

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Exporter Guide

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Approved By:

Emiko Purdy

Prepared By:

Andres Barahona and
Mariano J. Beillard

Report Highlights:

Ecuador despite economic and political uncertainty continues to offer exporters of U.S. food and agricultural products good opportunities. Consumers, especially younger consumers are demanding greater quantities of processed food products. Purchasing power among lower- and middle class consumers is growing.

Post:
Quito

Author Defined:

SECTION I. MARKET OVERVIEW

The Republic of Ecuador offers a number of good opportunities for U.S. exporters of food and agricultural products. Its population of 15.4 million inhabitants (Central Intelligence Agency, July 2013 est.), is growing at 1.4 percent per annum with a medium age of 26.3 years. Younger lower- and middle-class consumers are seeing their purchasing power improve, drawing them to imported processed food products. Limiting consumption however is 40 percent underemployment among a labor force of 4.8 million, despite an official unemployment rate of 5 percent

Ecuador is dependent on petroleum extraction, which account for half of the country's export earnings and two-fifths of its public sector revenues. The state remains at the center of the national economy as growth is driven by public spending and investment. A fall in oil prices will likely force Ecuador to take on new debt to finance further social spending.

Despite recent good economic growth, President Rafael Correa's (reelected 2013) administration continues to generate uncertainty. Private investment suffered with the 2008 default on Ecuador's sovereign debt and the 2009 announcement of the intent to terminate 13 bilateral investment treaties, including one with the United States. With access to international financial markets limited, China has become Ecuador's largest lender (\$10 billion); Ecuador services the debt through oil shipments.

Economic growth in 2012 at 5 percent was down 3 percent compared to 2011; but much better than the 1 percent growth registered in 2009 at the height of the global financial crisis which was then accompanied by a sharp decline in oil prices and remittances. Growth is once again expected to slow through 2014; conservatively estimated at 4 percent in 2013 and forecast at 4.2 percent in 2014.

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

	2012	2013	2014
	Actual	Estimation	Forecast
Nominal GDP (\$ billions)	84.0	90.2	103.7
Real GDP Growth	5.1	4.0	4.2
Consumer Price Inflation		2.6	3.6
Imports of Goods and Services (\$ billions FOB)	24.5	26.2	28.7
Private Consumption (% real change)	4.0	4.3	4.5

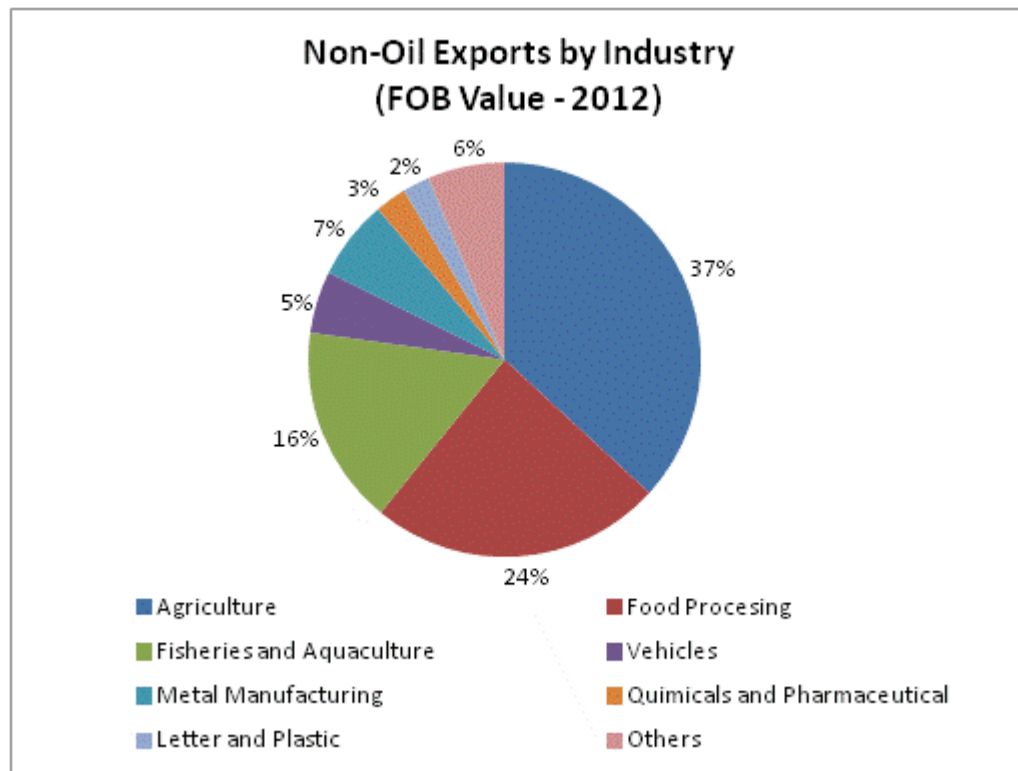
Public Sector Consumption (% real change)	7.7	4.5	3.0
Exports of Goods and Services (\$ billions FOB)	24.6	25.6	28.0
Unemployment Rate		4.9	5.1
Short-term Interest Rate	8.2	8.7	8.8

Sources: Economist Intelligence Unit, CIA,

The United States maintains an import market share of 28.4 percent market share (followed by China with 11.3 percent). U.S. market share of imported food and agricultural products alone is 19 percent. Imported products however face competition as local food processors increasingly target consumers.

