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## **Ecuador**

### **Exporter Guide**

#### **Despite Ecuador's Trade Restrictive Measures and Economic Recession, Opportunities Exists for U.S. Food Product Exports**

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**Report Highlights:**

Despite a recession in 2016, a slower growth forecast for 2017 and measures to restrict imports, Ecuador offers U.S. food and agricultural product exporters a number of trade possibilities. Younger, lower and middle-income consumers' purchasing power and appetite for imports continues to strengthen. Domestic production cannot meet consumer demand, necessitating continued imports of food and other essential goods imports. U.S. exports of food and agricultural products to Ecuador in CY 2016 (through October) at \$272 million are down \$23 million, 8 percent compared to the same period of 2015. FAS Quito forecasts U.S. food and agricultural exports to Ecuador to reach \$300 million in CY 2016, the lowest in five years.

**Post:**

Quito

## **SECTION I. MARKET OVERVIEW**

Ecuador's real gross domestic product (GDP) is forecast to expand modestly in 2017, reaching about 0.3 percent following a contraction of 2.3 percent in 2016. Economic growth is expected to recover during 2019-21, averaging about 2.2 percent per year, but well below the 2011-15 annual average of 4.5 percent. Ecuador faces short-term difficulties as weak prices depress activities in the country's oil sector and reduce the scope for government stimulus.

The country, however, continues to offer U.S. food and agricultural product exporters a number of excellent possibilities. Ecuador's population of 16.1 million inhabitants (Central Intelligence Agency, July 2016 estimate) with a median age of 27.4 years continues growing at just under 1.3 percent per annum.

Younger and lower to middle income consumers' purchasing power and appetite for imports remains strong despite the economic slowdown. Unemployment averages around 5.2 percent and will remain at this level through 2017. But Ecuador's underemployment rate is around 45 percent. This underemployment of the workforce at 7.6 million is limiting further consumption. The government is seeking to improve consumption through a combination of private and public-sector salary increases and cash transfer programs.

While Ecuador remains dependent on petroleum extraction, the country is preparing for the post oil era, and mining should take a more prominent role in the coming years. In the short-term the state led economic model, characterized by high public spending and investment, will be constrained by lower oil prices through 2017. Presidential elections in the first half of 2017 will determine if the country will continue with this economic model. Oil revenues in 2015 accounted for about one third of the country's export earnings and 20 percent of its public sector revenues. A drop in oil income may prod any upcoming presidential administration to boost incentives for private sector and foreign direct investment in the manufacturing and service sectors.

Short of a collapse in oil prices, with prices remaining depressed for an extended period of time, de-dollarization risk remains low. Since 2000, dollarization has contributed to macro-economic stability and is extremely popular. The government is adjusting to lower oil prices. In 2016 its price per barrel budget assumptions went from \$35 to \$25 for Ecuador's oil mix which trades at a discount to its benchmark West Texas Intermediate (WTI). While the dollarization regime requires a strong fiscal and external balance, both of which remain weak, sources indicate that popularity of any future president in office is strongly linked to the dollarization regime.

In June 2014 Ecuador returned to international capital markets for the first time since its \$3.2 billion bond default. In 2016 Ecuador put out bonds for \$2.7 billion with rates around 10 percent. China has also provided additional loans, making it Ecuador's main creditor. Ecuador is servicing its Chinese debt through future oil shipments. Ecuador's access to bilateral and multilateral lending, along with relatively supportive oil prices, similarly limits the likelihood of de-dollarization in the short to medium-term.

By dollarizing, Ecuador has given up an independent monetary policy. National monetary growth is now dependent on foreign exchange inflows and domestic lenders confidence. The dollarization regime

also imposes a constraint on the country's export oriented sectors since competitiveness is dependent on productivity gains and not through local currency devaluations.

Household consumption will remain moderate in the short to medium-term. Local production is not keeping up with domestic demand, necessitating continued imports. Despite measures to restrict import growth to control the outflow of dollars, Ecuador remains dependent on food and other essential goods imports. FAS Quito forecast's this demand to continue expanding in real terms, making Ecuador vulnerable to external price fluctuations.

**Table 1: Main Economic Indicators, Ecuador, Expenditure of GDP (Percentage)**

	<b>2014 Actual</b>	<b>2015 Actual</b>	<b>2016 Forecast</b>	<b>2017 Forecast</b>	<b>2018 Forecast</b>
<b>Nominal GDP (\$ billions)</b>	102.3	100.2	100.4	102.3	104.4
<b>Real GDP Growth</b>	4.0	0.2	-1.9	0.3	-0.9
<b>Consumer Price Inflation</b>	3.8	3.5	1.0	1.6	1.3
<b>Imports of Goods (\$ billions FOB)</b>	26.6	20.7	17.4	19.9	20.8
<b>Private Consumption (% real change)</b>	3.4	-0.1	-4.2	-0.6	-1.3
<b>Public Sector Consumption (% real change)</b>	5.2	0.6	-0.5	0.4	-5.8
<b>Exports of Goods (\$ billions FOB)</b>	26.6	19.1	18.5	21.6	23.0
<b>Unemployment Rate</b>	5.0	4.8	5.5	5.8	6.1
<b>Short-term Interest Rate</b>	8.1	8.3	8.8	9.0	9.3

Sources: Economist Intelligence Unit, Central Intelligence Agency, FAS Quito office research.

