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**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. If the U.S. - Ecuador Agreement on Reciprocal Trade gets ratified new opportunities would arise for U.S. products.

Market Fact Sheet: ECUADOR

Executive Summary

Exports of U.S. agricultural products to Ecuador have increase in the first quarter of 2026 and 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 2025 totaled \$5.6 billion. Ecuador maintains a total agricultural trade surplus of \$4.3 billion. U.S. exports of food and agricultural products to Ecuador in 2025 totaled \$626.3 million, up \$81.7 million or 15 percent compared to 2024. The increase was primarily driven by increased demand in Ecuador for U.S. bulk products, such as wheat and intermediate products such as feeds & fodders and distillers dried grains with solubles (DDGS).

Food Processing Industry

Ecuadorian food processors tend to favor sourcing commodities from Argentina and Canada, as well as food ingredients from Chile, Mexico, and Colombia due to favorable prices and 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 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 indicate that 48 percent of Ecuadorians obtain their grocery items at local grocery stores. The monthly minimum food expenditure per household in Ecuador is reported to be \$262. Supermarket sales are on the rise, driven in part by the stores’ more organized layout and the wider availability of imported products. Most supermarket chains maintain stores in large and medium-sized cities while in many smaller cities, they operate under different brand names.

Quick Facts CY 2022

| Top Imported Products in Ecuador            |
|---------------------------------------------|
| 1. Food Industry Residues; Prep Animal Feed |
| 2. Cereals                                  |
| 3. Miscellaneous edible preparations        |
| 4. Fats and oils                            |
| 5. Edible Fruits & Nuts                     |
| 6. Sugar and sugar confectionary            |
| 7. Beverages and Spirits                    |

| Key Trade and Demographic Information                                    |                                |
|--------------------------------------------------------------------------|--------------------------------|
| Agricultural Imports from All Countries (\$) / U.S. Market Share (%)     | \$4.1 billion/ 15.5%           |
| Consumer Food Imports from All Countries (\$Mil) / U.S. Market Share (%) | \$1.2 billion/ 7.3%            |
| Total Population (Millions) / Annual Growth Rate (%)                     | 18.4 million/ 0.8%             |
| Population of Major Metropolitan Areas (millions)                        | Quito - 2.8<br>Guayaquil - 2.9 |
| Per Capita Gross Domestic Product (U.S. Dollars)                         | \$16,340 PPP                   |
| Per Capita Food Expenditures (U.S. Dollars)                              | \$1,460                        |
| Percentage of household spending on Food                                 | 22%                            |
| 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 2.5 percent in 2026 to \$138.2 billion. This is lower than the 3.7 percent growth in 2025. 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 in the Ecuadorian market. Even in cases where U.S. product prices are higher, consumers often continue to choose them because of their superior quality and trusted reputation. There is also an increasing demand for specialty products and functional foods that local producers are often unable to supply, creating a niche market for these types of imports.

Ecuador's population of 18.4 million inhabitants, with a median age of 29.7 years, continues to grow at almost 1 percent per year. These younger and lower-to-middle-income consumers have robust purchasing power and a strong appetite for imported goods, demonstrating remarkable resilience despite the economic slowdown experienced in recent years. Unemployment is hovering around 3.1 percent and is forecast to remain at this level through 2026. Ecuador's underemployment rate stands at approximately 71 percent within its national workforce of 8.9 million, significantly constraining overall consumption capacity. To address this challenge, the government is evaluating implementing new measures and legislation aimed at increasing employment levels by providing greater employment flexibility and creating more job opportunities. Household consumption will remain moderate in the short to medium-term. Local production is not keeping up with domestic demand, necessitating continued imports. Despite implementing measures to restrict import growth in order to control dollar outflows, Ecuador continues to rely heavily on imports for food and other essential goods, highlighting the country's structural dependence on foreign products to meet basic consumer needs. 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)**

