



VESTEX

Asociación de la Industria del Vestuario y Textiles

GUATEMALA'S APPAREL & TEXTILE INDUSTRY February 2017

GUATEMALA DELIVERS

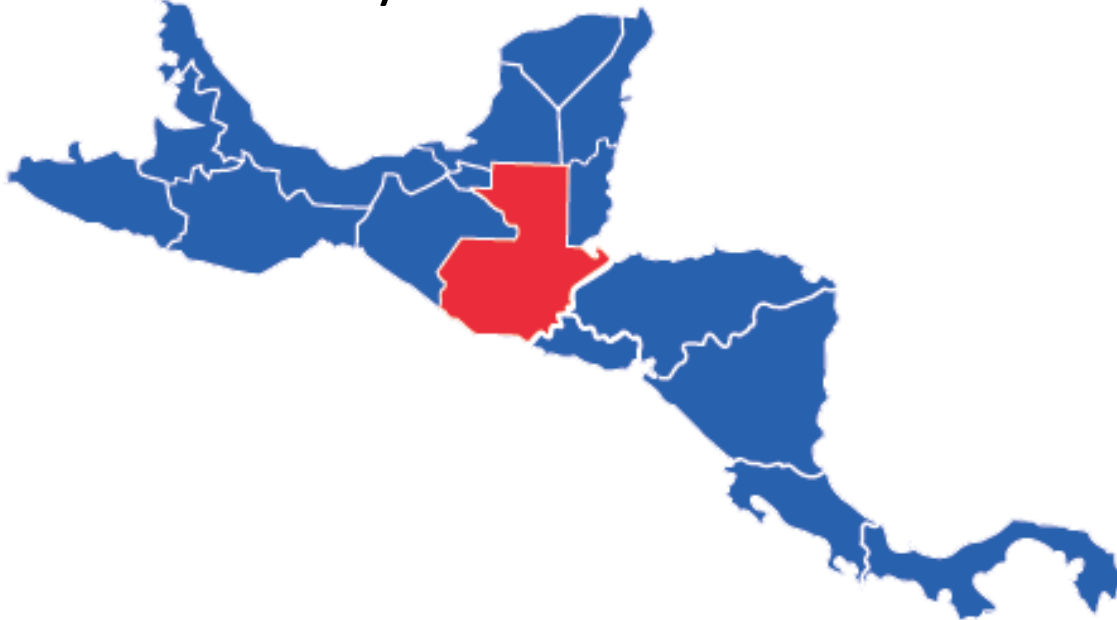
Our competitive advantage: Quick Response



Country: Guatemala



- Guatemala is the largest country of the Central American region, both in terms of production (GDP 2015) that amounts to **\$63.79 billion**, and in terms of a population of **16.34 million inhabitants**.
- In the Central American region, Guatemala is the largest country in market, production, population and has the most diversified economy.



The Industry in Guatemala



- As an economic activity, Apparel and Textile Industry represents 8.9% of the national GDP, contributing decisively in Guatemalan economic growth. On account of this dynamic and efficient development, this industry is the country's largest exporter, producing garments for prestigious brands in the world.
- In 2016, the industry exported **1,526 million dollars to more than 70 markets**, especially the United States of America, Central America and Mexico.

**The industry
represents the
8.9% of
national GDP**

Taking into account that its production is **2.5%** and what contributes with other industries related to the sector is **6.4%**

**The industry
generates more
than 180,000
direct and
indirect jobs**

which 46% are held
by women.

The Industry in Guatemala



More than 280 companies integrates our supply chain:

- **Apparel Manufacturers**
- **Textile and Spinning mills**
- **Supplier companies:**
 - Accessories: buttons, zippers, labels, hangtags, collars
 - Embellishments: embroidery, sublimation, screen printing, dyeing
 - Services: design, cutting, textile laboratory, transportation and logistics
- **Agents**



Competitive Advantages



Guatemala: Commercial Hub

Strategic location with access to the oceans.

Central America Market integration

Higher added value products

Flexibility in production volumes

Guatemala is a
logistic center
given its
proximity to
United States

Integrated supply chain

From yarn, fabrics, embroidery, screen printing, sublimation, trimmings, dyeing and special finishes until the final delivery of the product.