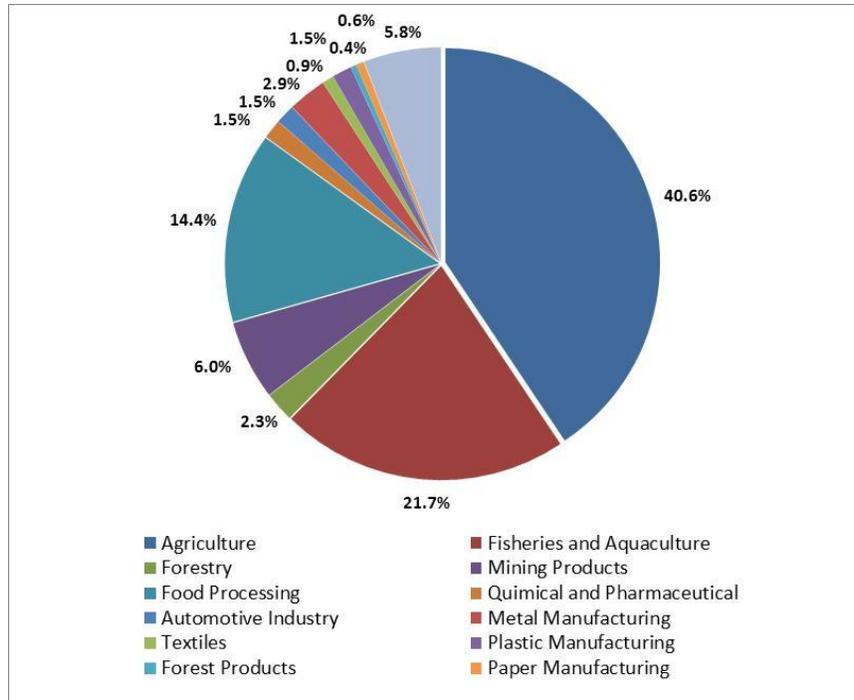
### **General and Agricultural Export-Import Trade Situation**

U.S.-Ecuador agricultural trade in from January to October 2016 totals \$1.9 billion, down \$123.5 million or six percent compared to the same period in 2015. During the same period, the U.S. agricultural trade deficit with Ecuador totaled \$1.4 billion an improvement by 5 percent compared to 2015.

U.S. exports of food and agricultural products to Ecuador in through October 2016 totaled \$272.7 million, down \$24 million or eight percent compared to the same period last year. FAS Quito forecasts that U.S. exports to Ecuador in 2016 will reach \$300 million, driven by Ecuadorian demand for U.S. bulk (e.g., wheat) and intermediate products (e.g., soybean meal).

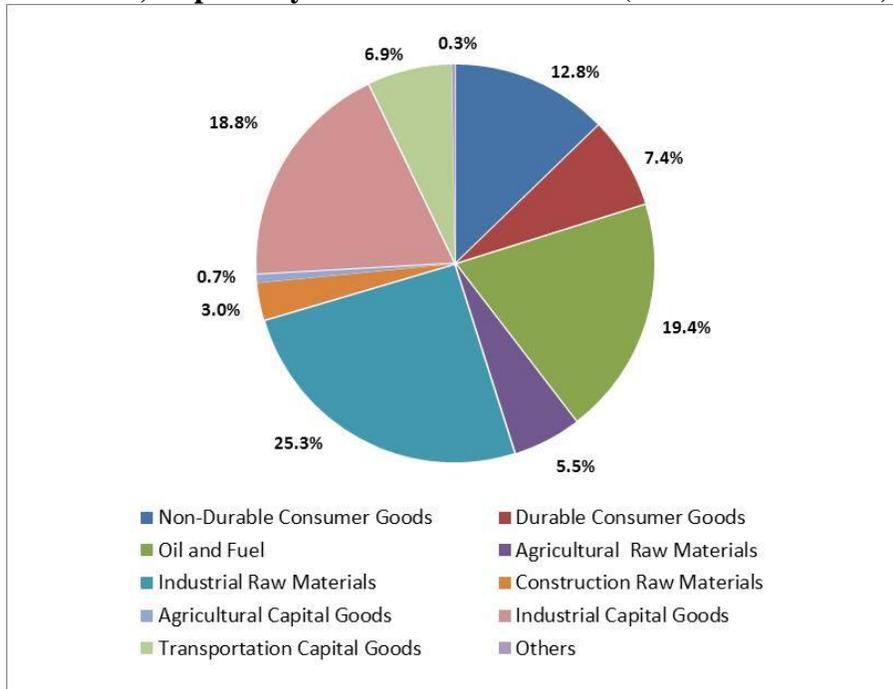
We are forecasting an increase of imports in 2017 due to the termination of Ecuador's import restrictive measures and a change of government authorities. Ecuador is a major exporter of agricultural and fishery products. Exports include bananas, shrimp, cut flowers, and cacao. With \$2.1 billion in exports in 2015 to the United States, Ecuador's exports are down \$125.1 million or 5 percent compared to 2014. FAS Quito forecasts U.S. bound exports in 2016 to total about \$2 billion.

