



Connecting Central America

Promoting sustainable exports
from Central American SMEs
to the European market



Taller de Capacitación:

8:00-11:30 a.m.

Tendencias del mercado,
oportunidades y requisitos de
acceso al mercado europeo para
el sector de cacao y derivados,
tendencias, oportunidades

13:30-17:30 p.m.

Cómo escribir su Plan de
Mercadeo y Exportación

Jörn Berger

Experto CBI Cacao y Chocolate
6 de Agosto 2019



Contenido

1 Estadísticas comerciales y macroeconómicas y su aplicación práctica-estratégica para la inteligencia comercial

2 Canales & segmentos del mercado global & Europeo con potencial para Guatemala y Centro América.
Competencia

3 Requisitos legales y privados en Europa y barreras de entrada

4 Tendencias de mercado en Europa

Conclusiones:
5 Oportunidades para el cacao fino guatemalteco



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CBI
Ministry of Foreign Affairs

¿Quiénes son ustedes?

- **Vínculo y cercanía con AGEXPORT?**

- Otras organizaciones de apoyo al sector?

Productos?

- Cacao en grano? (B2B)
- Semi-procesados de cacao? (B2B)
- Chocolate en barra? (B2C)

Ventas?

- Regional / Nacional?
- Intra-regional (Centro América)?
- EEUU?
- Europa?
- Otros continentes?

¿Quién soy yo?

Jörn Berger:

- Agricultura orgánica 1991 – 1994
- Universidad de agronomía orgánica en el trópico y subtropico 1994 - 1999
- Auditor y certificador orgánico Europa, Asia, África, Latino América 1999-2008
- Entrenador de emprendimiento
- Consultor internacional independiente para mercados orgánicos y cadenas de valor (ITC, SECO, UNEP, GIZ, empresas privadas, gobiernos y otros)
- Entrenador y consultor para CBI desde 2012
- Implementación RSE, análisis de cadenas de valor Perú, Colombia (Cacao, Ingredientes Naturales, granos, frutas y otros)
- Experto CBI para cacao & chocolate (Perú, Guatemala, El Salvador, Nicaragua, Costa Rica, Liberia)





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CBI
Ministry of Foreign Affairs

About CBI

- Centre for the Promotion of Imports from developing countries
- Established in 1971 by the Dutch Ministry of Foreign Affairs
- Since 2015 part of the Netherlands Enterprise Agency (RVO.nl)
- CBI aims at strengthening the competitiveness of companies in those countries on international markets, primarily the West-European market, by improving conditions in enterprises and business support organisations. CBI considers social values and compliance with the most relevant environmental requirements to be an integral part of its policy and activities





Oportunidades de negocio & inteligencia del mercado



Home Export to Europe Import from a developing country Collaborate with us **Market Information**

Home > Market Information > Cacao

Exporting cacao to Europe

The European market offers opportunities for cacao exporters. Here you'll find the information you need to help you get your cacao on the European market.

Sector information

- › What requirements should your product comply with?
- › Through what channels can you get your product onto the European market?
- › Which trends offer opportunities?
- › What is the demand?

Tips

- › 10 tips to do business
- › 11 tips to find buyers

Promising markets

- › Switzerland
- › Belgium
- › Netherlands
- › Germany
- › France
- › United Kingdom

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Promising export products

- › Fine flavour cocoa
- › Certified cocoa
- › Semi-finished cocoa products

Other sources

- [International Cacao Organization \(ICCO\)](#)
- Daily Prices of Cocoa Beans and other statistics
- [ITC Standards Map](#)
- Information about voluntary standards for cocoa
- [ITC Trade Map](#)
- Data about worldwide import and export of cacao



