

**Required Report:** Required - Public Distribution

**Date:** December 15, 2023

**Report Number:** EC2023-0011

**Report Name:** Exporter Guide

**Country:** Ecuador

**Post:** Quito

**Report Category:** Exporter Guide

**Prepared By:** Andres Barahona

**Approved By:** Zeke Bryant

**Report Highlights:**

This report serves as a road map for U.S. companies exporting to Ecuador. While Ecuador is a challenging market for U.S. food and agricultural products, it is also one of opportunities. Domestic production cannot meet consumer demand, necessitating continued imports. Additionally, younger and lower to middle-income consumers' appetite for imported products continues to grow despite an often-challenging economic situation. The Ecuador-EU Free Trade Agreement continues to threaten the United States' market share in processed and fresh food products.

## Market Fact Sheet: ECUADOR

### Executive Summary

Exports of U.S. agricultural products to Ecuador jumped to a good start in 2023 but have since slowed down in the second half of the year. However, opportunities continue for some intermediate and consumer-oriented products. Domestic production still cannot meet consumer demand, necessitating continued imports. The Ecuador - European Union Free Trade Agreement (FTA) threatens the United States' market share in processed and fresh agricultural products.

Total U.S. – Ecuador bilateral agricultural and related product trade in 2022 totaled \$4.3 billion. Ecuador maintains a total agricultural trade surplus of \$2.8 billion. U.S. exports of food and agricultural products to Ecuador in 2022 totaled \$740.2 million, up \$165.5 million or 28 percent compared to 2021. Ecuador's demand for U.S. intermediate products (e.g., soybean meal and feed and fodder) and bulk (wheat) drove this increase.

### Food Processing Industry

Ecuadorian food processors tend to favor sourcing food ingredients from Chile, Mexico, and Colombia due to favorable exchange rates.

FAS Quito sees good opportunities for food ingredients, especially for seasonings used in the manufacturing of pre-cooked and easy-to-prepare meals. Food processors are increasingly diversifying their product offerings in these product segments.

### Food Retail Industry

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).

National statistics report that 48 percent of Ecuadorians purchase their grocery items at local grocery stores. Monthly food expenditures average \$261. Supermarket sales are trending upwards in part due to the stores' more organized format and greater imported product availability. Most supermarket chains have stores in large and medium size cities. In many small cities they operate under different names.

### Quick Facts CY 2022

#### Top Imported Products in Ecuador

1. Food Industry Residues; Prep Animal Feed
2. Cereals
3. Fats and oils
4. Beverages and Spirits
5. Edible Fruits & Nuts
6. Prepared Cereal products

#### Key Trade and Demographic Information

Agricultural Imports from All Countries (\$) / U.S. Market Share (%)	\$4.5 billion/ 18%
Consumer Food Imports from All Countries (\$Mil) / U.S. Market Share (%)	\$1 billion/ 8%
Total Population (Millions) / Annual Growth Rate (%)	18.1 million/ 1%
Population of Major Metropolitan Areas (millions)	Quito (capital) - 2.8 Guayaquil - 2.7
Per Capita Gross Domestic Product (U.S. Dollars)	\$13,375 PPP
Per Capita Food Expenditures (U.S. Dollars)	\$950.5
Percentage of household spending on Food	33.2%
Exchange Rate (US\$1 = US\$1)	\$1.00

#### Strengths/Weakness

Strengths	Weakness
Appreciation for U.S. food quality and culture.	Price of U.S. products can tend to be higher due to tariffs.
Opportunities	Challenges
Consumers are increasing fast food consumption and grocery store purchases.	Competition from European products is increasing due to Trade Agreements.

Data and information sources: FAS Quito  
Contact: FAS Quito

## SECTION I. DETAILED MARKET OVERVIEW

Ecuador's real gross domestic product (GDP) is forecast to increase 1.2 percent in 2023 to \$119.9 billion, after suffering a contraction of 7.8 percent in 2020. Economic growth is expected to continue for the next several years, averaging two percent per year. Ecuador remains a dollarized economy.