Productive and skilled workforce

Full Package capability

Culture of innovation

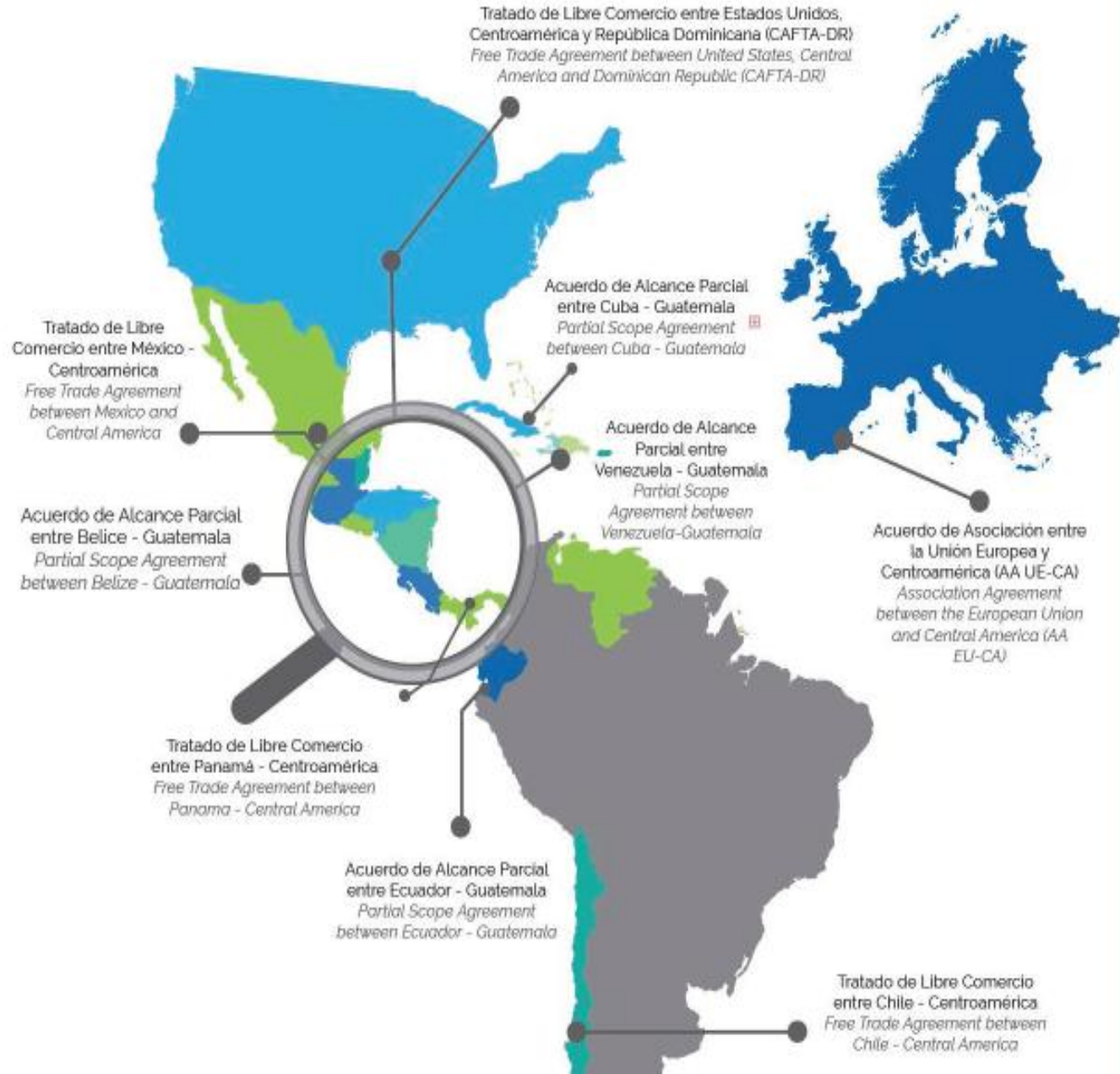
Manufacturers have innovated its services in order to offer quality according to new trends

Competitive Advantages



DUTY FREE ACCESS to several markets

Guatemala's Apparel and Textiles sector takes advantage of trade agreements, which has strengthened its market in various industries such as the United States, Central America and Mexico.