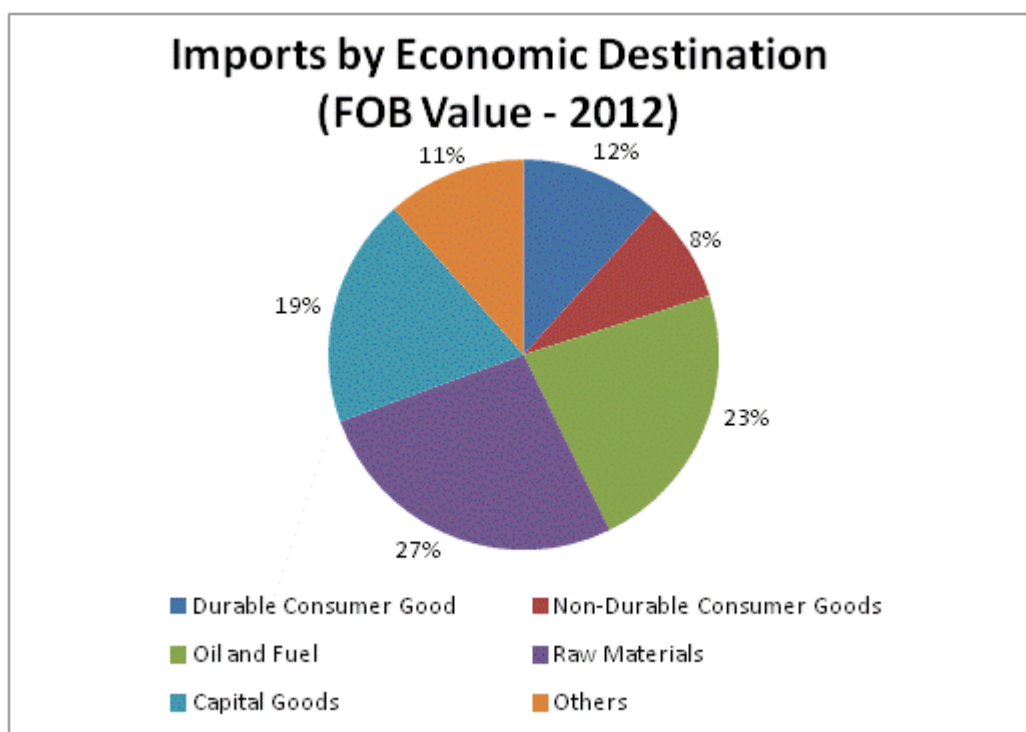
General and Agricultural Export-Import Trade Situation

Beyond crude oil exports, Ecuador is major exporter of agricultural products such as bananas, shrimp, cut flowers, and cacao. In 2012 (latest full year data), the United States imported roughly \$1.8 billion in food and agricultural products from Ecuador; accounting for 8 percent of the country’s total (agricultural and non-agricultural) exports of \$23.7 billion. Ecuador’s food and agricultural products exports in 2012 to the world reached \$5.9 billion. Through October 2013, U.S. imports of food and agricultural products from Ecuador at \$1.6 billion are already up over 4 percent compared to the same period in 2012.



Source: Central Bank of Ecuador (Banco Central del Ecuador).

Ecuador’s total (agricultural and non-agricultural) imports reached roughly \$24 billion in 2012. Of this amount, about \$6.5 billion were imports of U.S.-origin products. U.S. food and agricultural products exported to Ecuador in 2012 reach over \$481 million (their highest level since 1970). Through October 2013, U.S. exports of food and agricultural products to Ecuador at \$354 million are down over 8 percent compared to the same period in 2012. FAS Quito attributes the drop to weaker domestic demand in 2013. The Correa administration’s economic policies create market distortions leading to upward price pressures. Sources report that while public subsidies for some basic goods assist in controlling inflation, Ecuador remains nonetheless vulnerable to international food commodity price spikes despite its dollarized economy.



Source: Central Bank of Ecuador (Banco Central del Ecuador).

The Central Bank of Ecuador reports that in 2012 imports (based on economic destination) of consumer goods were up nearly 2 percent compared to 2011. Similarly imports of capital goods saw an increase of over 10 percent; oil and fuel imports also increased nearly 7 percent. However, imports of raw materials decreased by about 1 percent compared to 2011 levels.

However, the Central Bank of Ecuador does clarify that imports of consumer goods by volume did nevertheless decrease nearly 8 percent in 2012. Imports of capital goods by volume were only up 2 percent compared to 2011; similarly oil and fuel imports grew only by 1 percent. Imports of raw materials by volume were also down nearly 2.5 percent in 2012.

Imports in terms of FOB value in 2012 showed a slight upswing. Imports of non-durable consumer goods at \$2 billion were up by 0.6 percent compared to 2011. Similarly imports of durable consumer goods at \$2.8 billion were up by over 2.5 percent compared to 2011.