The country continues to offer U.S. food and agricultural product exporters a number of possibilities. Many U.S. agricultural and value-added products are price competitive and, in many cases, when U.S. product prices are higher, consumers still prefer them due to quality. There is also a growing demand for specialty products and functional foods that local producers are not able to supply, creating a niche market for these types of imports.

Ecuador's population of 18.1 million inhabitants, with a median age of 28.8 years, continues to grow at almost 1 percent per year. These younger and lower to middle-income consumers' purchasing power and appetite for imports remains strong despite the economic slowdown in recent years. Unemployment is hovering around 3.6 percent and is forecast to remain at this level through 2024. Ecuador's underemployment rate is around 65.2 percent. This underemployment in the national workforce of 8.4 million limits further consumption. The government is seeking to increase the level of employment by implementing new measures and laws that would provide more employment flexibility. 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 imports of food and other essential goods. FAS Quito forecasts that this demand will continue expanding slowly, making Ecuador vulnerable to external price fluctuations.

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

	2020	2021	2022 Estimate	2023 Forecast	2024 Forecast
<b>Nominal GDP (\$ billions)</b>	99.3	106.2	115.0	119.7	123.5
<b>Real GDP Growth (%)</b>	-7.8	4.2	2.9	1.2	0.7
<b>Consumer Price Inflation (%)</b>	-0.9	1.9	3.7	1.8	1.6
<b>Private Consumption (% real change)</b>	-8.2	10.2	4.6	1.9	1.3
<b>Public Sector Consumption (% real change)</b>	-5.1	-1.7	4.5	1.8	2.0

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

### General and Agricultural Export-Import Trade Situation

U.S. – Ecuador bilateral agricultural and related trade in 2022 totaled \$4.3 billion. Ecuador maintains an agricultural trade surplus of \$2.8 billion with the United States. U.S. exports of food and agricultural products to Ecuador in 2022 totaled a record \$740.2 million, up \$165.5 million or 28 percent compared to 2021. From January to September 2023, U.S. exports of food and agricultural products to Ecuador increased 1.3 percent compared to the same period in 2022. This growth is driven by Ecuadorian demand for U.S. intermediate products (such as soybean meal and distiller's grains). Imports of U.S. bulk and consumer-oriented products in 2023 (January to September) are down 44 and 5 percent, respectively.

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

<b>ADVANTAGES</b>	<b>CHALLENGES</b>
Appreciation for U.S. food quality and culture.	Restrictive import measures.
Dollarization has brought a measure of economic stability for importers and improved consumer purchasing power.	Ecuador is a relatively small market, a constraining factor for U.S. exporters seeking large volume contracts.
Local food processing industry is not always able to offer competitive market prices.	Loss in market share due to more favorable regional exchange rates and trade agreements.
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.	Ecuador’s free trade agreement with the European Union (EU) enables consumer-oriented food products from EU member countries to enter with reduced import tariffs.
Consumers are increasing fast food consumption and grocery store purchases.	Sluggish economy may reduce consumption of higher-priced imported food/beverage products.
Recognition of U.S. brands in the market.	Food product smuggling.

**SECTION II. EXPORTER BUSINESS TIPS**

Supermarket chains are the main channel for imported food products. They target mainly middle to high-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 (TIA), Mega Santa Maria, and Supermercados Coral are growing chains of medium-sized supermarkets. With dual income households on the rise and commute times and distances getting longer, consumers are increasingly turning to fast food 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.

Importers require that the exporter obtains all necessary export permits and licenses and arranges 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 import authorization from the Ministry of Agriculture, the Ministry of Production, Foreign Trade, Investments, and Fisheries, and/or the Ministry of Public Health. Importers purchase based on price and quality. There are niche markets for high value products for high-income consumers, for whom pricing is not necessarily a concern. The use of point-of-purchase (POP) material is recommended, as well as promotional campaigns and samplings.

