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Required Report - public distribution

Date: 11/23/2015

GAIN Report Number:

Ecuador

Exporter Guide 2015 Annual

Notwithstanding Ecuador's Trade Restrictive Measures, Opportunities Exists U.S. Food Product Exports

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Report Highlights:

Despite slower growth forecast for 2016 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 2015 (through September) at \$285 million are down \$45 million, 12 percent compared to 2014. FAS Quito forecasts U.S. food and agricultural exports to Ecuador to still reach \$400 million in CY 2015.

SECTION I. MARKET OVERVIEW

Ecuador's real gross domestic product (GDP) is forecast to expand modestly in 2016, reaching about 0.8 percent following a contraction of 0.7 percent in 2015. Economic growth is expected to recover in 2017-18, averaging about three percent, but still down compared to the 2007-14 average of 4.3 percent. Ecuador is facing 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 good possibilities. Ecuador's population of 15.8 million inhabitants (Central Intelligence Agency, July 2015 estimate) with a median age of 27 years continues growing at just under 1.4 percent per annum.

Younger and lower- to middle-income consumers' purchasing power and appetite for imports remains good despite the economic slowdown. Unemployment averages around five percent, where it should remain through 2017. Ecuador's underemployment rate however hovers at a high of 40 percent. High underemployment in a workforce numbering 7.2 million is a key factor 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. In the short-term however its state-led economic model, characterized by high public spending and investment, will be constrained by softer oil prices through 2016. Oil revenues normally account for about half of the country's export earnings and quarter of its public sector revenues. A drop in oil income may prod President Rafael Correa's administration to boost incentives for private sector and foreign direct investment in the manufacturing and service sectors, as well as in the mining sector. Sources report that fiscal laxity, low government savings, and policymaking uncertainty will continue limit foreign direct investment (currently estimated at 0.8 percent of GDP on average in 2015-19).

Short of a collapse in oil prices, with prices remaining depressed for an extended period of time, de-dollarization risk remains low. Dollarization since 2000 has contributed to macro-economic stability and is extremely popular. The government is adjusting to lower oil prices; it is setting its 2016 budget assuming a \$35 barrel price for Ecuador's oil mix which trades at a discount to its benchmark West Texas Intermediate (WTI). Reportedly the government is forecasting 2016 oil revenues at \$674 million, down significantly from the \$3 billion forecast in 2015. While the dollarization regime requires a strong fiscal and external balance, both of which remain weak, sources indicate that President Correa's permanence 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 the interim, China has 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, benefitting from improvements in labor market conditions and greater access to credit. Local production is not keeping up with domestic demand, necessitating continued imports. Despite measures to restrict import growth, and thus control the outflow of dollars, Ecuador remains dependent on food and other essential goods imports. We forecast 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)

	2013 Actual	2014 Actual	2015 Estimate	2016 Forecast	2017 Forecast
Nominal GDP (\$ billions)	94.8	100.9	103.2	108.0	114.0
Real GDP Growth	4.6	3.8	-0.7	0.8	2.9
Consumer Price Inflation	2.8	3.6	4.0	3.3	3.8
Imports of Goods (\$ billions FOB)	26.1	26.6	20.9	21.5	23.1
Private Consumption (% real change)	3.5	3.5	1.2	1.0	1.8
Public Sector Consumption (% real change)	7.5	3.5	2.0	-2.0	0.5
Exports of Goods (\$ billions FOB)	25.6	26.6	18.3	19.1	21.1
Unemployment Rate	4.7	5.0	4.8	5.1	4.8
Short-term Interest Rate	8.7	8.5	8.8	9.0	9.3