### **Ecuador, Non-Oil Exports by Industry (FOB Value – 2014)**



OBS: Latest full calendar year data 2015 (January-December).  
 Sources: Central Bank of Ecuador (Banco Central del Ecuador), FAS Quito office research.

### Ecuador, Imports by Economic Destination (FOB Value – 2014)



OBS: Latest full calendar year data 2015 (January-December).  
 Sources: Central Bank of Ecuador (Banco Central del Ecuador), FAS Quito office research.

**Table 2: U.S. Supplier Advantages and Challenges**

ADVANTAGES	CHALLENGES
<ul style="list-style-type: none"> <li>• Appreciation for U.S. food quality and culture.</li> </ul>	<ul style="list-style-type: none"> <li>• Import tariffs have increased for several consumer-oriented food products.</li> </ul>
<ul style="list-style-type: none"> <li>• Dollarization has brought a measure of economic stability for importers and improved consumer purchasing power.</li> </ul>	<ul style="list-style-type: none"> <li>• In first quarter of 2017 President Correa’s economic policies will continue to create distortions, leading to the risk of upward price pressures. Consumption of more expensive imported food and beverage products may slow.</li> </ul>
<ul style="list-style-type: none"> <li>• Local food processing industry is challenged to offer competitive market prices.</li> </ul>	<ul style="list-style-type: none"> <li>• Ecuador is a relatively small market, a constraining factor for U.S. exporters seeking large volume contracts.</li> </ul>
<ul style="list-style-type: none"> <li>• Consumers are increasing fast food consumption and grocery store purchases.</li> </ul>	<ul style="list-style-type: none"> <li>• Import restrictive measures.</li> </ul>
<ul style="list-style-type: none"> <li>• Ecuadorians often adopt foreign tastes while residing overseas. Products are introduced to families back in Ecuador, creating niche markets for imported (U.S.) food products.</li> </ul>	<ul style="list-style-type: none"> <li>• U.S. exports are losing market share to Peru, Colombia and Chile, due to more favorable exchange rates and trade agreements.</li> </ul>
<ul style="list-style-type: none"> <li>• The tourism sector is growing, creating HRI opportunities for U.S. food products.</li> </ul>	<ul style="list-style-type: none"> <li>• Food product smuggling.</li> </ul>

## SECTION II. EXPORTER BUSINESS TIPS

Supermarket chains are the main channel for imported food products. These target mainly middle and upper income consumers. FAS Quito recommends that exporters of U.S. food and agricultural products contact large importers, wholesalers/distributors, or supermarkets directly. The main supermarket chains, accounting for 60 percent of total food sales, include *La Favorita* (SUPERMAXI and MEGAMAXI) and El Rosado (MI COMISARIATO). *Tiendas Industriales Asociadas*, *Mega Santa Maria*, and *Supermercados Coral* are expanding medium-sized supermarket chains.

Importers require that the exporter obtains all necessary export permits and licenses, and arrange for logistics to the U.S. shipping port. Imports in Ecuador are handled at the individual level or by a company. An import permit (DAI – Customs Import Declaration) is required. Certain imports require Ministries of Agriculture or the Ministry of Public Health import authorization.

Importers purchase based on price and quality. There are niche markets for high value products for upper income consumers, where pricing is not necessarily a concern. The use of point-of-purchase (POP) material is recommended, as well as promotional campaigns and samplings.

Ecuadorian eating habits have changed over the years. With more women working outside of the home and commute times and distances getting longer, consumers are increasingly turning to fast foods and processed food products. Strategic alliances with producers are allowing local supermarkets to carry a growing number of store branded products. Competition is fierce. To seize market share, distributors will often discount products 10-20 percent in stores to build product awareness and demand.

### Road Map for Market Entry

FAS Quito recommends that U.S. exporters consider the following steps:

- Identify the distribution channel that best fits a company's market strategy.
- Depending of the channel chosen, identify a strategic partner that will import the product.
- Obtain the sanitary notification or sanitary certification depending of the product either directly or through a local partner.
- Request import permits when required.
- Forward the importer copies of customs clearance documentation prior to shipment.
- Provide ongoing support to the importer to help build consumer demand.

### **Sanitary/Phytosanitary (SPS) Regulations**

Sanitary inspection, food registration, packaging, and control regulations for food and beverages are regulated by the Ministry of Health and the National Sanitary Control and Regulation Agency (ARCSA). The latter is Ecuador's version of the Food and Drug Administration (FDA) regarding sanitary supervision and registration of food and beverages. AGROCALIDAD (national sanitary authority) is part of the Ministry of Agriculture. Like specialized agencies within the U.S. Department of Agriculture (USDA), AGROCALIDAD oversees the development of sanitary and phytosanitary regulations and the inspection of products of animal and plant origin. The National Institute for Standardization and Norms (INEN) is the agency responsible for labeling standards, labeling control, and trademarks.