Estadísticas comerciales y macroeconómicas

Production / Consumption

Cocoa Production in 1,000 tonnes 2017/18

Domestic consumption in 1,000 tonnes 2015/16

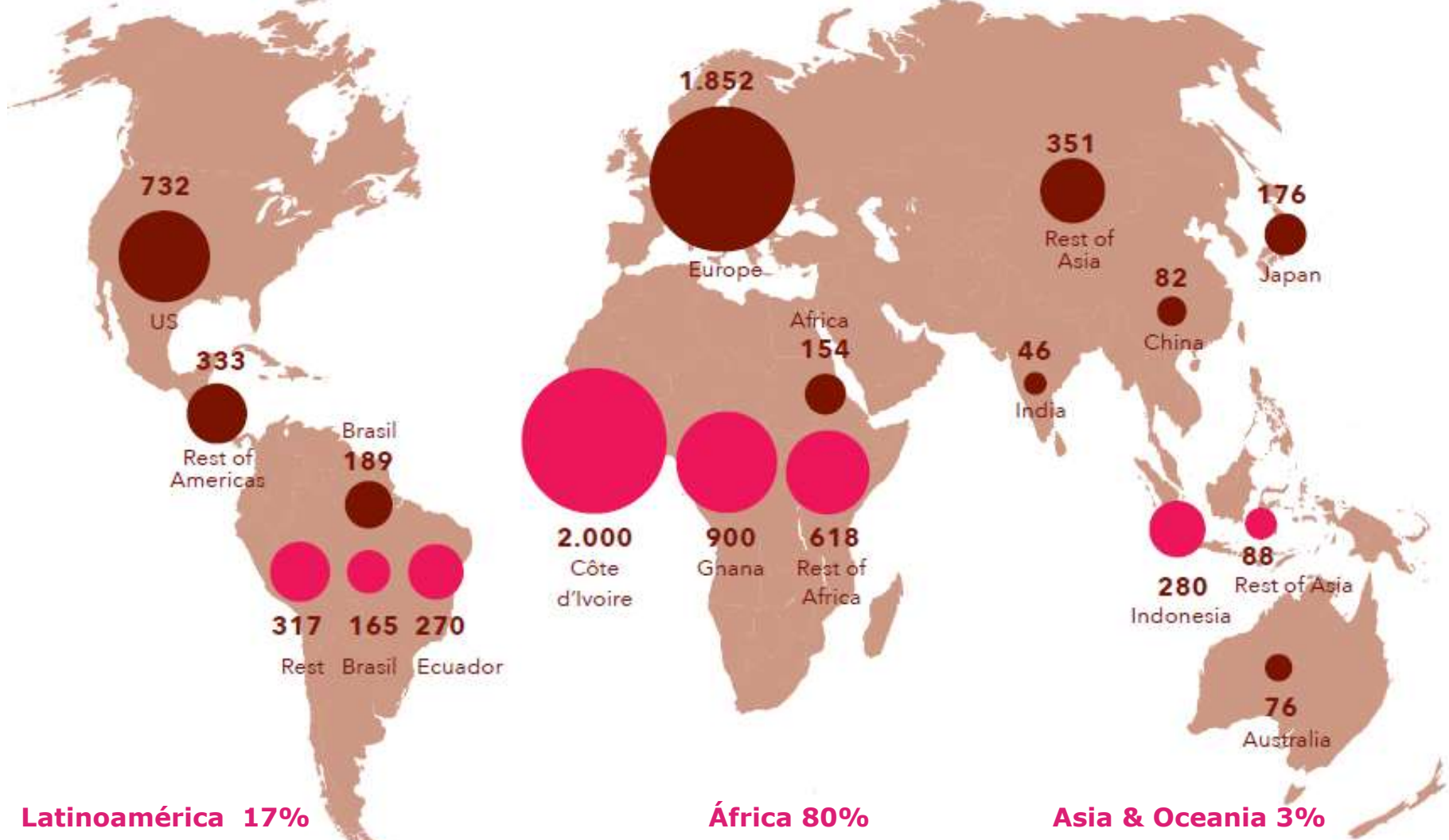
Source: ICCO 2018, Table 2, 40

Las Américas 31%

Europa 46%

África 4%

Asia & Oceania 18%



Latinoamérica 17%

África 80%

Asia & Oceania 3%

Fuente: Cocoa Barometer 2018

Principales países exportadores de granos de cacao

	Exporters	Exported value in 2014	Exported value in 2015	Exported value in 2016	Exported value in 2017	Exported value in 2018
	World	9798851	10224404	9211906	8688056	9440963
1	Côte d'Ivoire	3045103	3553796	3037015	3475845	3258527
2	Ghana			1886219	1642052	2437194
3	Ecuador	587528	705415	621970	589750	665177
4	Cameroon	563632	767181	669606	403021	520327
5	Belgium	435318	531208	613470	612404	496052
6	Netherlands	609913	525003	439977	522955	443945
7	Malaysia	293041	226283	276486	314823	353469
8	Nigeria	598844	451015	238277	178740	256066
9	Dominican Republic	212116	250787	227941	134361	194413
10	Peru	152842	192362	202326	148357	154902
11	Papua New Guinea	129317	137122	155501	82657	83819
12	Estonia	122741	129745	124097	121211	75341
13	Indonesia	196492	114978	83967	53537	72443
14	Uganda	59429	56684	74996	54208	64695
15	Sierra Leone	1266	61275	17448	14461	31627
16	Germany	58835	64337	56269	47863	29199
17	Venezuela, Bolivarian Republic of	22061	31910	29905	24201	28164
18	Togo	29303	24607	11379	3907	21609
19	United States of America	143883	49423	82979	65278	21124
20	Congo, Democratic Republic of the	7582	15004	18806	28436	20744
21	Madagascar	20001	23538	22452	22785	19524
22	Liberia				4958	18956
23	Canada	2374	1738	2101	814	18624
24	Tanzania, United Republic of	22139	23159	21236	16752	18365
25	Colombia	24353	41740	31580	27326	16780

Principales países exportadores de granos de cacao

Exporters	Exported value in 2014	Exported value in 2015	Exported value in 2016	Exported value in 2017	Exported value in 2018
26 Guinea	5551	18883	39245	15715	16161
27 Solomon Islands	12923	11357	12628	4417	8642
28 Sao Tome and Principe	9335	8000	8651	8371	7975
29 Congo	751			886	7694
30 Philippines	4460	5731	7391	8379	7643
31 Nicaragua	4225	7065	5764	5946	6980
32 Haiti	2999	4120	10181	4232	6378
33 France	34468	17258	5156	2665	6098
34 Turkey	8507	6961	9223	3128	5183
35 Cuba	1186	547	401	277	4766
36 Viet Nam	6216	8334	9147	4223	4698
37 Italy	1487	328	190	1755	4297
38 Grenada	1634	3760	1322	2360	3277
39 Vanuatu	4725	3973	4525	5363	3075
40 Panama	4056	1904	2030	0	2798
41 Brazil	2039	21018	1634	2936	2653
42 United Kingdom	2371	2383	1279	1700	2422
43 Mexico	873	460	866	2811	2051
44 Switzerland	1634	1645	1899	1490	2034
45 Honduras	823	1304	1397	1985	1939
46 Equatorial Guinea	1749	2400	928	1876	1787
47 Trinidad and Tobago	1862	1758	1627	1910	1347
48 Costa Rica	929	769	1341	1343	1233
49 Bolivia, Plurinational State of	341	1396	655	940	1139
50 Poland	46	6788	334	1087	903