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Trade Statistics 2015-2016

Source: Bank of Guatemala (BANGUAT)

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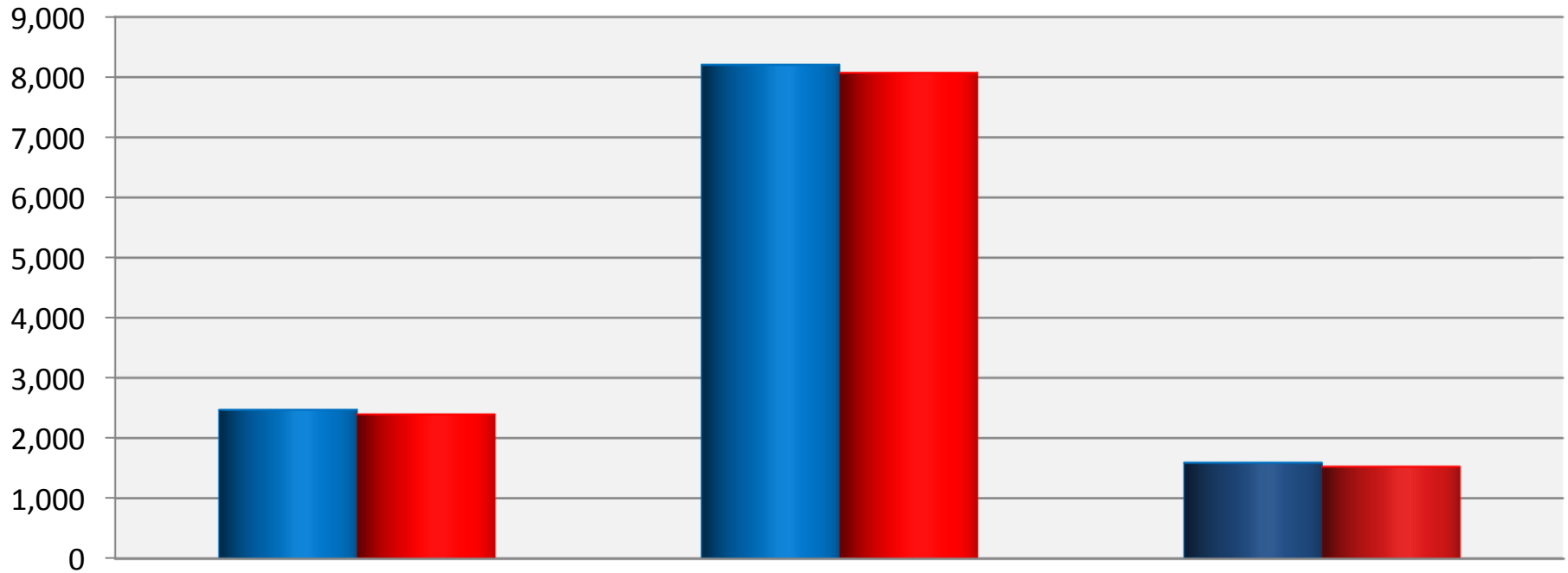
Our competitive advantage: Quick Response