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

General and Agricultural Export-Import Trade Situation

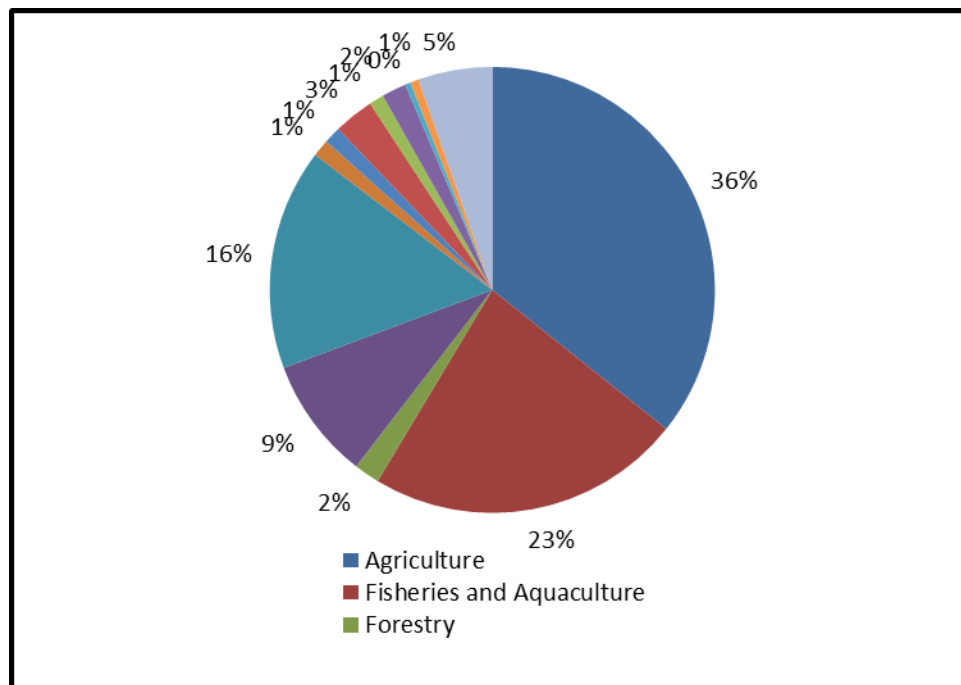
U.S.-Ecuador agricultural trade in calendar (CY) 2015 (January-September) at \$1.9 billion, is down \$132.6 million or six percent compared to 2014. The U.S. agricultural trade deficit with Ecuador at \$1.3 billion to date has improved by 3.5 percent compared to 2014.

U.S. exports of food and agricultural products to Ecuador in CY 2015 (through September) were \$284 million, down \$42 million or 13 percent compared to the same period last year. At FAS Quito, we estimate that U.S. exports to Ecuador in CY 2015 will reach \$400 million, driven by Ecuadorian demand for U.S. bulk (e.g., wheat) and intermediate products (e.g., soybean meal).

We are forecasting a drop in imports as a consequence of Ecuador's implementation of import restrictive measures in 2015.