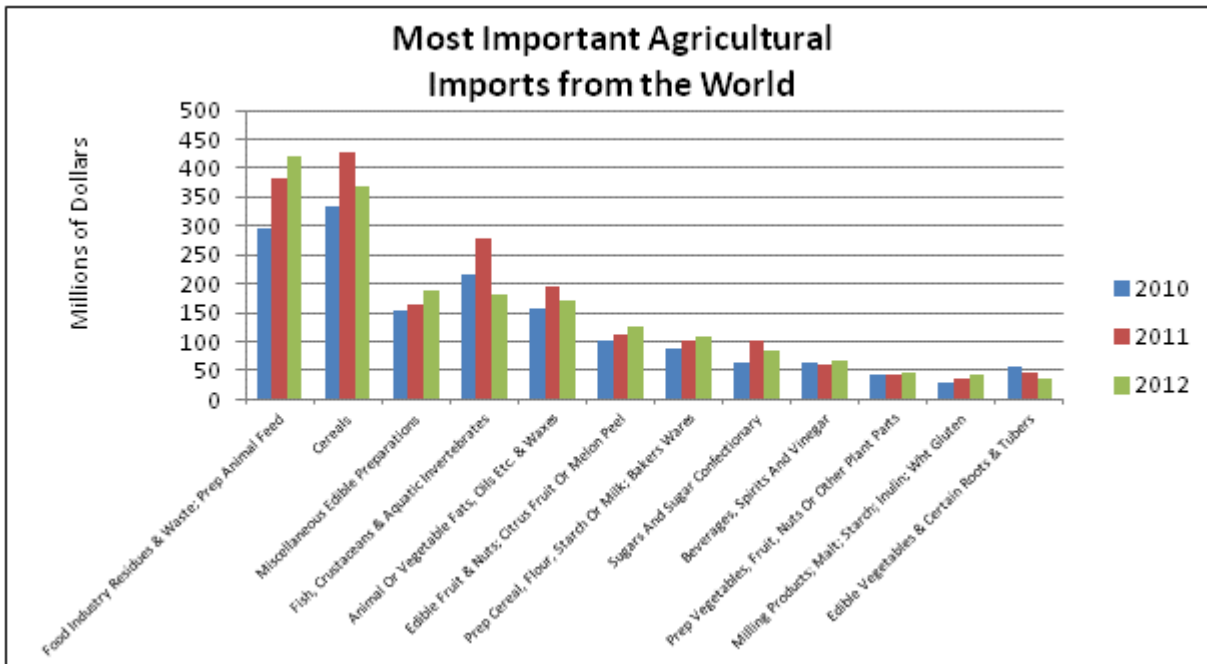
Table 2: Imports Evolution: Consumer Goods(Value, Quantity and Unit Price) 2011- 2012

%Market Share	Share	Increase (+) / Decrease (-)		
		Value	Volume	Unit Value
20.09%	Totals			
	Consumer Goods	1.75%	-7.95%	8.34%
8.43%	Non-Durable Consumer Goods	0.62%	-5.46%	6.43%
11.67%	Durable Consumer Goods	2.58%	-8.80%	12.47%

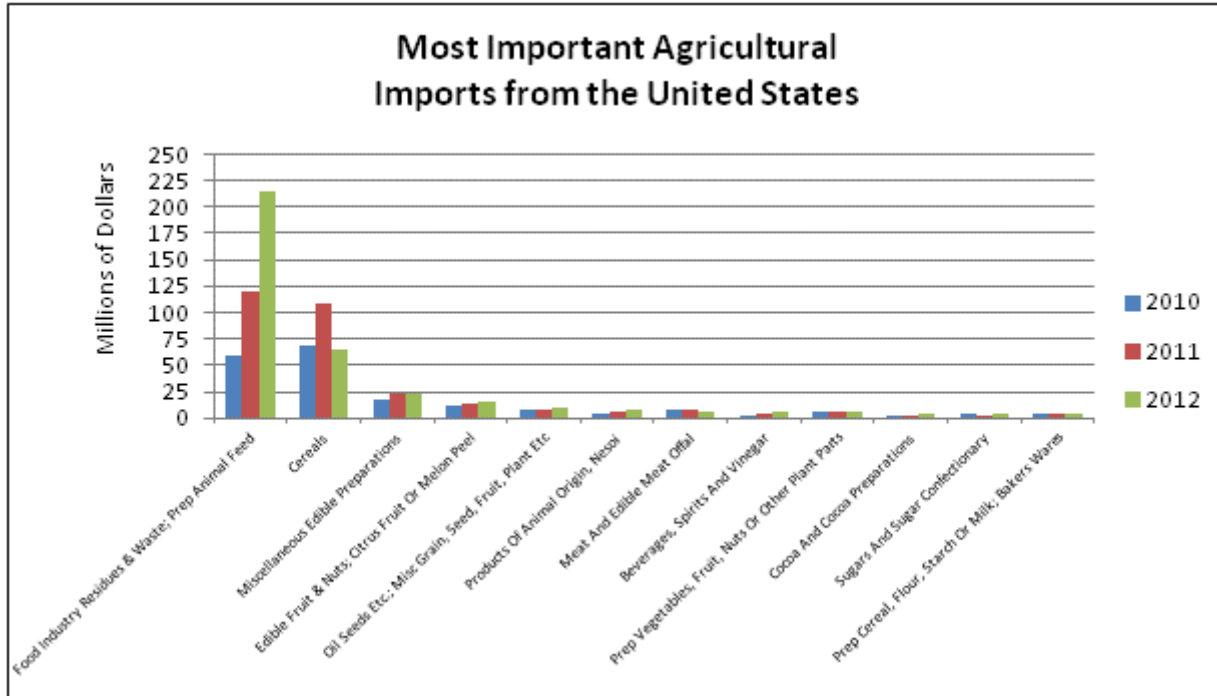
Source: Central Bank of Ecuador (Banco Central del Ecuador), Monthly Statistics.