|                                                  | <b>2023</b> | <b>2024<br/>Estimate</b> | <b>2025<br/>Forecast</b> | <b>2026<br/>Forecast</b> | <b>2027<br/>Forecast</b> |
|--------------------------------------------------|-------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <b>Nominal GDP (\$ billions)</b>                 | 121.1       | 124.6                    | 125.7                    | 129.0                    | 134.7                    |
| <b>Real GDP Growth (%)</b>                       | 1.99        | -2.0                     | 1.4                      | 1.9                      | 2.0                      |
| <b>Consumer Price Inflation (%)</b>              | 2.2         | 1.7                      | 1.4                      | 1.8                      | 1.5                      |
| <b>Private Consumption (% real change)</b>       | 4.2         | -1.3                     | 1.5                      | 2.2                      | 2.5                      |
| <b>Public Sector Consumption (% real change)</b> | 1.7         | -1.2                     | 2                        | 1.4                      | 1.4                      |

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

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

Bilateral agricultural and related product (including biodiesel, forest, and seafood products) trade between the United States and Ecuador rose to \$5.6 billion in 2025, with increase in sales for Ecuador

and for the United States. The agricultural and related product trade balance remained significantly beneficial for Ecuador, at \$4.3 billion. This is primarily driven by an Ecuadorian shrimp and cacao related product exports, which represent 39 percent and 23 percent of agricultural and related products imported by the United States from Ecuador (\$4.9 billion). The trade deficit of just agricultural products increased 41 percent to \$2302.2 million, representing almost five-to-one trade ratio in favor of Ecuador.

Exports of U.S. agricultural and related products to Ecuador in 2025 totaled a record \$626.3 million, up \$81.7 million or 15 percent compared to 2024. This increase was driven primarily by Ecuadorian demand for wheat, feed, meals & fodders and a couple of consumer-oriented categories. Total imports of bulk products increased 43.7 percent by value, which was principally the result of an increase in imports of wheat. Imports of U.S. intermediate products increased 3.5 percent thanks to an increase export of feed, meals & fodders and distillers dried grains with solubles (DDGs). Imports of consumer-oriented products increased by 11.4 percent compared to 2024 with some categories reaching record numbers.

From January to April 2026, U.S. exports of food and agricultural products to Ecuador have increased 45.4 percent compared to the same period in 2025. This increase is driven mainly by exports of wheat, soybean meal, feed and fodders, and DDGs. Consumer-oriented products in 2025 (January to April) are down 4.1 percent despite increase in categories like distilled spirits, dairy products, condiments and sauces, and food preparations.

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

| ADVANTAGES                                                                                                                                                                     | CHALLENGES                                                                                                                                                         |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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, MEGAMAXI

and AKI) and El Rosado (MI COMISARIATO and TUTI). Hypermercados Coral, Tiendas Industriales Asociadas (TIA), and Mega Santa Maria 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 expect exporters to obtain all necessary export permits and licenses and to handle logistics up to the U.S. shipping port. In Ecuador, imports can be managed either by individuals or companies. All imports require an import permit known as the DAI (Customs Import Declaration). This documentation is essential for the legal entry of goods into the country. Certain imports into Ecuador require specific authorization from the Ministry of Agriculture, the Ministry of Production, Foreign Trade, Investments, and Fisheries, and/or the Ministry of Public Health. Importers typically make purchasing decisions based on price and quality. There are also niche markets for high-value products targeting high-income consumers, where pricing is less of a concern. It is recommended to use point-of-purchase (POP) materials, along with promotional campaigns and product samplings, to effectively attract consumers and boost product visibility in the market.

### **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 [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, a Food and Drug Association (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](#).