**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 on the channel chosen, identify a strategic partner that will import the product.
- Register processing plants, when required.
- Obtain the sanitary notification or certification, depending on direct sales or via 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.

### **SECTION III. IMPORT FOOD STANDARDS & REGULATIONS/ IMPORT PROCEDURES**

This section provides a brief overview of Ecuador’s import procedures and requirements. For more detailed information please refer to FAS Quito’s 2023 [FAIRS Country](#) and [FAIRS Certificate](#) reports.

#### **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 equivalent to the Food and Drug Administration (FDA) and oversees sanitary supervision and registration of processed food and beverages. AGROCALIDAD (national sanitary authority) is part of the Ministry of Agriculture. Like specialized agencies within the 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 and control.

#### **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 and a Customs Control Service Fee.

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. The sanitary notification for imported products is granted by confirmation (or equivalence) by product or line of production. 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 by product is valid for five years from the date of issue or in the case of line of production, while the equivalent certification of the good manufacturing practices is valid. In the case of food supplements or products that claim a specific nutritional characteristic, there are additional import requirements. For further information refer to the FAS Quito [FAIRS Country](#) and [FAIRS Certificate](#) reports.

#### **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, plant, or their derived products, Ecuador only accepts health certificates issued by USDA agencies. For animal and plant products and by-products the certificate must come from the Animal and Plant Health Inspection Service (APHIS). For meat and meat products the Food Safety and Inspection Service (FSIS) should issue the certificate. A certificate issued by the Agricultural Marketing Service (AMS) must accompany dairy products. For feed and pet food, an FDA export certificate is also accepted.

### **Labeling Requirements**

Imported packaged foods must have a separate adhesive label in Spanish before reaching the point of sale. 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 have a visible traffic light label for sugar, fat, and salt on each individual package.

### **Registration of Plants and Farms**

To import livestock, animal by products, or products for animal consumption, AGROCALIDAD requires the registration of the farm or plant from where the products originate. This is an importer lead process that requires information from the exporter and farm or plant of production. For further information about registration of plants and farms please refer to FAS Quito [FAIRS Country](#) report.

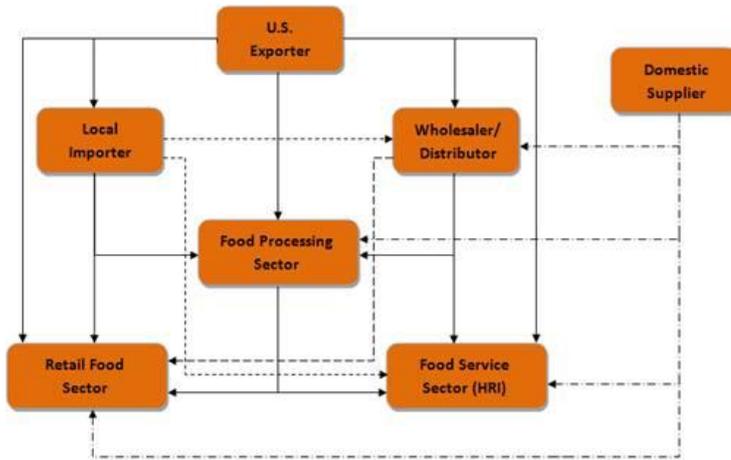
## **SECTION IV. MARKET SECTOR STRUCTURE AND TRENDS**

### **Market Structure**

- Supermarket chains are the main means for reaching middle to high-income consumers.
- Exporters should directly contact importers, wholesalers/distributors, or supermarkets.
- U.S. exporters can approach gas, grocery, and convenience stores through major local distributors.
- Be diligent when selecting an agent or representative. Personal visits/meetings and background checks of the prospective partner are highly recommended before signing 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.

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. 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.