Agricultural Imports from the United States and the World

FAS Quito finds that Food Industry Residues and cereals products remain the most important imported products although Cereals suffer a decrease of 40.11 percent. Soy bean meal was the most important agricultural product imported.



Source: Global Trade Atlas, U.S. Department of Agriculture (USDA).



Source: Global Trade Atlas, U.S. Department of Agriculture (USDA).

ADVANTAGES	CHALLENGES
Appreciation for U.S. food quality and culture.	Import tariffs have increased for several consumer-oriented food products.
The dollarized economy has brought a measure of economic stability for importers. Consumers, for their part are benefitting from greater purchasing power thanks to dollarization.	As economic resources have been redistributed, middle and high income groups have seen their incomes decrease. Consumption of less affordable imported food and beverage products may slow.
Local food processing industries largely still do not offer competitive market prices.	The Ecuadorian market is relatively small, a constraining factor for U.S. exporters seeking large volume contracts.
Consumers are increasingly changing their habits, increasingly demanding greater quantities of fast foods and grocery store purchases.	A weak dollar causes drives up local prices of most food products.
Ecuadorians overseas have adopted many foreign consumption tastes. These are now being diffused to their families in Ecuador, creating niche markets for imported (U.S.) food products.	U.S. companies are losing market share to competitors in Peru, Colombia and Chile, which benefit from favorable exchange rates and trade agreements
Strong tourism sector growth is creating new	Smuggling of food products continues to remain

opportunities for the HRI sector and the food products.	a problem.
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SECTION II. EXPORTER BUSINESS TIPS

Supermarket chains market imported food products mainly to middle- and high-income consumers. FAS Quito recommends that exporters of U.S. food and agricultural products contact large importers, wholesalers/distributors or supermarkets directly.

- U.S. exporters can approach Gas Marts, grocery and mom-and-pop stores through major local suppliers (wholesalers/distributors).
- Be diligent when selecting a partner (an agent or a representative) in Ecuador. Personal visits/meetings are highly recommended. Conduct a background check of the prospective partner before signing permanent contractual arrangement.
- The local partner should be able to provide updated information on consumer trends to identify niche markets, current market development (merchandising, point of sale and promotion activities), and business practices.
- Negotiating power of major supermarkets towards food suppliers is strong.
- Suppliers to major supermarkets have wide range of distribution channels ranging from those for fancy foods to those for foods for mass consumption.
- Major food importers/distributors supply all major supermarket chains and provincial retailers. It should be noted that major supermarket chains usually request product exclusivity to new suppliers.
- Food is primarily imported in mixed containers.
- Major supermarket chains prefer to import expensive high-end products directly in order to earn higher margins.
- Distributors and wholesalers make constant in-store promotional activities. They count with support personnel in every store and all distribution channels.
- Research information by product with shipping consolidators and with U.S. ports statistics. This information will help indicate Ecuadorian consumers' preferences.
- Ecuadorian supermarket chains prefer to import directly from producers. However, U.S. companies that want to export for the first time should contact brokers/local importers to facilitate the process.

- The food sector in Ecuador at the retail level can be divided into five categories: supermarket chains, open or wet markets, independent groceries, small food stores, and convenience stores known as mini-marts.
- Importers for the supermarket chains require that U.S. exporters have all permits and licenses needed, as well as the logistic arrangements necessary for products at the port of departure.
- Any person or company that wants to import in Ecuador must obtain an import permit (DUI or Unique Document for Imports), and, if applicable, the importer must have authorization from the Ministry of Agriculture or the Ministry of Public Health.
- Importers usually search for competitive conditions in prices and quality. However prices are not always constrained as there are niche markets for many high-value products for high-income consumers.
- Brand loyalty is common in Ecuador; exporters seeking to market new-to-market products will need to demonstrate their products' benefits through advertisement. The use of point-of-purchase (POP) material is recommended as well as promotional campaigns and samplings.
- Ecuadorian eating habits have changed dramatically in recent 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.
- There is fierce competition among distributors for new consumers. In order to gain market share, some distributors permanently place new products in discount stores where prices usually are between a 10 percent and 20 percent lower.
- Thanks to strategic alliances with producers, supermarkets are carrying evermore store branded products that allows them to offer more competitive prices.
- Based on sales, the main supermarket chains in Ecuador, representing approximately 60 percent of the sector, are La Favorita (Supermaxi), and El Rosado (Mi Comisariato). Tiendas Industriales Asociadas, Mega Santa Maria, and Supermercados Coral are medium-sized supermarket chains that are growing fast and obtaining an important market share.