Principales países exportadores de granos de cacao

Exporters	Exported value in 2014	Exported value in 2015	Exported value in 2016	Exported value in 2017	Exported value in 2018
51 Thailand	0	0	10	1	752
52 Jamaica	1623	558	902	430	694
53 Spain	95	15663	28	33	638
54 Belize	237	507	567	514	578
55 Guatemala	67	295	325	1901	492
56 Tokelau	86	266	294	483	367
57 Russian Federation	3	1947	1016	170	339
58 India	249	13521	79	363	332
59 Korea, Republic of	0	0	2	123	279
60 Dominica		179	3561	3169	265
61 Samoa	13	150	24	215	261
62 Austria	236	140	195	172	149
63 Bulgaria	42	101	390	203	138
64 Japan	231	5	93	0	126
65 Singapore	733	267	13579	628	125
66 Bahrain	0	0	4	0	112
67 Portugal	0	1	5	36	78
68 Saint Lucia	89	196	114	122	73
69 Saint Vincent and the Grenadines	0	0	0	3	71
70 Czech Republic	130	83	91	52	68
71 Pitcairn		39	326	127	66
72 Denmark	23	7	6	25	61
73 Bosnia and Herzegovina	85	0	0	60	60
74 Slovenia	34	41	218	139	56
75 Gabon	148	27	1378	303	49

Principales países importadores de granos de cacao

Importers	Imported value in 2014	Imported value in 2015	Imported value in 2016	Imported value in 2017	Imported value in 2018
World	49.114.687	46.202.435	48.627.332	48.224.952	49.947.839
Germany	5.050.999	4.675.866	5.003.776	4.886.482	5.222.327
Netherlands	4.195.246	4.222.135	4.701.782	4.665.384	4.874.039
United States of America	4.851.677	4.983.867	5.208.799	5.145.881	4.856.588
France	3.447.681	3.181.522	3.367.824	3.377.124	3.460.065
United Kingdom	2.776.395	2.638.517	2.517.449	2.630.436	2.777.689
Belgium	2.521.978	2.363.672	2.857.724	2.614.070	2.460.269
Canada	1.479.597	1.503.315	1.543.603	1.521.960	1.553.634
Poland	1.006.536	1.078.292	1.133.996	1.224.283	1.324.682
Italy	1.288.752	1.230.365	1.269.315	1.289.683	1.269.388
Russian Federation	1.368.553	991.148	971.057	1.048.556	1.179.825
Spain	1.215.593	1.115.987	1.213.456	1.187.510	1.124.731
Malaysia	1.312.338	1.088.069	1.024.405	1.012.964	1.085.551
Japan	1.053.763	953.595	1.035.960	1.013.316	1.015.125
China	870.943	872.751	685.521	659.890	786.386
United Arab Emirates	545.746	499.369	516.862	559.931	710.087
Indonesia	469.005	293.780	350.372	646.337	706.787
Australia	704.373	720.142	685.227	731.278	688.540
Austria	661.455	605.991	636.564	578.332	653.273
Switzerland	645.593	624.744	618.575	613.132	610.517
Singapore	633.533	602.899	597.871	494.146	562.955

Valores unitarios de granos de cacao

Exporters	2014	2015	2016	2017	2018	Exported value in 2018, US Dollar thousand	Exported quantity in 2018, Tons
	Exported unit value, US Dollar/Tons	Exported unit value, US Dollar/Tons	Exported unit value, US Dollar/Tons	Exported unit value, US Dollar/Tons	Exported unit value, US Dollar/Tons		
World	3.074	2.999	3.109		2.381	9.440.963	3.964.816
Sri Lanka	3.014	6.417	7.250	4.370	11.300	46	4
Bulgaria	14.000	12.625	11.818	11.278	10.615	138	13
Tokelau	17.200	15.647	10.889	9.857	8.988	367	42
Samoa	1.625	4.839	2.400	3.583	7.457	261	35
Saint Lucia	4.450	7.538	6.000	6.778	7.300	73	10
Australia	14.000	10.667	7.684	8.200	7.000	35	5
Denmark	958			8.333	6.778	61	9
Saint Vincent and the Grenadines				3.000	6.455	71	11
Trinidad and Tobago	4.874	5.186	5.215	6.063	6.068	1.347	222
Sweden	9.500	8.400	4.882	2.667	6.000	6	1
France	3.982	4.155	3.736	3.936	5.594	6.098	1.090
El Salvador	4.286	3.414	4.222	4.091	5.500	44	8
Bolivia, Plurinational State of	5.500	7.051	5.696	5.027	4.909	1.139	232
Dominica		3.442	3.168	3.494	4.649	265	57
United Arab Emirates	3.485		1.000		4.500	9	2
Belize	2.043	2.654	2.675	2.904	4.481	578	129
Mexico	4.157	3.433	5.124	2.724	4.309	2.051	476
Brazil	4.070	3.077	4.201	3.894	4.307	2.653	616
Switzerland	5.815	6.184	5.737	5.913	4.185	2.034	486
India	2.929	3.065	4.647	3.862	4.049	332	82

