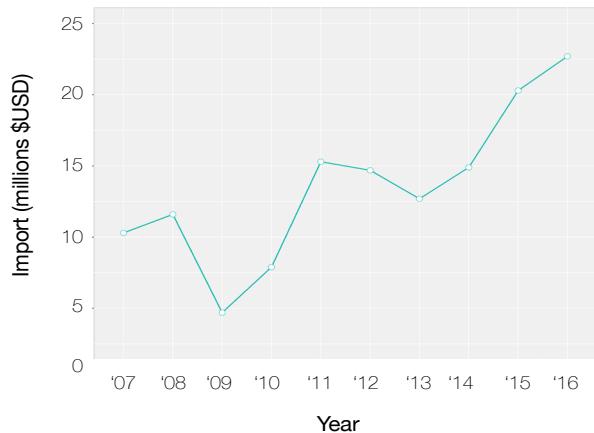
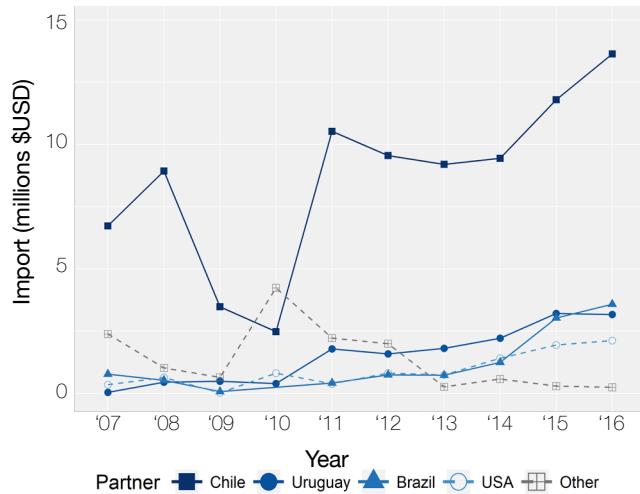
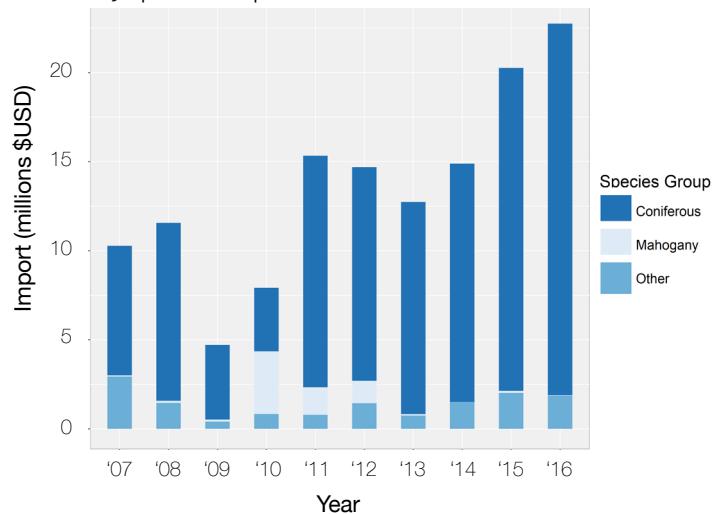


Figure 2. 2007 – 2016 Guatemala's Lumber Import
By Partner



Historic trade records indicate that Guatemala's lumber import mainly consists of coniferous species [6]. Between 2007 and 2016, these represented 84.6% of all lumber imported by the country (Figure 3). Mahogany is the only other species group with significant trade over this period (mostly between 2010 and 2012), accounting for 5.1% total lumber imports over the last ten years. Among the species groups included in the remaining 10.3% of import, red oak and maple can be cited.

Figure 3. 2007 – 2016 Guatemala's Lumber Import By Species Group



U.S. Lumber Exports into Guatemala

Between 2002 and 2010, average U.S. Lumber exports into Guatemala amounted to \$0.62 million per year. This contrast with remarkable figures observed in 2014, 2015 and 2016: \$1.4, \$1.9 and \$2.1 million respectively, for almost a 191.9% increase. Over the last seven years, 60% of all lumber exports from the U.S. into this Central American country originated from five states: Pennsylvania (14.1%), Alabama (13.7%), Georgia (12.9%), Kentucky (10.3%) and Indiana (8.1%). South Carolina accounted for only 0.3% of exports thorough this period. A wide selection of species have been seek by Guatemalan importers, but U.S. historic trade records indicate that varieties of Oak and coniferous species have led the market: 26.8% and 22.0% of all lumber imports form the U.S. since 2010.

Resources: Industry Directories

- Industry directory by Gremial Forestal, non-governmental organization promoter of sustainable management of Guatemalan forests (Spanish): <http://www.gremialforestal.com/nuestras.php>
- Industry directory by The Guatemalan Exporters Association (AGEXPORT): <http://export.com.gt/agexport/directorio/#/directorio/2/3/>

List of References

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- [3] Instituto Nacional de Bosques, "Primer Informe Nacional sobre el Estado de los Recursos Genéticos Forestales en Guatemala ['First National Report on the State of Forest Genetic Resources in Guatemala'],," Guatemala City, 2012.
- [4] O. Regalado, X. Villagrán, G. Pérez, E. Castellanos, G. Martínez, and D. Incer, "Mapa De Cobertura Forestal De Guatemala 2010 Y Dinámica De La Cobertura Forestal 2006-2010 ['Map of Forest Coverage of Guatemala 2010 and Dynamics of Forest Coverage 2006-2010],'," Guatemala City, 2012.
- [5] Instituto Nacional de Bosques, "Boletín de Estadística Forestal 2009 '2009 Bulletin Of Forestry Statistics,'" Guatemala City, 2009.
- [6] United Nations Department of Economic and Social Affairs Statistics Division, "United Nations Comtrade Database," 2017. [Online]. Available: <https://comtrade.un.org/>. [Accessed: 29-Jun-2017].