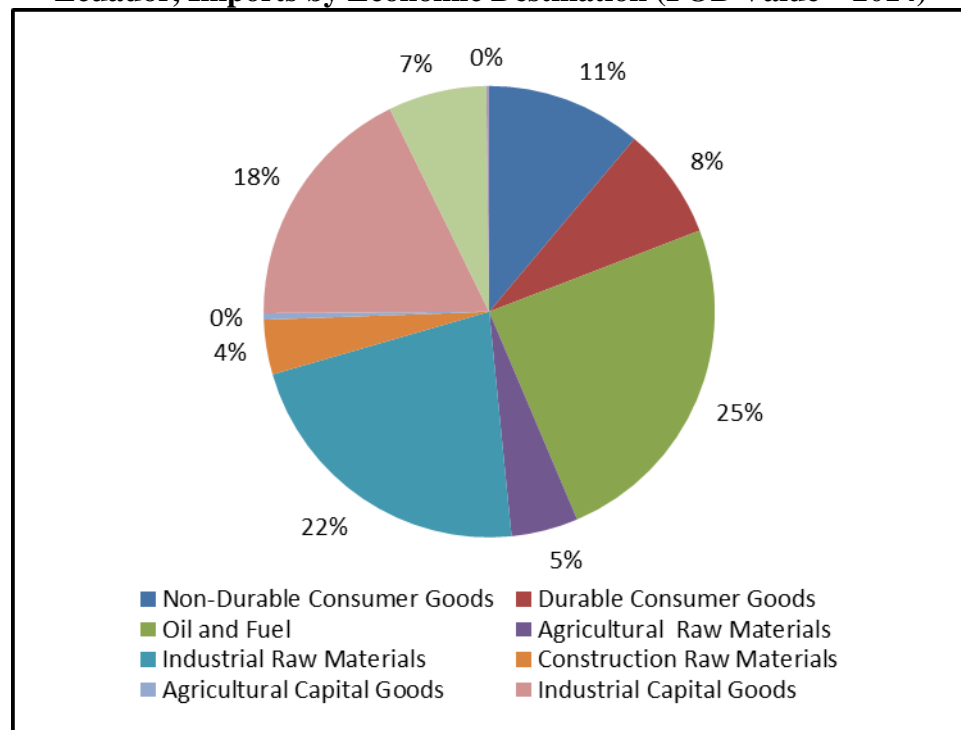
Ecuador is a major exporter of agricultural and fishery products. Exports include bananas, shrimp, cut flowers, and cacao. With \$1.6 billion in exports in 2015 to the United States, Ecuador's exports are down \$91 million or five percent compared to 2014. We forecast U.S. bound exports in 2015 coming at about \$2 billion.

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



OBS: Latest full calendar year data 2014 (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 2014 (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"> • Appreciation for U.S. food quality and culture. 	<ul style="list-style-type: none"> • Import tariffs have increased for several consumer-oriented food products.
<ul style="list-style-type: none"> • Dollarization has brought a measure of economic stability for importers and improved consumer purchasing power. 	<ul style="list-style-type: none"> • 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.
<ul style="list-style-type: none"> • Local food processing industry is challenged to offer competitive market prices. 	<ul style="list-style-type: none"> • The Ecuadorian is a relatively small market, a constraining factor for U.S. exporters seeking large volume contracts.
<ul style="list-style-type: none"> • Consumers are increasing fast foods and grocery store purchases. 	<ul style="list-style-type: none"> • Import restrictive measures.
<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • U.S. exports are losing market share to Peru, Colombia and Chile, due to more favorable exchange rates and trade agreements
<ul style="list-style-type: none"> • The tourism sector is growing, creating HRI opportunities for U.S. food products. 	<ul style="list-style-type: none"> • Food product smuggling.

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, as well as 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/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 registration either directly or through a local partner.
- Request import permits when required.
- Forward to the importer copies of customs clearance documentation prior to shipment.
- Provide ongoing support to the importer to help build consumer demand.

Sanitary/Phyto-Sanitary (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/phyto-sanitary regulations and the inspection 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 to 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 registry for processed food products or a health certificate for animals, plants or their by-products that meets 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 Registration

All imported food products need a sanitary registration number prior to entry into the country. This is a complicated, time consuming procedure. The sanitary registration 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 registration 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:

- A (sworn) statement signed by a technical expert attesting that the product meets relevant national technical standards. In the absence of national technical norm, the importer must declare that the product meets international standards or manufacturer specifications.
- The manufacturer's certification or the product owner's authorization granting the importer permission to register the product.
- A certificate of free sale, sanitary/phyto-sanitary certificate, or an export certificate issued by the competent authority in the country of export.
- Certificates of good manufacturing practices, HACCP, and or of quality or safety.
- A signed technical report describing the product's processing procedures.
- Physical and chemical specification of the packaging/container material.
- A product label affixed with a Spanish-language sticker that meets INEN technical standards. Nutrition table statements must be supported by a signed technical report issued by the manufacturer's quality control lab or by an Ecuadorian Accreditation Agency accredited lab.
- Along with a stability study/card, a signed technical declaration of the product's shelf life or its maximum consumption time, as well as preservation and storage conditions is required.
- A phyto-sanitary 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 count with corresponding organic certification.