### **Import and Inspection Procedures and Documentation**

Ecuador's Customs Authority (SENAE) requires that food and agricultural product imports be accompanied by the following documents:

- Import Customs Declaration (DAI) form
- Commercial invoice
- An airway bill or bill of lading
- Packing list
- Insurance letter
- Certificate of origin
- An ARCSA food sanitary registration for processed food products OR a health certificate for animal, plant, or by-products that meet AGROCALIDAD's import requirements.

Once the customs agent transmits the DAI, SENAE assigns an inspection control channel. Control channel inspections range from simple documentation review to the physical inspection of products. Any discrepancies between the DAI and shipment will lead to delays and possible shipment confiscation. SENAE does permit the re-export of products. Exporters should not send samples or extra promotional items not included on the DAI and the commercial invoice.

### **Food and Beverage Sanitary Notification**

All imported processed food products need a sanitary notification number prior to entry into the country. This is a complicated and time consuming procedure. The sanitary notification for imported products is granted by confirmation (or equivalence). The sanitary registration petition can either be filed by the manufacturer or by its Ecuadorian legal representative. In either case, the registration belongs to and is issued on behalf of the manufacturer unless specifically requested otherwise. The sanitary notification is valid for five years from the date of issue.

Applications must be electronically filed with the ECUPASS system and include: 1) the name and address of the person or entity under whose name the sanitary registration is requested; 2) name, phone, and full address of the manufacturer; 3) product name in full, including brand name; 4) product description; 5) an ingredient list or composition formula (in percentages) used in the product (including additives) declared by the manufacturer in descending order; 6) production code interpretation; 7) shelf life; 8) packaging information declaring the type of container and content expressed in International Measurement System (SI) units and conservation conditions, and; 9) the signatures of legal representative of the company and technical expert.

#### Additional Documents:

- The manufacturer's certification or the product owner's authorization granting the importer permission to register the product.
- A certificate of free sale, sanitary and phytosanitary certificate, or an export certificate issued by the competent authority in the country of export.
- A technical report describing the product's general processing procedures.
- Description and interpretation of the batch code.
- Physical and chemical specification of the packaging/container material in any format issued by the packaging manufacturer or distributor.
- An original product label and the project label in Spanish that meets INEN technical standards and related regulation.
- A sworn statement signed by a technical expert attesting that the product meets relevant national technical standards. In the absence of a national technical norm, the importer must declare that the product meets international standards or manufacturer specifications.
- A phytosanitary certificate is required for: 1) walnuts without shell; 2) almonds; 3) hazelnuts; 4) raisins; 5) prunes, and; 6) pine nuts for human consumption that have not undergone a transformation process.
- Organic products must be accompanied by corresponding organic certification.

Prior to requesting a sanitary notification, an importer/distributor will need to obtain from the Ministry of Health a sanitary certificate for the storage facility where imports will be warehoused. A new sanitary notification permit is needed when a product's composition, conservation process, nature of its container, or manufacturer changes. A new permit is also required whenever there is a substantial modification of: 1) colorings; 2) flavorings; 3) sweeteners; 4) conservation agents, and; 5) nutritional additives. Non-Spanish language documents must be translated. Foreign documentation must be authenticated/ legalized by the Ecuadorian consulate of jurisdiction or have an [apostille](#) affixed.

At FAS Quito, we understand that the sanitary notification regulation provides a registration exemption for food products and ingredients that are utilized by local food manufacturers in final products that have

their own sanitary notification. To be eligible to import product under this provision, the product must have prior authorization from the Office of the Director of General Health. Obtaining approval is highly cumbersome, requiring proof that the product or ingredient will not be commercialized prior to undergoing substantive transformation.

### **Certificates for Animals, Plants, and By-Products**

To import animal, plant, or their derived products, the importer must request an import permit from AGROCALIDAD prior to shipment. The exporter must provide the importer with the official country of origin health certificate. For U.S. origin animal and plant, and their derived products, Ecuador only accepts health certificates issued by USDA's Animal and Plant Health Inspection Service (APHIS). It only accepts USDA's Food Safety and Inspection Service (FSIS) certification for meat and meat products.