Valores unitarios de granos de cacao - 2

Exporters	2014	2015	2016	2017	2018	Exported value in 2018, US Dollar thousand	Exported quantity in 2018, Tons
	Exported unit value, US Dollar/Tons	Exported unit value, US Dollar/Tons	Exported unit value, US Dollar/Tons	Exported unit value, US Dollar/Tons	Exported unit value, US Dollar/Tons		
Ukraine					4.000	4	1
Portugal		1.000	5.000	3.000	3.714	78	21
Jamaica	3.639	3.695	3.697	4.175	3.672	694	189
Grenada	3.827	3.760	3.583	3.343	3.629	3.277	903
Poland	5.750	2.971	6.680	5.813	3.627	903	249
Norway				6.000	3.500	14	4
Viet Nam		2.966	3.100		3.399	4.698	1.382
Costa Rica	2.749	3.004	3.271	3.094	3.369	1.233	366
Italy	3.411	2.216	3.800	2.359	3.360	4.297	1.279
Honduras	1.544	1.746	2.421	2.284	3.343	1.939	580
Guatemala	1.426	4.470	4.452	12.758	3.280	492	150
Panama	4.151	3.755	4.044		3.273	2.798	855
United States of America	3.037	3.167	2.974	3.212	3.261	21.124	6.478
South Africa	5.600	7.333	4.500	8.500	3.250	13	4
Cuba	3.562	3.852	3.748	4.014	3.207	4.766	1.486
United Kingdom	2.751	3.405	2.739	3.818	3.169	2.422	764
Gabon	3.083	3.000	2.989	2.405	3.063	49	16
Brunei Darussalam					3.000	3	1
Dominican Republic	3.110	3.151	3.092	2.654	2.974	194.413	65.379
Germany	3.250	3.318	3.251	2.880	2.946	29.199	9.910
Ghana			3.244	2.864	2.889	2.437.194	843.641
Fiji	5.000	4.000	2.400	4.100	2.875	23	8
Netherlands	3.092	3.051	3.174	3.016	2.746	443.945	161.644
Haiti	2.510	2.534	4.064	1.897	2.726	6.378	2.340
Venezuela, Bolivarian Republic of	3.235	3.495	3.712	2.936	2.632	28.164	10.702
Russian Federation	3.000	1.937	3.655	3.542	2.628	339	129

Valores unitarios de granos de cacao - 3

Exporters	2014	2015	2016	2017	2018	Exported value in 2018, US Dollar thousand	Exported quantity in 2018, Tons
	Exported unit value, US Dollar/Tons	Exported unit value, US Dollar/Tons	Exported unit value, US Dollar/Tons	Exported unit value, US Dollar/Tons	Exported unit value, US Dollar/Tons		
Belgium	3.214	3.296	3.277	2.627	2.624	496.052	189.062
Sao Tome and Principe	2.924	2.863	2.883	2.391	2.619	7.975	3.045
Bosnia and Herzegovina	3.542			3.333	2.609	60	23
Singapore	3.016	3.608	3.712	2.661	2.604	125	48
Indonesia	3.102	2.902	2.964	2.133	2.603	72.443	27.827
Thailand			3.333		2.602	752	289
Peru	3.236	3.252	3.259	2.554	2.577	154.902	60.101
Estonia	2.905	3.080	3.252	2.557	2.562	75.341	29.403
Japan	3.726	5.000	1.898		2.520	126	50
Turkey	3.736	3.722	3.538	2.993	2.514	5.183	2.062
Israel				2.000	2.500	10	4
Philippines	2.257	3.010	2.965	2.438	2.490	7.643	3.069
Pitcairn		3.545	3.105	2.048	2.444	66	27
Congo, Democratic Republic of the	2.968	3.144	3.204	2.291	2.407	20.744	8.617
Colombia	3.037	3.037	3.022	2.301	2.378	16.780	7.056
Papua New Guinea	3.135	3.221	3.079	2.210	2.309	83.819	36.308
Togo	3.047	2.531	2.594	797	2.304	21.609	9.377
Malaysia	3.132	3.174	3.035	2.167	2.272	353.469	155.572
Ecuador	2.954	2.988	2.737	2.073	2.262	665.177	294.063
Vanuatu	3.102	3.163	2.848	2.128	2.254	3.075	1.364
Sierra Leone	3.526	13.763	1.704	118	2.224	31.627	14.218
Congo	915			891	2.183	7.694	3.524
Côte d'Ivoire	2.726	2.763	2.877	2.302	2.136	3.258.527	1.525.594
Cameroon	2.926	3.220	2.539	1.818	2.114	520.327	246.166
Uganda	2.291	2.268	2.525	1.969	2.103	64.695	30.770