Prior to requesting a sanitary registration, 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 registration 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 registration regulation provides a registration exemption for food products and ingredients that are utilized by local food manufacturers in final products that

count with their own sanitary registration. To be eligible to import product under this provision, the product must count with 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

The importer must request prior to shipment an import permit from AGROCALIDAD. The exporter must provide the importer with the official country of origin health certificate. For U.S.-origin animal and plants, and their derived products, Ecuador only accept 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.

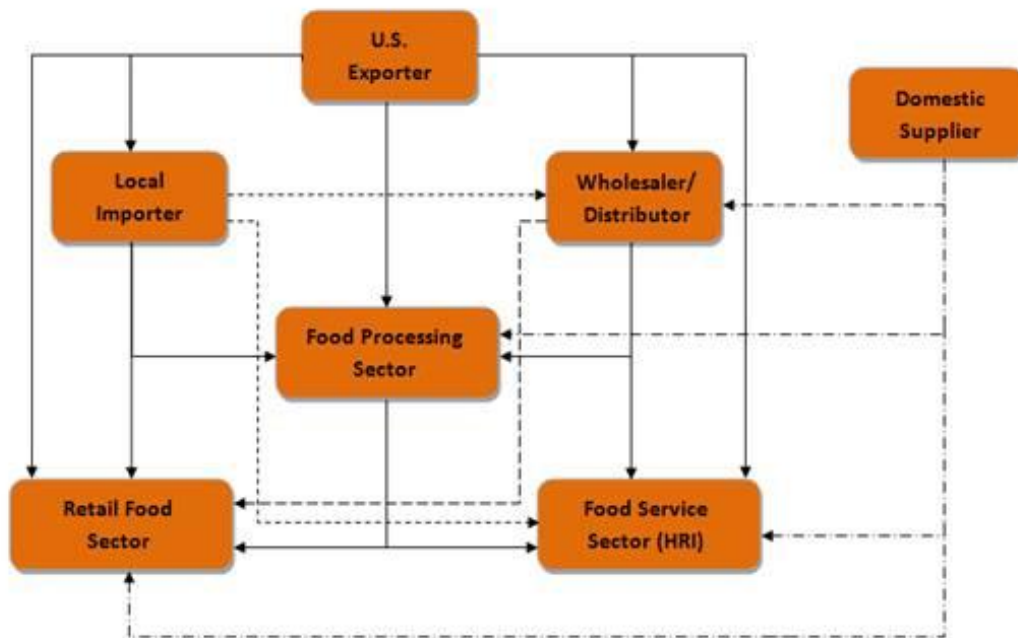
Labeling Requirements

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](#), as well as 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 requirement.

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.