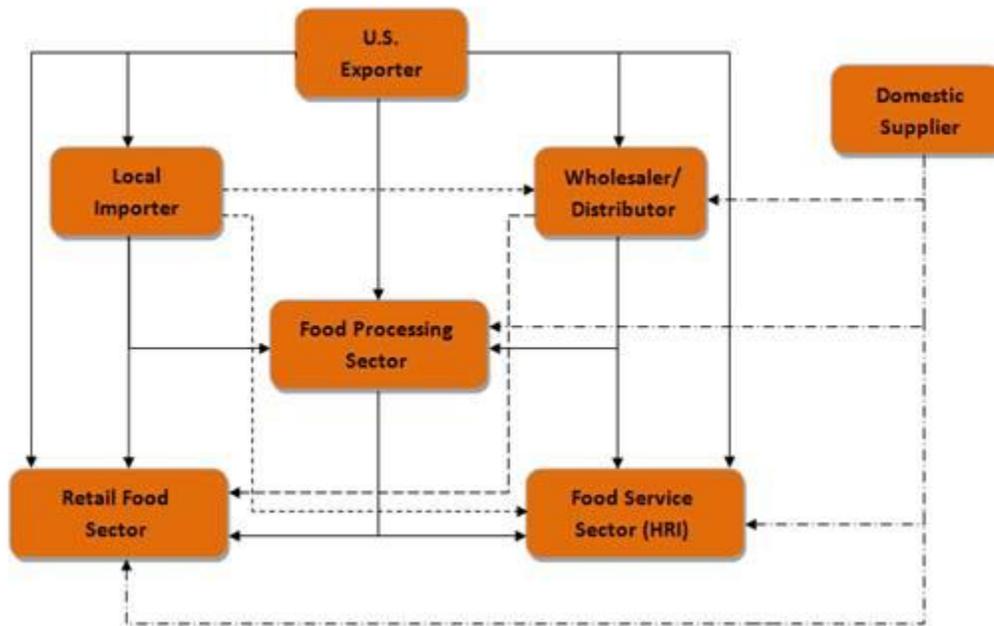
### **Labeling Requirements**

Imported packaged foods must carry a separate adhesive label before reaching the point of sale. A Spanish language translation of the label must include all information required by technical standard norms [NTE INEN 1334-1:2011](#), [NTE INEN 1334-2:2011](#), and [NTE INEN 1334-3:2011](#), and meet the requirements of the Ministry of Health's (Executive Agreement 4522) food labeling regulation. The latter requires that all processed foods need to include a clearly visible traffic light symbol for sugar, fat, and salt on each individual packaging label. See FAS Quito's FAIRS Narrative 2014 for additional information on current labeling requirements.

## **SECTION III. MARKET SECTOR STRUCTURE AND TRENDS**

### **Market Structure**

- Supermarket chains are the main means for reaching middle and upper income consumers.
- Exporters should directly contact importers, wholesalers/distributors, or supermarkets.
- U.S. exporters can approach Gas Marts, grocery, and convenience stores through major local suppliers (wholesalers/distributors).
- Be diligent when selecting a partner (an agent or a representative). Personal visits/meetings are highly recommended. Conduct a background check of the prospective partner before signing permanent contractual arrangements.
- The local partner will provide updated information on consumer trends, as well as identify niche markets, possible market development activities, and business practices.
- Major supermarket chains are forceful negotiators.
- Supermarket suppliers supply a wide range of products.
- Major food importers/distributors supply all major supermarket chains and provincial retailers. Major supermarket chains will request product exclusivity.
- Food products are often imported in consolidated containers.
- Major supermarket chains import high-end products directly to earn higher margins.
- Distributors and wholesalers conduct frequent in-store promotional activities, assigning their own support personnel in each store.

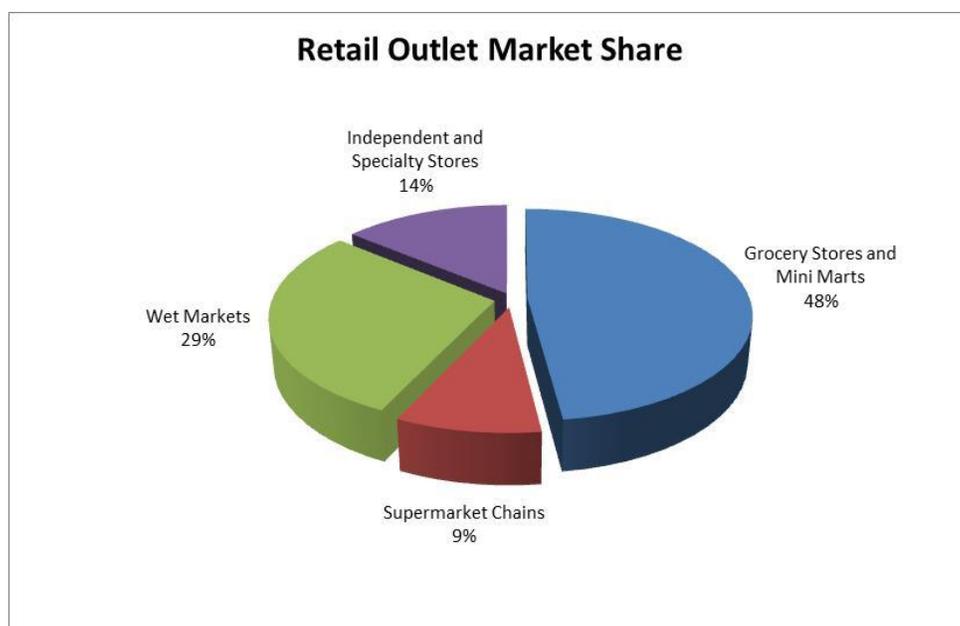


Ecuador’s retail food sector is divided into five main categories: supermarket chains, open or wet markets, independent groceries, small food stores, and convenience stores (i.e., mini-marts). Retailers are known to request from suppliers lower prices, in order obtain higher sales margins. Alternatively retailers can be enticed with offers of promotional cost sharing.