Valores unitarios de granos de cacao - 3

Exporters	2014	2015	2016	2017	2018	Exported value in 2018, US Dollar thousand	Exported quantity in 2018, Tons
	Exported unit value, US Dollar/Tons	Exported unit value, US Dollar/Tons	Exported unit value, US Dollar/Tons	Exported unit value, US Dollar/Tons	Exported unit value, US Dollar/Tons		
Canada	1.893		3.099	2.423	2.076	18.624	8.970
Guinea	852	826	2.976	2.417	2.050	16.161	7.884
Madagascar	2.402	2.388	2.459	1.884	2.020	19.524	9.666
Liberia				1.601	2.013	18.956	9.417
Equatorial Guinea	2.839	2.974	2.864	2.166	1.861	1.787	960
Tanzania, United Republic of	2.008	2.047	2.292	1.661	1.808	18.365	10.157
Spain	2.568	3.288	7.000	5.500	1.792	638	356
Nicaragua	2.002	1.810	1.823	1.382	1.739	6.980	4.013
Nigeria	13.254				1.725	256.066	148.419
Solomon Islands	2.602	2.406	2.403	1.059	1.712	8.642	5.048
Macedonia, North				1.200	1.571	22	14
Romania	3.000	3.000			1.538	20	13
Austria	2.484	2.545	1.912	1.792	1.319	149	113
Niger		250	333	759		22	20
Saudi Arabia			3.382		1.077	14	13
China	3.176	3.280	2.820	2.305	964	27	28



Tarea: investigación propia en el sistema www.trademap.org

- ¿A qué países destinos se se dirigen exportaciones de granos de cacao con precios interesantes?



El balance comercial Guatemalteco de productos de cacao y sub-productos es negativo en 2018 (más importación que exportación)

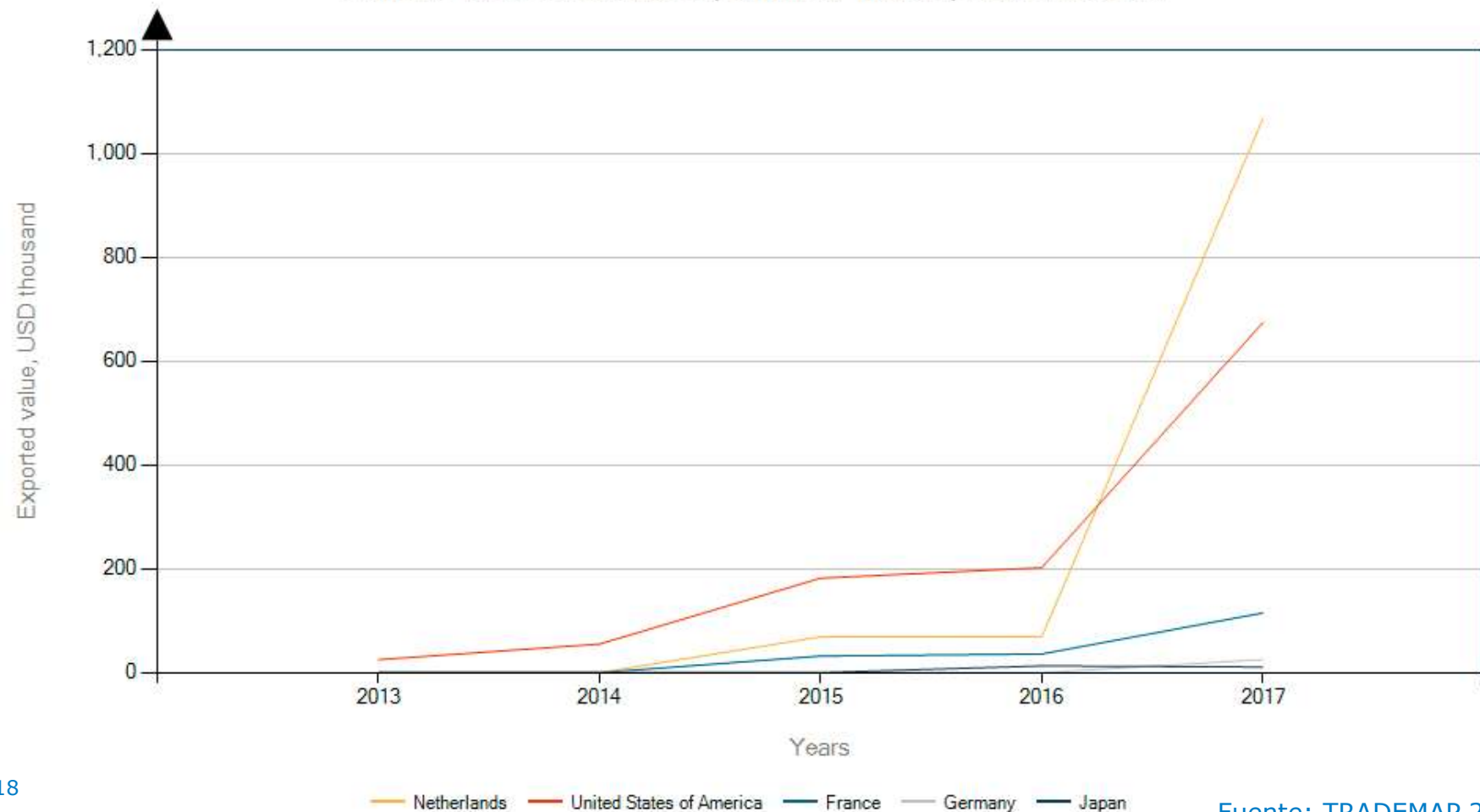
Importers	Value exported in 2018 (USD thousand)	
	Value exported in 2018 (USD thousand)	Trade balance 2018 (USD thousand)
Total	10.036	- 24.693
United States of America	1.404	- 12.940
Mexico	335	- 8.587
Belgium	29	- 179
Germany	20	- 727
Chile	6	- 213
Switzerland	1	- 73
Spain	1	- 1.360
Romania		- 6
Denmark		- 14
United Kingdom		- 15
Brazil		- 23
India		- 38
Poland		- 60
Peru		- 61
Malaysia		- 100
Singapore		- 104
Italy		- 126
Colombia		- 668
China		- 669
Ecuador		- 979
Turkey		- 1.023
Netherlands		- 1.482