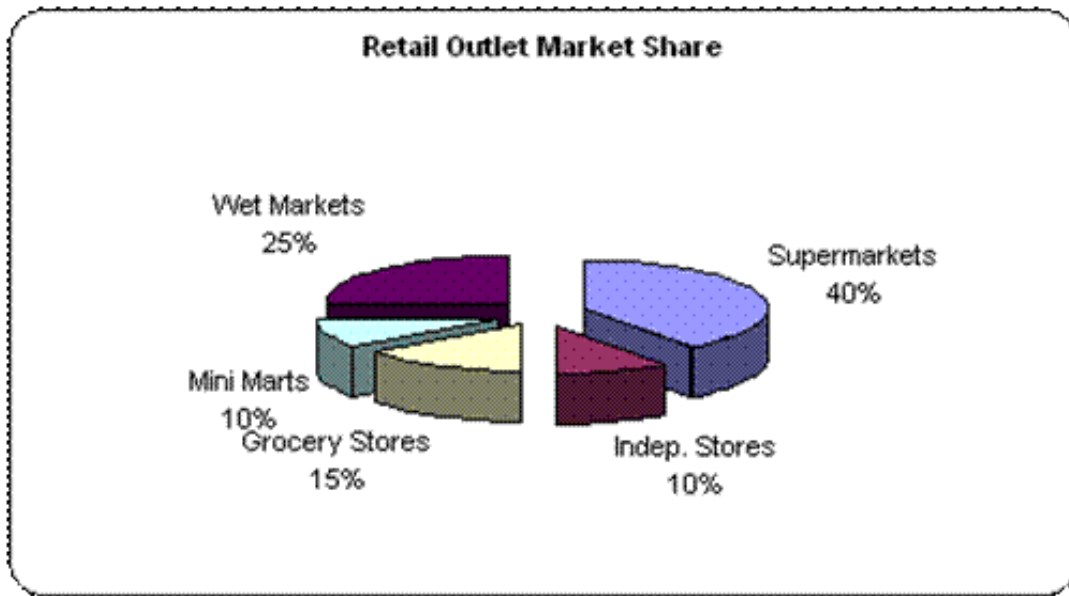


Ecuador's retail food sector is divided into five main categories: supermarket chains, open or wet markets, independent groceries, small food stores, and convenience stores (i.e., mini-marts). Retailers are known to request from suppliers lower prices, in order obtain higher sales margins. Alternatively 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 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 to the stores' cleaner, more organized format and greater imported product availability.



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 also Mother's and Father's Days. Demand for consumer-ready products also peaks during the tourist season (June-September).

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.

HRI Food Service Sector

Although commencing from a low base, consumer spending in restaurants and eating out is expected to grow over the next couple of years. FAS Quito estimates that during 2012-15, restaurant spending will grow by about eight percent. 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 2013 are estimated at 1.4 million and anticipated to hit the 2 million mark in 2015. 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 Volume	2014 Import Sales	5-Yr. Avg. Annual Import Growth base in Value	Import Tariff Rate	Key Constraints Over Market Development	Market Attractiveness for USA
Fresh Fruits	2.5 million MT	\$127.8 million	10% 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.
Dried Fruits and Nuts	4,562 MT	\$18.7 million	14%	15-25%	Chilean suppliers benefit from long established relationships with local importers.	Demand is growing. Importers are interested in different types of nuts.
Chocolate	12,671 MT	\$40.2 million	19% per annum	30%	Local production, especially of dark chocolate is up.	Unmet demand for product diversity. U.S. brands are well known.
Sugar Confectionery Products	65,889 MT	\$45.2 million	16% per annum	20%	Colombia benefits from competitive prices and shipping proximity.	Growing demand for elaborate confectionary products. Local sugar prices are high.
Bakery Products, noodles and pasta	172,324 MT	\$102 million	7% 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.
Teas and infusions	3,041 MT	\$5.7 million	18% per annum	30%	Strong local and EU competition.	The United States is the traditional supplier of teas and infusions.
Frozen Produce	733	\$1.0	18%	25%	Lack of cold chain	Shipping proximity.

	MT	million	per annum. Immature Market		infrastructure. Quality misperceptions.	Nascent demand.
Precooked, ready-to-eat frozen meals	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.
Specialty Beers	316 million liters	\$6.1 million	15%	Varies by alcohol content	Local production. Government aims to limit consumption.	Strong importer interest for alternative, non- pilsner beer styles.
Spirits and Liqueurs	125 million liters	\$9.3 million	-10% 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 2014 (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

For additional information, see 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