Guatemala: Traditional vs. Non Traditional Exports

2015-2016

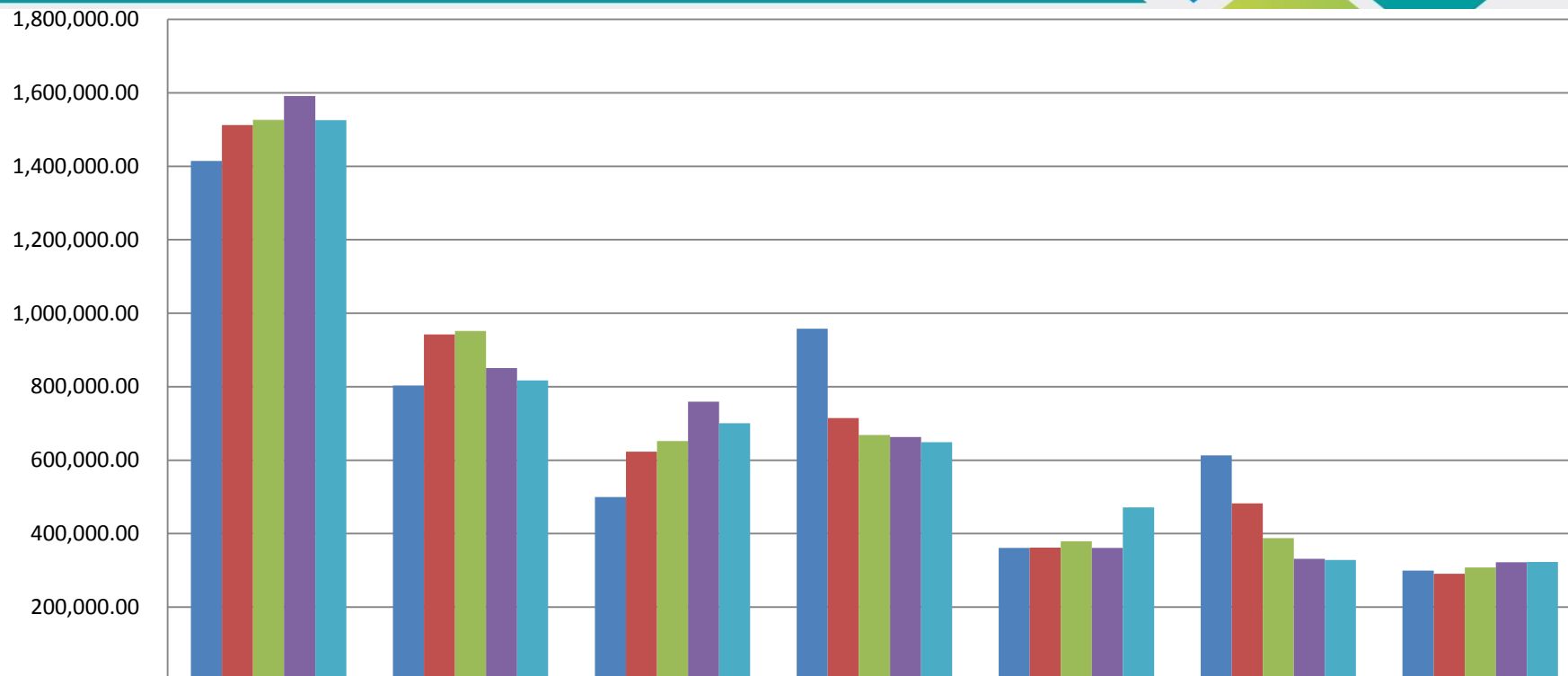
(Millions of US \$)



	Traditional	Non Traditional	Apparel & Textiles
2,015	2,472	8,203	1,592
2,016	2,396	8,069	1,526

History: Main export products

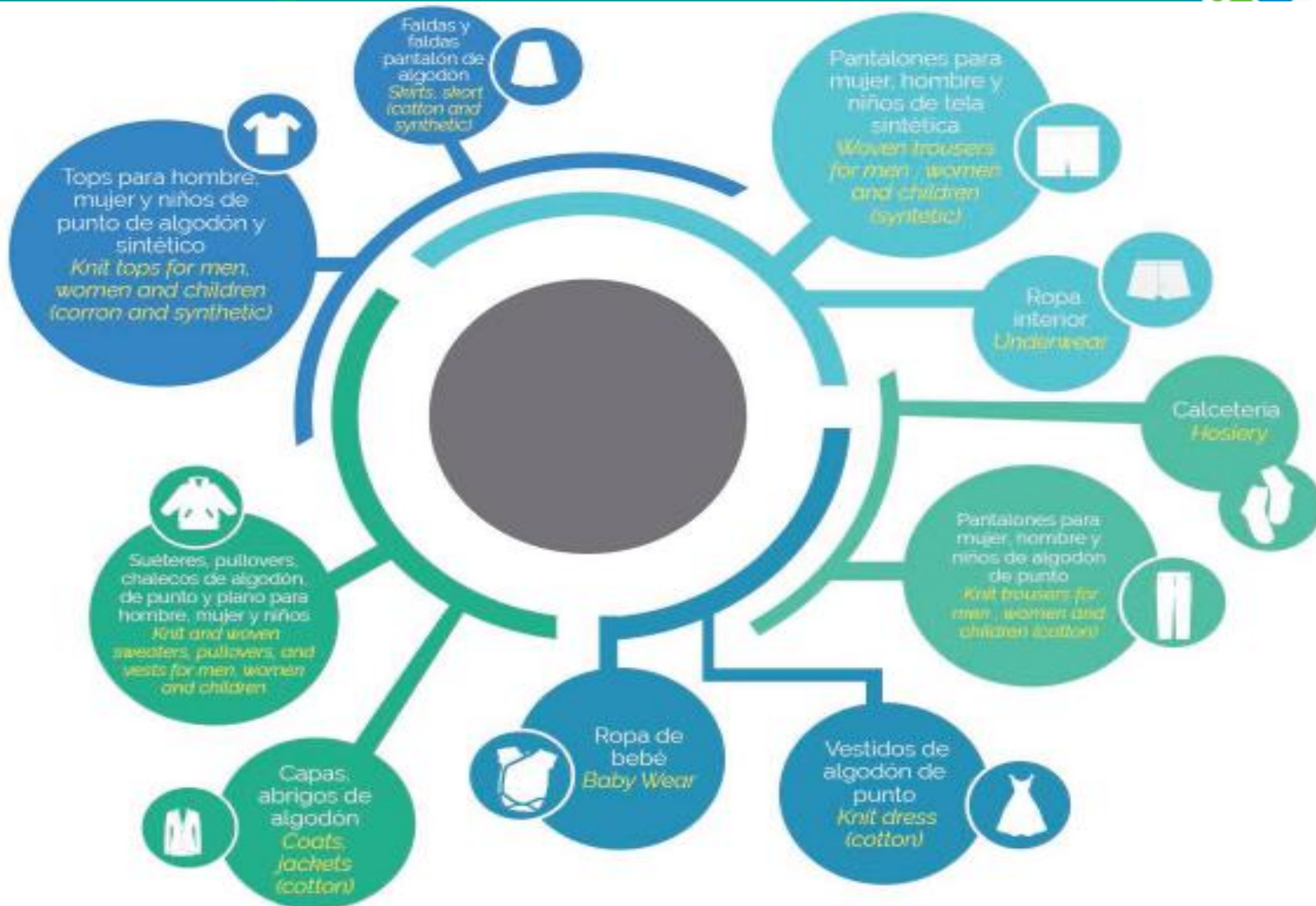
2012-2016
(US\$ millions)