- **Granos déficit**
Nicaragua (719.000 US\$), Honduras (30.000 US\$)
- **Pasta déficit**
Ecuador (503.000 US\$), México (183.000 US\$)
- **Manteca déficit**
Ecuador (273.000 US\$), México (128.000 US\$), Malaysia (25.000 US\$), Costa Rica (14.000 US\$)
- **Polvo déficit**
Holanda (1.481.000 US\$), EE.UU. (1.194.000 US\$), España (1.152.000 US\$), México (428.000 US\$), Ecuador (192.000 US\$), Malaysia (62.000 US\$), Costa Rica (30.000 US\$)
- **Chocolate déficit**
EE.UU. (12.056.000 US\$), México (7.848.000 US\$), Chile (213.000 US\$), Suiza (74.000 US\$) y otros...

Code	Official product description
1801	Cocoa beans, whole or broken, raw or roasted
1803	Cocoa paste, whether or not defatted
1804	Cocoa butter, fat and oil
1805	Cocoa powder, not containing added sugar or sweetening matter
1806	Chocolate and other food preparations containing cocoa

Exportaciones Guatemaltecas de cacao en grano

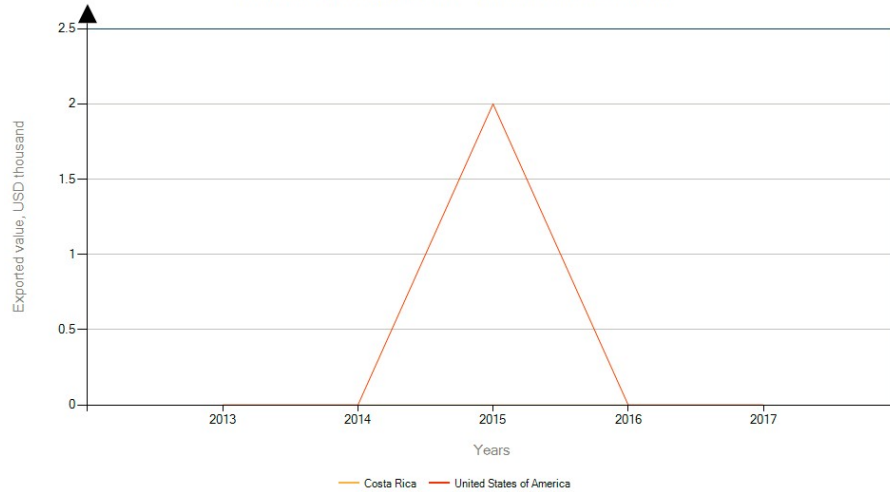
List of importing markets for a product exported by Guatemala
Product: 1801 Cocoa beans, whole or broken, raw or roasted