Distribution channels vary between locally sourced products and imports. Retail food companies will seek to import directly to bypass brokers and lower costs. Retailers nonetheless continue to purchase significant volumes from local importers/distributors, especially for high demand items. The local food processing companies usually have their own distribution chain which will contain wholesalers, self-service, traditional retailers, and to a lesser extent Hotel, Restaurant, and Institutional (HRI) caterers.

### **Retail Food Sector**

Forty-eight percent of Ecuadorians are reported to purchase their food and grocery items at local grocery stores. Monthly food expenditures are roughly \$250 on average. Most middle to upper income consumers (36 percent of Ecuadorians) purchase food products in modern supermarkets. Supermarket store sales are trending upwards in part due to the stores’ cleaner, more organized format and greater imported product availability.



Sources: Instituto Nacional de Estadísticas y Censos (Encuesta Nacional de Ingresos y Gastos 2012)

While supermarkets on average allocate about 18 percent of store shelf space to imports (e.g., fruits and vegetables, beverages, snacks, and frozen foods), mini-marts specialize in supplying items such as liquors, snacks, and soft drinks. Stores sales spike during holidays, especially for Christmas, Valentine’s Day, Carnival, and Mother’s Day, and Father’s Day. Demand for consumer-ready products also peaks during the tourist season (June-September).

### Ecuador, Retail Sales and Consumer Expenditure, (\$ billions), 2012-16

	2013	2014	2015	2016 (estimate)	2017 (forecast)
Retail Food Sales (\$ billion)	\$22.3	\$23.7	\$24.2	\$25.0	\$26.0
Food, Beverage and Tobacco (consumer expenditure; \$ billion)	\$14.7	\$15.6	\$16.3	\$17.3	\$18.5

Source: Economist Intelligence Unit.

### Food Processing Sector

Ecuadorian food processors tend to favor sourcing food ingredients from Chile and Mexico, as well as neighboring Colombia due to favorable exchange rates. Importers remain keen on importing processed sugar, concentrated ingredient flavors, juice concentrates and mixes, colorants, cereals, meats, flour, and extracts.

At FAS Quito, we continue to see good opportunities for food ingredients, especially for seasonings used in the manufacture of pre-cooked and easy-to-prepare meals. Besides PRONACA, which has a well-diversified product line, other food processors are diversifying their product offerings. For

example, TecnoPesca de Manta (a fishing company) is now manufacturing soups and seafood dishes. For more information about the Food Processing Sector please review our Food Processing Ingredients GAIN Report.

### **Hotel, Restaurant, and Institutional Food Service Sector**

Although commencing from a low base, consumer spending in restaurants and eating out is expected to stay stable over the next couple of years. HRI expenses represent 7.7 percent of household expenditures. Most restaurants will continue to be supplied by a combination of local producers and importers. Large, international hotel chains will continue to import directly through their agents.

Tourism is driving HRI growth. Tourist numbers in 2015 are estimated at 1.5 million. However, a decrease of 5 percent is anticipated in 2016. Products with the greatest demand include meat, shell-fish, salmon, mussels, squid, wine, beer, liquor, olive oil, truffles, canned tomatoes, confectioneries, sausages, pre-cooked frozen potatoes, cheese products, and spices.

Domestic demand for fast food is also growing. Most of the major US fast food chains are represented in Ecuador, although they are concentrated in the large urban centers. Franchises operating in Ecuador include KFC, Pizza Hut, Burger King, McDonald's, Dunkin Donuts, Domino's Pizza, Papa Johns, Baskin Robbins, Subway, Taco Bell, TGI Fridays, Tony Roma's, Chili's, American Deli, Crepes & Waffles, Tropi Burger, Pollo Tropical, and Little Caesars.

Products used by franchise restaurants are largely imported. Key imports include mayonnaise, ketchup, mustard, beef, poultry, spices, special ingredients, cheese, pepperoni, bacon, olives, corn oil, frozen French fries, ice cream and yogurt mixes.

Wine is an increasingly important product for the HRI sector. Chile and Argentina, followed by the United States, the European Union, and Australia are Ecuador's major suppliers. Chilean and Argentine wines face lower import tariffs compared to wines from other origins.