Road Map for Market Entry

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

- First identify the channel of distribution that will best fit the company's market strategy.
- Depending of the channel chosen, identify a strategic partner that will import the product.
- Obtain the sanitary registration, if needed, either directly or through a local partner.
- Request import permits when required.

- Send to the importer copies of all required customs clearance documentation prior to shipment.
- Provide ongoing support to the import partner to help build consumer demand.

Sanitary and 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 forms 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 animal and plant origin products. The National Institute for Standardization and Norms (INEN) is the agency in charge of 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:

- Unique Customs Declaration (DAU) form
- Commercial invoice
- An airway bill or bill of lading
- Packing list
- Insurance letter
- Certificate of origin
- A food sanitary registry from ARCSA for food processed products or a health certificate for animals, plants or their by-products that complies with AGROCALIDAD's import requirements.

When the customs agent transmits the DAU physically and electronically, SENAE determines which of the 5 inspection control channels it will subject the imported product. Control measures can include everything from a simple documentation review to the physical inspection of the imported products.

If the products don't match the description on the DAU, these can be confiscated. SENAE however often permits the re-export of products. FAS Quito cautions exporters not to send samples or extra promotional items not included on the DAU. Any discrepancies between the DAU and shipment will lead to delays and possible confiscation of the shipment.

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 include the following documents:

- Request form (filled at the national sanitary registration electronic system web page).
- A copy of the identification document (in the case of a natural person), or a certificate of company registration accompanied by the legal representative's appointment (in the case of a company).
- The Certificate of Free Sale issued by a competent health authority in the exporting country. This document must list the products to be registered and must state that the products are authorized for free sale and consumption in the country of origin. In the United States, this document can be obtained at the Health Services Department of the state where the manufacture plant is located.
- Stability Study which justifies the product's shelf life or maximum consumption time accompanied by the signature of the responsible technician (Stability Card).
- Chemical specifications of the container/packaging.
- Product's original label and draft of the tag that complies with the requests of the corresponding INEN Technical Regulation.
- Certificate that the product comes from an authorized manufacturer or distributor, except when the manufacturer is requesting the registration.
- Invoice of registration fees payment (approximately US\$620.00 per item).

Notes:

- All documents and certificates written in languages other than Spanish must be translated.
- All official certificates and documents must be either legalized by the Ecuadorian Consulate of jurisdiction in the country of export or authenticated through an [*Apostille certificate*](#).
- FAS Quito advises that Sanitary Registrations be filed with the Quito ARCSA office rather than ARCSA Guayaquil office, due to the latter's administrative and compliance problems.
- A new sanitary permit will be necessary in the following events:
 - If there is a change in the product composition
 - The product needs a different conservation process
 - There is a substantial modification of colorings, flavorings, sweeteners, conservation agents, and nutritional additives
 - Changes in the nature of the container

- Change of manufacturer

FAS Quito anticipates that the foregoing procedures and requirements will change in early 2014 once new regulations are issued.

Certificates for Animals, Plants, and their By-products

Prior to product shipment, the Ecuadorian importer must request an import permit from AGROCALIDAD. The exporter must provide the importer with the official country of origin health certificate (including the specific certification requirements of AGROCALIDAD).

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 meats and their by-products.