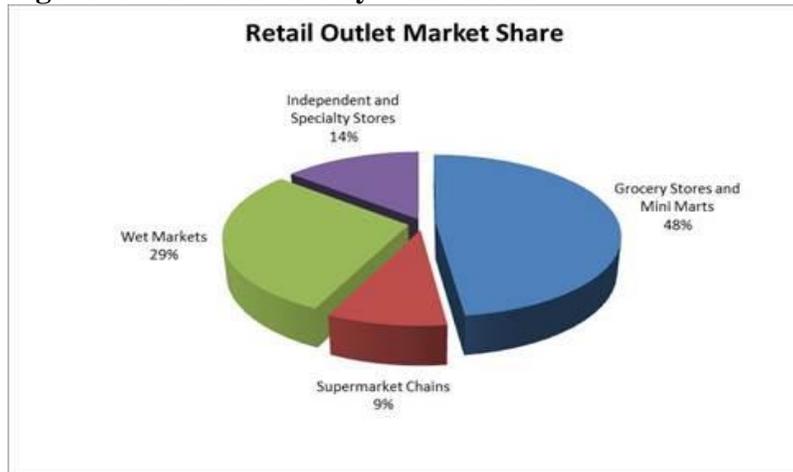
**Figure 1: Import Distribution Channels**



**Retail Food Sector**

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 lower prices from suppliers in order to obtain higher sales margins. Alternatively, retailers can be enticed with offers of promotional cost sharing.

**Figure 2: Market Share by Retail Sector**



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

Forty-eight percent of Ecuadorians are reported to purchase their food at local grocery stores. Monthly food expenditures average \$250. Most middle to high-income consumers (36 percent of Ecuadorians) purchase food products in modern supermarkets. Supermarket store sales are trending upwards due to the stores’ cleaner, more organized format and greater imported product availability. Most chains have stores in large/medium-size cities and operate under different names in small towns. Around 400 U.S. food items are offered by local supermarket chains. While supermarkets on average allocate 18 percent of store shelf space to imports, mini marts specialize in supplying items such as liquors, snacks, and soft drinks. Store sales spike during the holidays, especially at Christmas, Valentine’s Day, Carnival, Mother’s Day, and Father’s Day. Demand for consumer-ready products also peaks during the tourist season (June-September).

**Table 3: Ecuador: Retail Sales and Consumer Expenditures (\$ billions) 2019-2023**

	2019	2020	2021 (estimate)	2022 (estimate)	2023 (forecast)	2024 (forecast)
Retail Food Sales (\$ billion)	\$24.4	\$23.1	\$24.9	\$25.9	\$26.5	\$27.3
Food, Beverage, and Tobacco (consumer expenditure; \$ billion)	\$14.9	\$13.6	\$15.1	\$16.4	\$17.3	\$17.6

Source: Economist Intelligence Unit.

Food sales accounted for an estimated 61 percent of Ecuador’s total retail sales in 2022. This is high when compared with developed countries, where the ratio is usually below 50 percent.

### **Food Processing Sector**

Ecuadorian food processors tend to favor sourcing food ingredients from Chile, Mexico, and 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.

FAS Quito continues to see good opportunities for food ingredients, particularly for seasonings used in the manufacture of pre-cooked and easy-to-prepare meals. Food processors are increasingly diversifying their product offerings in these product segments. For example, one fish processor is now manufacturing ready to eat 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**

The HRI sector continues to recover and consumer spending in restaurants is expected to stay stable for the next several years. HRI expenses averaged eight percent of household food expenditures in recent years. Most restaurants will continue to be supplied by a combination of local producers and importers. Large, international chains will continue to import directly through their agents.

Tourism usually drives HRI growth. International tourist numbers in 2022 reached 1.2 million visitors, a significant increase compared to 2021 when Ecuador received less than 600,000 visitors. The sector continues to show positive signs and industry experts expect it to grow into 2024. Local tourism in rural areas is a new trend driving new HRI developments outside main cities. Products with the greatest demand include meat, shellfish, salmon, mussels, squid, wine, beer, liquor, olive oil, truffles, canned tomatoes, confectionaries, sausages, pre-cooked frozen potatoes, cheese products, and spices.