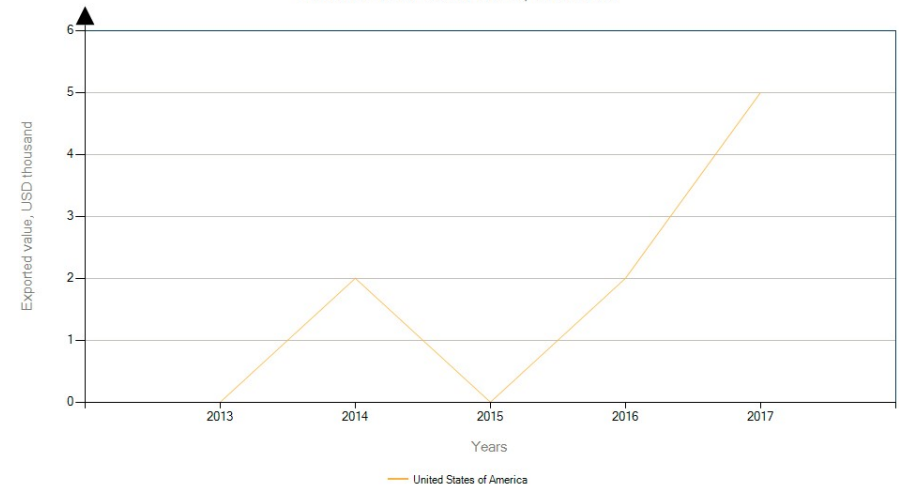


Exportaciones Guatemaltecas de derivados de cacao

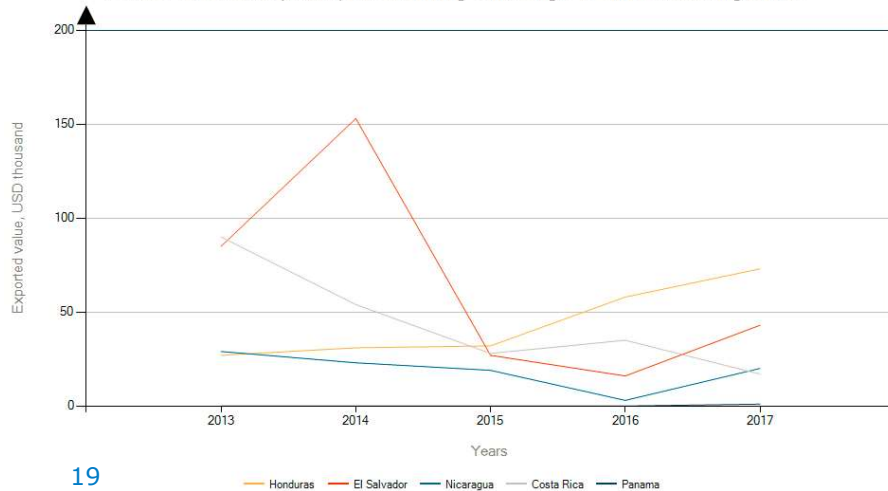
List of importing markets for a product exported by Guatemala
Product: 1803 Cocoa paste, whether or not defatted



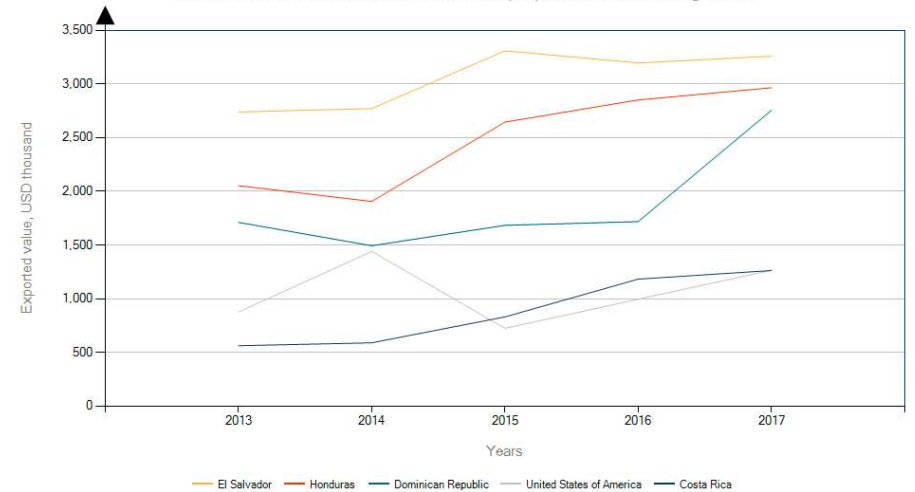
List of importing markets for a product exported by Guatemala
Product: 1804 Cocoa butter, fat and oil



List of importing markets for a product exported by Guatemala
Product: 1805 Cocoa powder, not containing added sugar or other sweetening matter



List of importing markets for a product exported by Guatemala
Product: 1806 Chocolate and other food preparations containing cocoa



Estimaciones de la Producción de Cacao en Guatemala

- Producción nacional: Entre 1,500 y 2,000 toneladas métricas anuales.
- Un área cultivada de alrededor de 5,000 hectáreas.
- 80% de los productores son pequeños, en su mayoría con plantaciones menores a 1 hectárea y en algunos casos con plantaciones de hasta 5 hectáreas.
- 20% de productores son medianos, con plantaciones de:
 - 5 – 45 hectáreas
 - 45 – 90 hectáreas.
- Muy bajo % de plantaciones con certificación orgánica.
- No existen datos oficiales sobre consumo per cápita.

Exportaciones de Cacao Guatemalteco

EXTRA REGIONALES

AÑO	2015	2016	2017	2018
VOLUMEN (t)	31.7	34.7	56.5	38.5
VALOR FOB (\$/t)	163,400.0	173,200.0	291,100.0	169,300.0
PRECIO PROMEDIO (\$/t)	5,154.6	4,991.4	5,152.2	4,397.4
Reino Unido, Países Bajos, Italia, Francia, Bélgica, Alemania, Canadá, USA, Japón, Corea del Sur y Taiwan.				

TOTALES

AÑO	2015	2016	2017	2018
VOLUMEN (t)	43.1	47.1	88.1	93
VALOR FOB (\$/t)	174,000.0	178,000.0	298,800.0	192,100.0
PRECIO PROMEDIO (\$/t)	4,037.1	3,779.2	3,391.6	2,065.6
A la exportacion extra regional se adicionan exportaciones hacia El Salvador principalmente.				

Sistema de Estadísticas de Comercio de Centroamérica (SEC)

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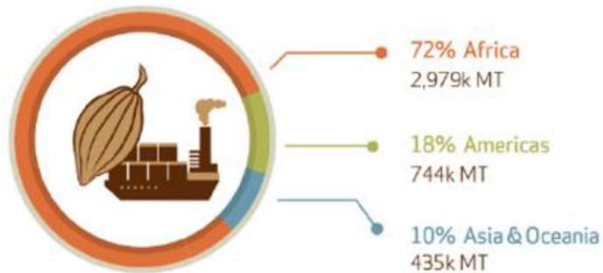
Exportaciones de Cacao de Guatemala

Mecanismos actuales para generar mayor oferta de cacao fino:

- Especialización y tecnificación del manejo agronómico.
- Especialización de la cosecha y postcosecha.
- Estrategia nacional de cacao – Ministerio de Agricultura.
- Participación en competencias internacionales y regionales de calidad.
- Marca colectiva regional CUNAKakaw.
- Otros.