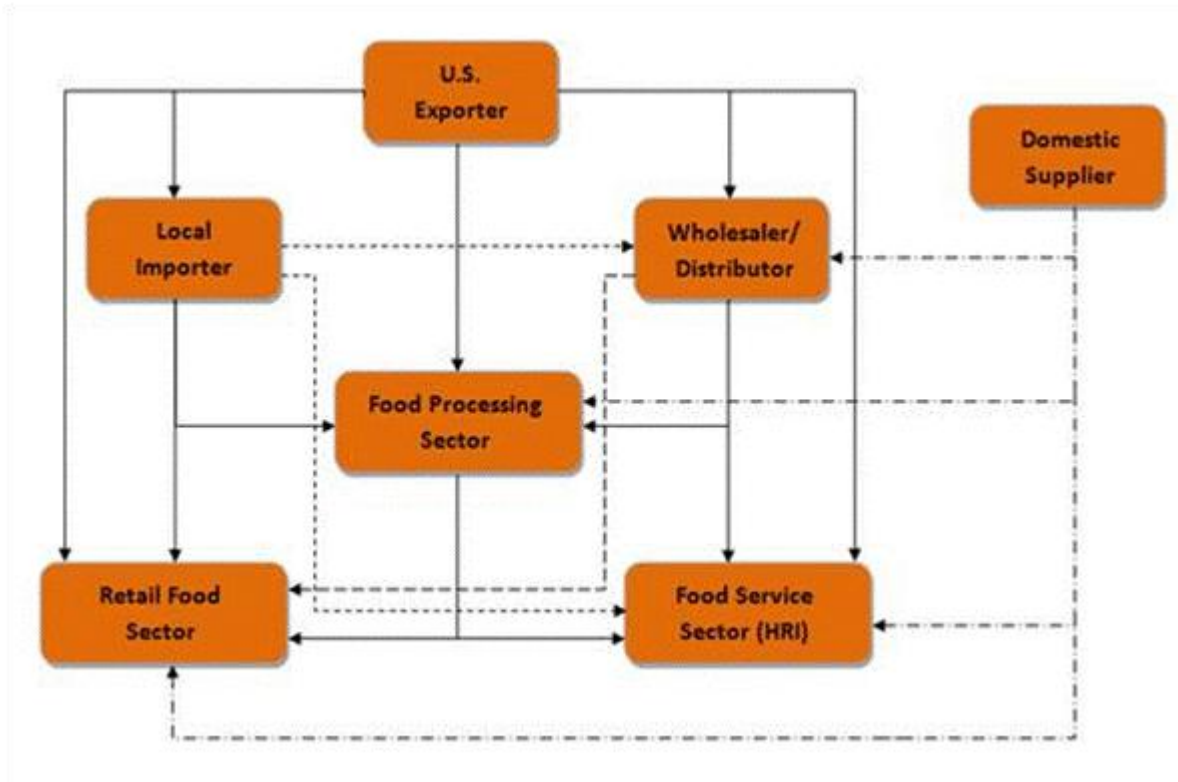
Labeling Requirements

Imported packaged foods must carry a separate adhesive label before reaching the point of sale. A Spanish translation of the label must include all the information requested at the technical standard norms [NTE INEN 1334-1:2011, NTE INEN 1334-2:2011, and NTE INEN 1334-3:2011.](#)

FAS Quito anticipates new norms being issued in the near-term given recent changes to Ecuador's regulations regarding nutritional information and transgenic content labeling

SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

Market Structure



To the extent that the distribution channels for a product are well established, new entrants must focus on the retail sector. New to market entrants can attempt to convince retailers to accept their products through lower prices and increased profit margins, sharing costs of promotion, engaging in joint promotional efforts at the point of sale, among others. When it is not possible to penetrate the existing distribution channels, the new to market product acquires its own cost distribution structure.

Distribution channels can be different between local and imported products. Often food retail companies seek to import directly in order to bypass brokers and maximize their profits. However, retailers do often buy from local importers that represent one or more foreign suppliers. This especially the case when food products offered have strong demand.

Companies with low sales volume and import directly face high costs as the conditions and procedures for importing can be difficult. For these companies, working with a local wholesaler will make the import process easier.

The local food processing companies usually have their own distribution chain which contains wholesalers, self-service, traditional retailers and to a lesser extent the institutional (HRI catering). There is a small portion of companies that have outsourced the distribution to certain provinces.

Retail Food Sector



- Approximately 48 percent of Ecuadorians (7.15 million people) buy food in a grocery store, with an average monthly expenditure of \$250. The highest percentage of supermarket customers is found among the population with middle to high incomes; combined they represent approximately 36 percent of Ecuador's population.
- The two largest supermarket chains, Supermaxi, and Mi Comisariato account for the majority of food sales in this segment. On average, 18 percent of the available shelf space is dedicated to imported foods and beverages, such as fresh fruit, prepared or canned fruits and vegetables, frozen items, snacks, confectioneries, wine, juices, beer, and more recently, diet products.
- Mini-marts tend to offer imported and specialty products such as cigarettes, liquors, snacks, and soft drinks.
- The best way to enter this sector is through direct contact with supermarkets using local importers and distributors who usually require exclusive contracts, which tends to increase costs, thus making the product less competitive.
- Sales usually increase during special holidays such as Mother's Day, Christmas, Carnival, Valentine's Day, and Father's Day. Demand for most consumer-ready products usually peaks during the tourist season (June-September).
- The number of supermarkets and self-service stores are increasing as people turn to these stores in order to get a wider variety of products in a more organized and cleaner shopping environment. Such stores offer the best sale opportunities for imported products.

Market Sizes

Table 3: Ecuador, Food, Beverages and Tobacco Consumption

	2006 ^a	2007 ^a	2008 ^a	2009 ^b	2010 ^b	2011 ^c	2012 ^c	2013 ^c	2014 ^c	2015 ^c
Food, beverages & tobacco (consumer expenditure; US\$)	6,969	7,530	8,604	9,035	10,170	11,082	12,035	13,083	14,233	15,476
Food, beverages & tobacco (% of household spending)	26.0	26.0	26.0	26.0	25.9	25.9	25.7	25.4	25.2	24.9
Food, beverages & tobacco (market demand; US\$ m) ^d	43,882 ^b	45,072 ^b	50,332 ^b	53,664	60,355	65,428	71,916	79,254	87,401	96,371
Food, beverages & tobacco (market demand; % real growth) ^d	19.8 ^b	-1.5 ^b	4.5 ^b	0.8	7.1	6.0	6.8	6.2	6.1	6.1
Meat consumption (kg per head)	41.1	41.2	42.6	42.4	42.7	43.9	44.7	45.5	46.4	47.3
Fish consumption (kg per head)	4.5	4.5	4.6	4.6	4.7	4.8	4.9	5.0	5.1	5.2
Fruit consumption (kg per head)	163.0	164.8	168.5	167.7	171.9	175.5	179.2	182.5	186.0	189.5
Vegetable consumption (kg per head)	24.9	25.0	25.4	25.3	25.4	25.7	26.0	26.2	26.4	26.7
Milk consumption (liters per head)	106.9	108.2	111.1	111.5	114.0	116.6	119.0	121.3	123.6	126.0
Coffee consumption (kg per head)	4.0	4.0	4.1	4.2	4.3	4.3	4.4	4.5	4.5	4.6
Tea consumption (kg per head)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