Instituto Nacional de Estadísticas y Censo

Website: www.inec.gob.ec

Ministerio de Agricultura, Ganadería, Acuacultura y Pesca

Website: www.agricultura.gob.ec

AGROCALIDAD

Website: www.agrocalidad.gob.ec

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

Website: www.controlsanitario.gob.ec/

INEN

Website: www.normalizacion.gob.ec/

APPENDIX - STATISTICS

Table A: Key Trade and Demographic Information

Agricultural Imports From All Countries (\$Mil) / U.S. Market Share (%) ^{1/}	\$2.7 billion/ 20.4%
Consumer Food Imports From All Countries (\$Mil) / U.S. Market Share (%) ^{1/}	\$776 million/ 10.2%
Edible Fishery Imports From All Countries (\$Mil) / U.S. Market Share (%) ^{1/}	\$128 million/ 3.57%
Total Population (Millions) / Annual Growth Rate (%)	15.8 million/ 1.35%
Urban Population (Millions) / Annual Growth Rate (%)	63.7%
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)	\$11,792 PPP
Unemployment Rate (%)	5%
Per Capita Food Expenditures (U.S. Dollars)	\$906
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 2014
		2012	2013	2014	2012	2013	2014	
23	Food Industry Residues & Waste; Prep Animal Feed	420	504	628	216	230	210	33%
10	Cereals	369	319	361	64	68	108	30%
21	Miscellaneous Edible Preparations	188	206	220	24	25	31	14%
15	Animal Or Vegetable Fats, Oils Etc. & Waxes	172	195	163	1	2	1	1%
08	Edible Fruit & Nuts; Citrus Fruit Or Melon Peel	126	138	150	16	18	14	10%
03	Fish, Crustaceans & Aquatic Invertebrates	183	111	124	3	2	4	3%
19	Prep Cereal, Flour, Starch Or Milk; Bakers Wares	110	125	102	3	6	4	4%
17	Sugars And Sugar Confectionary	84	63	71	4	3	4	5%
20	Prep Vegetables, Fruit, Nuts Or Other Plant Parts	48	55	53	6	7	4	8%
07	Edible Vegetables & Certain Roots & Tubers	37	42	48	1	1	1	2%
22	Beverages, Spirits And Vinegar	67	50	42	6	3	2	5%
18	Cocoa And Cocoa Preparations	33	38	41	4	4	7	18%
11	Milling Products; Malt; Starch; Inulin; Wht Gluten	44	46	37	1	0	0	0%
04	Dairy Prods; Birds Eggs; Honey; Ed Animal Pr NESOI	28	31	31	3	3	1	5%
12	Oil Seeds Etc.; Misc Grain, Seed, Fruit, Plant Etc.	25	25	28	9	10	10	36%
05	Products Of Animal Origin, NESOI	15	19	22	7	9	10	48%
02	Meat And Edible Meat Offal	31	26	21	6	9	7	34%
01	Live Animals	17	18	19	2	2	3	15%

06	Live Trees, Plants, Bulbs Etc.; Cut Flowers Etc.	12	15	15	1	1	1	8%
09	Coffee, Tea, Mate & Spices	18	15	11	0	0	0	2%
16	Edible Preparations Of Meat, Fish, Crustaceans Etc.	11	13	10	2	2	1	13%
13	Lac; Gums, Resins & Other Vegetable Sap & Extract	7	8	8	2	2	2	28%
14	Vegetable Plaiting Materials & Products NESOI	1	1	1	0	0	0	12%
	Grand Total	4057	4076	4219	2393	2419	2442	12%

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	2012	2013	2014	% Share 2014	% Change 2014/13
Chile	212	230	219	28.2%	-4.6%
Colombia	124	137	135	17.3%	-2.1%
Peru	100	107	130	16.7%	21.8%
United States	75	82	79	10.2%	-3.6%
Mexico	32	36	29	3.7%	-20.2%
Brazil	31	26	23	3.0%	-10.7%
China	14	23	23	2.9%	0.9%
Spain	10	17	23	2.9%	31.2%
Netherlands	13	18	21	2.7%	15.4%
Argentina	13	12	11	1.5%	-4.9%
Costa Rica	13	13	11	1.5%	-10.1%
Italy	6	6	10	1.3%	57.2%
Belgium	10	9	9	1.1%	0.4%
Germany	5	6	7	0.9%	22.3%
Singapore	3	5	6	0.8%	39.6%
Total top 15	660	725	735	94.7%	1.4%

OBS: Latest full calendar year data 2014 (January-December).
Source: Global Trade Atlas (Consumer-Oriented Agricultural Total, Group 32).