## **SECTION IV: BEST HIGH-VALUE PRODUCT PROSPECTS**

## Best Consumer-Oriented Product Prospects

Product Category	2015 Market Size Import Volume	2015 Import Sales	5-Yr. Avg. Annual Import Growth	Import Tariff Rate	Key Constraints Over Market Development	Market Attractiveness for USA
<b>Fresh Fruits</b>	120,341 MT	\$87.8 million	1.6% per annum	Apples = 17% Pears = 17% Grapes = 15% Others = 25%	Chile benefits from lower tariffs and shipping proximity.	Demand for fresh fruits is rising. U.S. export window of opportunity during Chile's off season.
<b>Dried Fruits and Nuts</b>	8,948 MT	\$16.9 million	4% per annum	15-25%	Chilean suppliers benefit from long established relationships with local importers.	Demand is growing. Importers are interested in different types of nuts.
<b>Chocolate</b>	6,132 MT	\$29.2 million	7.7% per annum	30%	Local production, especially of dark chocolate is up.	Unmet demand for product diversity. U.S. brands are well known.
<b>Sugar Confectionery Products</b>	13,857MT	\$31.6 million	5% per annum	20%	Colombia benefits from competitive prices and shipping proximity.	Growing demand for elaborate confectionary products. Local sugar prices are high.
<b>Bakery Products, noodles and pasta</b>	34,196 MT	\$102.6 million	3.5% per annum	20-30%	Competitors include CAN and neighboring states; benefit from tariffs and shipping proximity.	Demand for specialized products that do not exist in the region.
<b>Teas and infusions</b>	142 MT	\$4.1 million	22% per annum	30%	Strong local and EU competition.	The United States is a traditional supplier of teas and infusions.
<b>Frozen Produce</b>	616 MT	\$699,223	10.9% per annum Immature Market	25%	Lack of cold chain infrastructure. Quality misperceptions.	Shipping proximity. Nascent demand.
<b>Precooked, ready-to-eat frozen meals</b>	N/A	N/A	Immature Market	No specific HS tariff code. 20% when listed as 2106.90.99	Local production increasing. Quality misperceptions.	Demand for greater product diversity and shipping proximity. Nascent demand.
<b>Specialty Beers</b>	2,1 million liters	\$1,9 million	-0.1% per annum	Varies by alcohol content	Local production. Government aims to limit consumption.	Strong importer interest for alternative, non-pilsner beer styles.
<b>Spirits and Liqueurs</b>	2.1 million liters	\$7.2 million	-18.7% per annum	Varies by alcohol content	UK brands are well established. Government aims to limit consumption.	Strong demand for spirits. Shipping proximity. Strong interest in importing as bulk; product can be bottled locally at a lower tariff and tax rate.

OBS: Latest full calendar year data 2015 (January-December).

## SECTION V: KEY CONTACTS AND FURTHER INFORMATION

U.S. Embassy Quito, Foreign Agricultural Service (FAS) Office of Agricultural Affairs

Physical Location: Avda. Avigiras E12-170 y Ave. Ely Alfaro, Quito, Ecuador

Mailing Address: FAS OAA Quito, Unit 3420, Box 200, DPO, AA 34039-0200

Phone: (593-2) 398-5323 • Fax: (593-2) 398-5031 • E-mail: [agquito@fas.usda.gov](mailto:agquito@fas.usda.gov)

For additional information, see [www.fas.usda.gov](http://www.fas.usda.gov). See also to our Exporter Guide, Food and Agricultural Import Regulations and Standards (FAIRS), FAIRS Export Certificate, and Food Processing Ingredients Sector GAIN reports.

**Central Bank of Ecuador (Banco Central del Ecuador)**

Website: [www.bce.fin.ec](http://www.bce.fin.ec)

**Instituto Nacional de Estadísticas y Censo**

Website: [www.inec.gob.ec](http://www.inec.gob.ec)

**Ministerio de Agricultura, Ganadería, Acuacultura y Pesca**

Website: [www.agricultura.gob.ec](http://www.agricultura.gob.ec)

**AGROCALIDAD**

Website: [www.agrocalidad.gob.ec](http://www.agrocalidad.gob.ec)

**Agencia Nacional de Regulación, Control y Vigilancia Sanitaria (ARCSA)**

Website: [www.controlsanitario.gob.ec/](http://www.controlsanitario.gob.ec/)

**INEN**

Website: [www.normalizacion.gob.ec/](http://www.normalizacion.gob.ec/)

**APPENDIX - STATISTICS**

**Table A: Key Trade and Demographic Information**

Agricultural Imports From All Countries (\$Mil) / U.S. Market Share (%) <sup>1/</sup>	\$2.0 billion/ 19.6%
Consumer Food Imports From All Countries (\$Mil) / U.S. Market Share (%) <sup>1/</sup>	\$642.9 million/ 9.7%
Edible Fishery Imports From All Countries (\$Mil) / U.S. Market Share (%) <sup>1/</sup>	\$84.5 million/ 4.5%
Total Population (Millions) / Annual Growth Rate (%)	16.1 million/ 1.31%
Urban Population (Millions) / Annual Growth Rate (%)	63.7% / 1.9%
Number of Major Metropolitan Areas	Guayaquil 2.7 million Quito (capital) 1.7 million
Size of the Middle Class (Millions) / Growth Rate (%)	3.6 million/ 22.8%
Per Capita Gross Domestic Product (U.S. Dollars)	\$11,735 PPP
Unemployment Rate (%)	5.2%
Per Capita Food Expenditures (U.S. Dollars)	\$1012.7
Percent of Female Population Employed	60%
Exchange Rate (US\$1 = US\$1)	\$1.00

Sources: (1) FAS – UNTrade. Economist Intelligence Unit, Gallup, Central Intelligence Agency, USDA-ERS, FAS Quito office research.