^a Actual. ^b Economist Intelligence Unit estimates. ^c Economist Intelligence Unit forecasts. ^d Excludes retail and wholesale mark-up.

Source: Economist Intelligence Unit of The Economist..

Monthly Consumption Expenditure Per Capita 2011 - 2012	
Group and type of expenditure	
Food and non-alcoholic beverage	\$ 38
Alcoholic beverage, snuff and drugs	\$ 1
Clothing and footwear	\$ 12
Housing, water, electricity, gas and other fuels	\$ 12
Furnishings, household equipment and routine maintenance	\$ 9
Health	\$ 12
Transport	\$ 23
Communications	\$ 8
Recreation and culture	\$ 7
Education	\$ 7
Hotels and Restaurants	\$ 12
Miscellaneous goods and services	\$ 16
Total expenditure per capita	\$ 157

Source: National Institute of statistics and census, www.inec.gob.ec

Monthly Current Consumption Expense of Ecuadorian Families	
Group and type of expenditure	Total
Current Consumption Expense	\$ 2,393,571,816.00
Food and non-alcoholic beverages	\$ 584,496,341.00
Food	\$ 523,568,622.00
Bread and cereals	\$ 109,894,753.00
Fresh and frozen meat	\$ 114,566,977.00
Fresh and Frozen Fish and seafood	\$ 33,655,624.00

Milk and eggs derived	\$	81,731,008.00
Oils and fats	\$	20,860,195.00
Fruits	\$	53,426,619.00
Vegetables, vegetables, legumes and tubers	\$	76,209,783.00
Sugar, jam, honey, chocolate and confectionery	\$	20,817,139.00
Foodstuffs (N.O.S.)	\$	12,406,524.00
Non Alcoholic beverages	\$	60,927,718.00
Coffee, tea, cocoa and herbs	\$	6,275,327.00
Mineral waters, soft drinks, juices, fruit juice and vegetables	\$	54,652,391.00
Alcoholic beverage, snuff and drugs	\$	17,303,834.00
Alcoholic beverage	\$	12,397,109.00
Distilled beverages	\$	2,166,057.00
Wines	\$	187,684.00
Beers	\$	10,043,368.00
Snuff	\$	4,892,179.00
Drugs	\$	14,546.00

Source: National Institute of statistics and census, www.inec.gob.ec

Food Processing Sector

- Due to fluctuations in the exchange rate between the U.S. dollar and the Latin American currencies, ingredients for food processing are often imported from Colombia, Chile, and Mexico.
- The products most in demand for this sector are: processed sugar, concentrated ingredients flavors, juice concentrates and mixtures, colorants, cereals, meats, ferments, flours, and food extracts.
- A successful sales strategy for processed food products in Ecuador is the diversification of product lines. For example, Pronaca, Ecuador's leading company in this sector has a portfolio with over 800 products and 26 brands.
- The main processed food products in the market are pre-cooked or easy to prepare products for which many ingredients and seasonings are imported.
- Food producers are also diversifying their products. Tecnopeca de Manta, a fishing company, is now manufacturing processed foods like soup and new seafood dishes.
- The beverage sector has focused on improved distribution channels to extend its coverage while simultaneously launching new products, as is the case of SAB Miller which owns Ecuador's largest local brewery.

HRI Food Service Sector

- Although commencing from a low base, consumer spending on restaurants and eating out is expected to grow rapidly. FAS Quito expects it to rise by an annual average of 8.4 percent

between 2012 and 2015.

- Growth in the tourism industry continues to represent a key opportunity for the HRI sector. Tourist numbers in 2012 at over 1.2 million were up 11 percent compare to 2011.
- Most restaurants are supplied by a combination of local producers and importers. The only exceptions are the big hotel chains that manage direct imports through agents in the country of origin.
- Consumer-oriented products with the greatest demand are: meats, shell-fish, salmon, mussels, squid, wine, beer, liquor, olive oil, truffles, canned tomatoes, confectioneries, sausages, pre-cooked frozen potatoes, cheese products, and spices.
- The most important franchises in Ecuador are 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.
- Domestic demand for fast food is growing. Most of the major US fast food chains are represented in Ecuador, although they are concentrated in the large urban centers.
- Most products used by franchise restaurants are imported and include: mayonnaise, ketchup, mustard, beef, poultry, spices, special ingredients, cheese, pepperoni, bacon, olives, corn oil, frozen french fries, ice cream and yogurt mixes. However, most of these products are supplied by the franchise's global supplier.
- Wine is becoming an important product in the food and beverage sector; however, the majority of wine in Ecuador is imported. The primary exporters of wine to Ecuador are Chile and Argentina, followed by the United States, the European Union, and Australia. Chilean and Argentine wines face lower import tariffs compared to wines from other origins. FAS Quito finds that there is an increasing demand for wine especially in Ecuador's larger cities.