Domestic demand for fast food is also growing, especially chains with delivery options. Many major U.S. food chains are represented in Ecuador, concentrated in the large urban centers. U.S. franchises in Ecuador include KFC, Pizza Hut, Burger King, McDonald’s, Wendy’s, Carl’s Jr, Dunkin Donuts, Domino’s Pizza, Papa Johns, Baskin Robbins, Subway, Taco Bell, TGI Fridays, Tony Roma’s, Chili’s, Red Lobster, IHOP, American Deli, Crepes & Waffles, Tropi Burger, Pollo Tropical, and Little Caesars.

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

## SECTION V: AGRICULTURAL AND FOOD IMPORTS

The tables below reflect import categories by importance based on value, market share of consumer-oriented imports by country, and what FAS Quito considers the best consumer-oriented product prospects based on conversations with local importers. See Addendum A for more import categories.

**Table 4: Agricultural and Related Product Imports (\$ million) with Significant U.S. Market Share**

HS Code	Description	Ecuador Imports from World			Ecuador Imports from United States			U.S. Share 2022
		2020	2021	2022	2020	2021	2022	
05	Products of animal origin, nesoi	\$ 30	\$ 27	\$ 33	\$ 11	\$ 9	\$ 11	33%
16	Edible preparations of meat, fish, crustaceans, mollusks or other aquatic invertebrates	\$ 8	\$ 12	\$ 14	\$ 2	\$ 3	\$ 4	31%
23	Residues and waste from the food industries; prepared animal feed	\$ 793	\$ 1,154	\$ 1,637	\$ 309	\$ 373	\$ 500	31%
02	Meat and edible meat offal	\$ 10	\$ 17	\$ 17	\$ 3	\$ 5	\$ 4	24%
10	Cereals	\$ 384	\$ 578	\$ 762	\$ 120	\$ 124	\$ 142	19%
12	Oil seeds and oleaginous fruits; miscellaneous grains, seeds and fruits; industrial or medicinal plants; straw and fodder	\$ 39	\$ 46	\$ 51	\$ 10	\$ 11	\$ 9	18%
18	Cocoa and cocoa preparations	\$ 37	\$ 48	\$ 55	\$ 7	\$ 8	\$ 7	13%
21	Miscellaneous edible preparations	\$ 268	\$ 303	\$ 298	\$ 34	\$ 39	\$ 36	12%

Last full calendar year data 2022 (January-December). NESOI = Not Elsewhere Specified or Indicated.

Source: Ecuadorian Central Bank via Trade Data Monitor (HS 2-digit).

**Table 5: Ecuador, Top 10 Suppliers, Consumer Foods (\$ millions) Partner Country**

Partner Country	2020	2021	2022	% Share 2022	% Change 2021/2022
Chile	\$ 205.17	\$ 240.12	\$ 237.24	24.66%	-1.20%
Colombia	\$ 124.02	\$ 136.93	\$ 164.49	14.91%	20.13%
Peru	\$ 74.97	\$ 72.93	\$ 93.62	9.01%	28.38%
<b>United States</b>	<b>\$ 76.55</b>	<b>\$ 83.62</b>	<b>\$ 86.27</b>	<b>9.20%</b>	<b>3.16%</b>
Mexico	\$ 54.65	\$ 53.00	\$ 63.02	6.57%	18.90%
Spain	\$ 33.41	\$ 45.06	\$ 49.47	4.02%	9.78%
Argentina	\$ 23.02	\$ 34.92	\$ 40.91	2.77%	17.14%
Brazil	\$ 24.00	\$ 27.62	\$ 38.23	2.89%	38.43%
United Kingdom	\$ 22.69	\$ 24.45	\$ 34.71	2.73%	41.97%
Netherlands	\$ 25.72	\$ 30.23	\$ 34.54	3.09%	14.23%
<b>Total Top 10</b>	<b>\$ 664.20</b>	<b>\$ 748.88</b>	<b>\$ 842.49</b>	<b>79.84%</b>	<b>12.50%</b>

Latest full calendar year data 2022 (January-December).