	Apparel & Textile	Sugar	Banana	Coffe	Oil and fats	Lead	Plastics
■ 2012	1,414,551.20	803,015.00	499,547.30	958,113.30	360,978.30	612,930.50	299,242.90
■ 2013	1,512,048.30	941,901.90	623,435.20	714,522.70	361,835.50	482,676.10	290,397.70
■ 2014	1,526,558.70	951,658.80	651,829.50	668,238.50	379,119.80	387,976.10	308,238.60
■ 2015	1,591,581.30	850,906.00	759,450.30	663,006.50	361,024.10	331,630.90	321,788.40
■ 2016	1,525,729.3	817,052.9	700,388.0	649,074.5	471,039.8	328,018.9	322,623.5

Source: Bank of Guatemala (BANGUAT)

Main products exported from Guatemala



Major retailers and brands in Guatemala



**DK
NY**

KOHL'S

Walmart 

OLD NAVY



adidas[®]

TOMMY  HILFIGER



POLO
RALPH LAUREN

GUESS[®]

jumping beans[®]

GAP

Abercrombie & Fitch


HOLLISTER

WESLAND


Reebok


**AMERICAN EAGLE
OUTFITTERS**

carter's[®]

NIKE[®]

OSHKOSH
EST. *B'gosh* 1895

MOTHERHOOD
MATERNITY

FOX[®]

FOREVER 21[®]



JCPenney

EXPRESS

Main Exports Markets



United States

• 79%

Central America

• 14%

Mexico

• 3%

Canada

• 1%

Other countries

• 3%



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Asociación de la Industria del Vestuario y Textiles

¿What is VESTEX?

Guatemala's Apparel and Textiles Association promotes the exports of this industry and represent the interests of this sector through strategic alliances and lobbying with public and private entities at a national and international level.

GUATEMALA DELIVERS

Our competitive advantage: Quick Response



Main Areas in VESTEX

- Market Access (use of free trade agreements and benefits and inquiries)
- Marketing & Promotion (business platform-APSS, communication with members and international promotion, buyers)

Commercial



- Compliance obligations in legal, taxes, labor and health and safety issues
- Corporate Social Responsibility
- Environmental Responsibility

Business



Services offered by VESTEX



1. Information Center (Annual directory, updated topics)
2. Marketing & Promotion
3. Access to markets & Rules of Origin
4. Corporate Social Responsibility
5. Compliance (legal, tax, health & safety)
6. Electrical Topics
7. Environmental Responsibility
8. Trainings
9. MAQCORE (Korean producers)



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