SECTION IV: BEST HIGH-VALUE PRODUCT PROSPECTS

Based on import statistics, as well as consumer preferences and Ecuadorian market trends, U.S. export opportunities reside with the following products:

- Soybean and sub products
- Sorghum and sub products for animal feed
- Wheat and meslin
- Frozen Fish
- Fresh Fruits such as apples, pears, peaches
- Bakery products and supplies for pastry
- Mineral water and other bottled waters

- Spirits and liqueurs
- Sugar confectionery including white chocolate
- Chocolate and other food preparations containing cacao
- Malt extract
- Teas
- Fats and Oils
- Food Waste for animal feed
- Mechanically deboned meat (MDM)
- Frozen produce
- Precooked frozen meals
- Ice cream
- Pork cuts and Pork products
- Low-calorie food products
- Specialty beers
- Soft drinks
- Energy Drinks
- Wine

SECTION V: KEY CONTACTS AND FURTHER INFORMATION

USDA\FAS – Office Agricultural Affairs, U.S. Embassy Quito

Tel: 593-2-3985323 • E-mail: AGQUITO@usda.gov

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, Acuicultura y Pesca

Website: www.agricultura.gob.ec

Agrocalidad

Website: www.agrocalidad.gob.ec

Table A: Agricultural Products, Consumer Food and Edible Fishery Product Imports (Million \$)

HS Code	Description	Imports from the World			Imports from the United States			U.S. Share 2012
		2010	2011	2012	2010	2011	2012	
23	Food Industry Residues & Waste;	294	383	420	59	121	216	51.33%

	Prep Animal Feed							
10	Cereals	334	429	369	69	108	64	17.48%
21	Miscellaneous Edible Preparations	155	164	188	18	24	24	12.64%
03	Fish, Crustaceans & Aquatic Invertebrates	216	280	183	0	1	3	1.51%
15	Animal Or Vegetable Fats, Oils Etc. & Waxes	156	196	172	2	10	1	0.76%
08	Edible Fruit & Nuts; Citrus Fruit Or Melon Peel	102	111	126	12	14	16	12.78%
19	Prep Cereal, Flour, Starch Or Milk; Bakers Wares	90	101	110	5	4	3	3.14%
17	Sugars And Sugar Confectionary	65	101	84	4	3	4	4.18%
22	Beverages, Spirits And Vinegar	65	60	67	2	4	6	8.65%
20	Prep Vegetables, Fruit, Nuts Or Other Plant Parts	43	44	48	6	6	6	11.87%
11	Milling Products; Malt; Starch; Inulin; Wht Gluten	29	36	44	3	1	1	1.60%
07	Edible Vegetables & Certain Roots & Tubers	58	47	37	1	1	1	3.79%
18	Cocoa And Cocoa Preparations	22	27	33	2	3	4	12.20%
02	Meat And Edible Meat Offal	26	33	31	8	8	6	20.26%
04	Dairy Prods; Birds Eggs; Honey; Ed Animal Pr Nesoi	25	22	28	2	3	3	10.91%
12	Oil Seeds Etc.; Misc Grain, Seed, Fruit, Plant Etc	21	23	25	8	7	9	36.19%
09	Coffee, Tea, Mate & Spices	15	30	18	0	0	0	1.98%
01	Live Animals	15	17	17	2	2	2	10.92%
05	Products Of Animal Origin, Nesoi	16	15	15	5	6	7	49.87%
06	Live Trees, Plants, Bulbs Etc.; Cut Flowers Etc.	11	13	12	1	1	1	7.18%
16	Edible Preparations Of Meat, Fish, Crustaceans Etc	13	12	11	1	2	2	17.38%
13	Lac; Gums, Resins & Other Vegetable Sap & Extract	7	7	7	3	2	2	23.48%
14	Vegetable Plaiting Materials & Products Nesoi	2	2	1	0	0	0	12.13%
	Gran Total	1,780	2,153	2,045	213	330	381	18.63%

Source: Global Trade Atlas (HS 2-digit).

Table B: Ecuador, Top 15 Suppliers, Consumer Foods (\$ millions), CY

Partner Country	2010	2011	2012	% Change 2012/2011
Chile	175	181	212	16.97%
Colombia	130	124	124	0.48%
Peru	88	99	100	1.74%
United States	59	73	75	2.88%
Mexico	24	28	32	13.80%
Brazil	24	31	31	2.09%

China	24	16	14	-10.40%
Netherlands	8	10	13	26.66%
Argentina	11	11	13	20.16%
Costa Rica	1	10	13	22.53%
Spain	7	8	10	19.03%
Belgium	6	8	10	16.07%
Uruguay	2	3	7	139.82%
Italy	5	4	6	28.72%
Germany	5	5	5	4.90%
Total top 15	569	611	665	8.83%

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