Source: Ecuadorian Central Bank via Trade Data Monitor (Consumer-Oriented Agricultural Total).

## BEST HIGH-VALUE PRODUCT PROSPECTS

**Table 6: Best Consumer-Oriented Product Prospects**

Product Category	2021 Market Size Import Volume	2021 Import Sales	5-Yr. Avg. Annual Import Growth Volume	Import Tariff Rate	Key Constraints Over Market Development	Market Attractiveness for USA
<b>Fresh Fruits</b>	103,600 MT	\$ 118.7 million	0.6%	Apples = 15% Pears = 15% Grapes = 15% Others = 25%	Chile benefits from lower tariffs and shipping proximity.	Rising demand for fresh fruits. U.S. export window is during Chile's off-season.
<b>Processed Fruits and Nuts</b>	25,996 MT	\$ 67.6 million	3%	15-25%	Chile benefits from long established relationships with local importers.	Demand is growing. Importers are interested in different nut types.
<b>Chocolate</b>	10,701 MT	\$ 54.6 million	7.4%	30%	Local production, especially of dark chocolate is up.	Un-met demand for product diversity. U.S. brands are well known.
<b>Sugar Confectionery Products</b>	17,849 MT	\$53.6 million	7.1%	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>	53,053 MT	\$ 90.9 million	17.9%	20-30%	Competitors include Andean Community and EU countries; benefit from FTAs	Demand for specialized products that do not exist in the region.
<b>Teas and Infusions</b>	192 MT	\$ 2.9 million	6.9%	0-30%	Strong local and EU competition.	The United States is a traditional supplier.
<b>Processed Vegetables (mainly frozen)</b>	38,024 MT	\$ 47.5 million	8.4%	25%	Lack of cold chain. Quality misperceptions.	Shipping proximity. Nascent demand.
<b>Condiments and Sauces</b>	6,729 MT	\$ 21.6 million	10.9%	30%	Local competition at lower price	Quality and diversity of U.S. products
<b>Precooked, ready-to-eat frozen meals</b>	N/A	N/A	Immature Market	No specific HS 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>	30.3 Million liters	\$ 34.7 million	27.8% per annum	Varies by alcohol content	Local production. EU benefits from trade agreement.	Strong importer interest for alternative, non-pilsner beer styles.
<b>Spirits and</b>	10.8 million	\$48.2	20.4%	Varies by	UK brands are well	Strong demand for

<b>Liqueurs</b>	liters	million	per annum	alcohol content	established. EU benefits from trade agreement.	spirits. Shipping proximity. Interest in importing as bulk to be bottled locally
<b>Wine</b>	15.3 million liters	\$39.1 million	15.5% per annum	Varies by alcohol content	Chile and Argentina dominate the market. EU benefits from FTA and is growing.	Strong interest of retail stores to increase diversity of origin.
<b>Dog and Cat Food</b>	13,175 MT	\$23.4 million	16.8% per annum	45%	Local competition by large feed corporations	Demand for Specialized and high-end products not produced locally

Latest full calendar year data 2022 (January-December).

Source: Ecuadorian Central Bank via Trade Data Monitor, FAS Quito office research.

## SECTION VI.: 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 FAS Quito's [Food and Agricultural Import Regulations and Standards Country \(FAIRS\)](#), [FAIRS Export Certificate](#), and [Food Processing Ingredients Sector](#) GAIN reports.

**Central Bank of Ecuador (Banco Central del Ecuador):** [www.bce.fin.ec](http://www.bce.fin.ec)

**Instituto Nacional de Estadísticas y Censo:** [www.ecuadorencifras.gob.ec](http://www.ecuadorencifras.gob.ec)

**Ministerio de Agricultura y Ganadería:** <https://www.agricultura.gob.ec/>

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

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

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

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

**Attachments:** [ADDENDUM A - 2023-review.docx](#)