Principales países refinadores de cacao a nivel global

WORLD COCOA PRODUCTION
2014/15: 4,158k MT

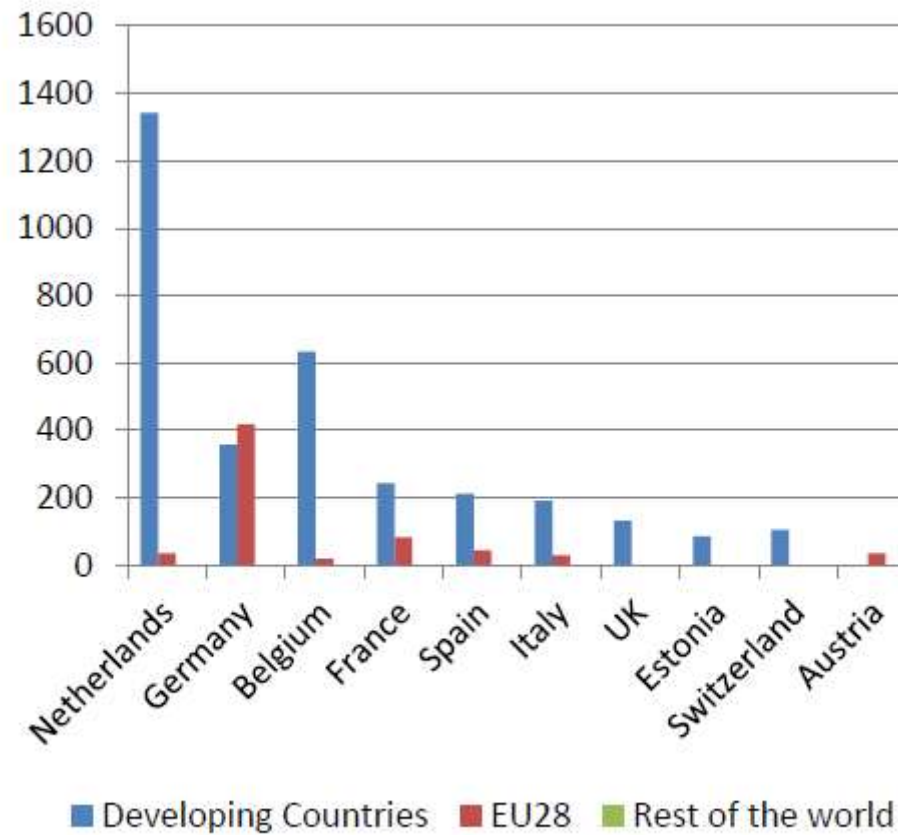


WORLD COCOA GRINDING
2014/15: 4,131k MT



Principales importadores de cacao en Europa

Figure 7: Value of EU28 imports of cocoa beans by main importing country, 2014, in € million



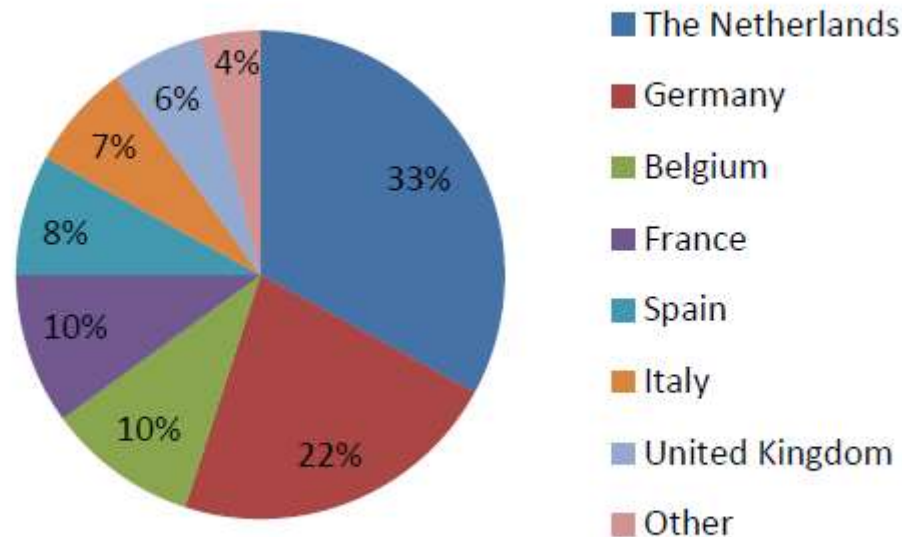
Source: ITC Trade Map, 2015



Procesamiento
¿Cuánto derivados de cacao
produce Europa y
cuáles son las tendencias?

Principales países refinadores de cacao en Europa

Figure 4: Grinding shares of European countries, 2014, in %



Source: Eurostat, 2014





Conclusiones

¿Vemos oportunidades (o desafíos) para los exportadores guatemaltecos de cacao fino y derivados en estas estadísticas?



Conclusiones para la implementación en el propio trabajo





Our partners in Guatemala

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