**Table B: Agricultural, Consumer Food and Edible Fishery Product Imports (\$ million)**

HS Code	Description	Imports from the world			Imports from the United States			U.S Share 2015
		2013	2014	2015	2013	2014	2015	
23	Food Industry Residues & Waste; Prep Animal Feed	503.9	628.4	596.7	229.6	210.4	205.5	34%
10	Cereals	319.4	360.6	314.6	67.9	107.5	85.1	27%
21	Miscellaneous Edible Preparations	205.8	220.0	202.1	25.4	31.4	26.5	13%
15	Animal Or Vegetable Fats, Oils, Etc. & Waxes	194.5	162.9	145.0	1.9	1.0	0.6	0%
08	Edible Fruit & Nuts; Citrus Fruit Or Melon Peel	137.8	149.6	104.0	17.6	14.2	8.5	8%
19	Prep Cereal, Flour, Starch Or Milk; Bakers Wares	125.1	102.0	102.6	5.9	4.3	4.1	4%
03	Fish, Crustaceans & Aquatic Invertebrates	111.4	124.5	83.4	2.0	3.9	3.2	4%
17	Sugars And Sugar Confectionary	62.6	70.6	68.5	3.2	3.5	2.4	3%
20	Prep Vegetables, Fruit, Nuts Or Other Plant Parts	54.6	53.2	45.7	6.7	4.4	4.1	9%
07	Edible Vegetables & Certain Roots & Tubers	42.4	48.1	43.2	1.3	0.9	1.5	3%
22	Beverages, Spirits And Vinegar	50.5	41.6	32.9	3.5	2.2	1.7	5%
11	Milling Products; Malt; Starch; Inulin; Wheat Gluten	46.4	37.2	31.0	0.2	0.1	0.5	1%
18	Cocoa And Cocoa Preparations	37.7	40.8	29.6	4.0	7.4	4.3	14%
12	Oil Seeds Etc.; Misc Grain, Seed, Fruit, Plant Etc.	24.9	28.2	25.2	9.5	10.0	8.4	33%
01	Live Animals	17.8	18.7	24.6	1.6	2.8	2.7	11%
04	Dairy Products; Birds Eggs; Honey; Edible Animal Products Nesoi	31.2	30.9	20.6	2.5	1.5	0.9	4%
05	Products Of Animal Origin, Nesoi	18.9	21.6	18.4	8.9	10.4	7.9	43%
06	Live Trees, Plants, Bulbs Etc.; Cut Flowers Etc.	14.8	15.0	13.4	0.6	1.2	0.7	5%
09	Coffee, Tea, Mate, & Spices	15.5	10.8	12.6	0.4	0.2	0.3	3%
02	Meat And Edible Meat Offal	26.0	21.2	12.6	9.0	7.2	6.5	52%

13	Lac; Gums, Resins & Other Vegetable Sap & Extract	8.2	8.3	8.9	2.3	2.3	2.6	29%
16	Edible Preparations Of Meat, Fish, Crustaceans Etc.	12.8	9.8	5.5	2.0	1.3	1.2	23%
14	Vegetable Plaiting Materials & Products Nesoi	0.8	1.0	0.7	0.2	0.1	0.1	12%
<b>Grand Total</b>		<b>4076</b>	<b>4219</b>	<b>3957</b>	<b>2419</b>	<b>2442</b>	<b>2394</b>	<b>12%</b>

OBS: Latest full calendar year data 2014 (January-December). NESOI = Not Elsewhere Specified or Indicated.  
Source: Global Trade Atlas (HS 2-digit).

**Table C: Ecuador, Top 15 Suppliers, Consumer Foods (\$ millions) Partner Country**

Partner Country	2013	2014	2015	% Share 2015	% Change 2015/2014
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Chile	230	219	195	30.3%	-11.1%
Colombia	137	135	99	15.4%	-26.5%
Peru	107	130	89	13.9%	-31.1%
<b>United States</b>	<b>82</b>	<b>79</b>	<b>63</b>	<b>9.7%</b>	<b>-21.1%</b>
Mexico	36	29	35	5.4%	20.6%
China	23	23	23	3.6%	0.7%
Brazil	26	23	17	2.7%	-25.5%
Spain	17	23	16	2.6%	-27.0%
Netherlands	18	21	16	2.4%	-24.9%
Argentina	12	11	12	1.9%	6.1%
Belgium	9	9	11	1.7%	26.5%
Italy	6	10	10	1.5%	0.5%
Uruguay	5	5	6	1.0%	23.4%
Germany	6	7	6	0.9%	-10.9%
Sri Lanka	6	5	5	0.9%	6.0%
<b>Total top 15</b>	<b>719</b>	<b>728</b>	<b>603</b>	<b>93.9%</b>	<b>17.1%</b>

OBS: Latest full calendar year data 2014 (January-December).

Source: Global Trade Atlas (Consumer-Oriented Agricultural Total, Group 32).