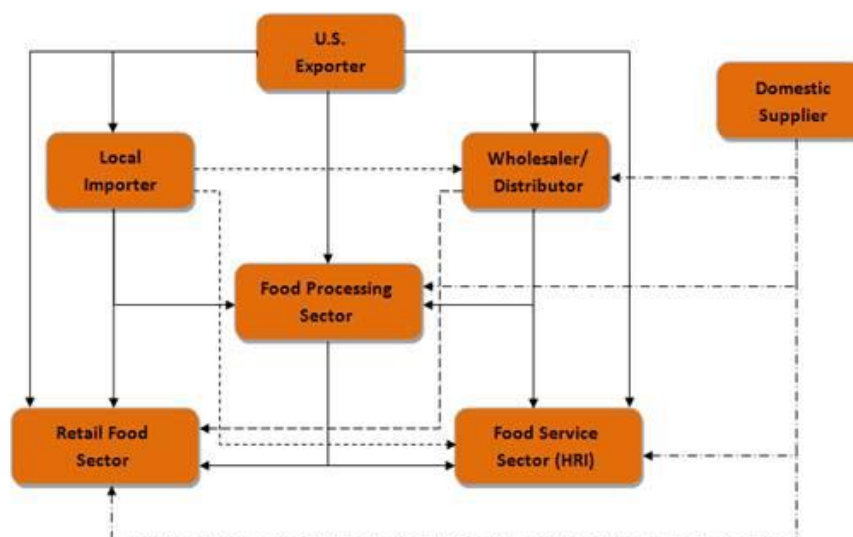
## SECTION IV. MARKET SECTOR STRUCTURE AND TRENDS

### 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.

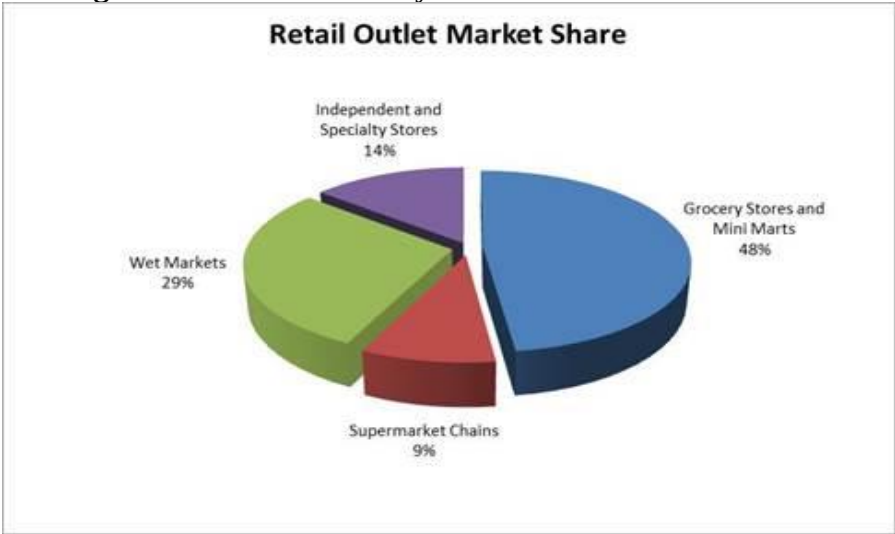
**Figure 1: Import Distribution Channels**



### 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)

Nearly half of Ecuadorians (48 percent) report purchasing their food at local grocery stores while monthly food expenditures average \$261. Most middle to high-income consumers (36 percent of Ecuadorians) purchase food products at modern supermarkets. Supermarket sales continue to rise, driven by cleaner and more organized formats and a wider selection of imported products. . Major supermarket chains primarily operate in large and medium-sized cities, and often use different store names in smaller towns to reach local consumers. Local supermarket chains in Ecuador offer approximately 400 U.S. food items, highlighting the strong presence of American products in the market. On average, supermarkets allocate 18 percent of their shelf space to imports goods. In comparison, mini marts focus on supplying products like 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 sees a noticeable increase during the tourist season, which runs from June to September. Additionally, the use of online apps like Tipti and Super Easy for purchasing products at retail stores has become increasingly popular, particularly among younger consumers.

**Table 3: Ecuador: Retail Sales and Consumer Expenditures (\$ billions) 2023-2027**

|                                                                   | 2023<br>(actual) | 2024<br>(estimate) | 2025<br>(forecast) | 2026<br>(forecast) | 2027<br>(forecast) |
|-------------------------------------------------------------------|------------------|--------------------|--------------------|--------------------|--------------------|
| Retail Food Sales (\$ billion)                                    | \$25.8           | \$26.0             | \$26.6             | \$27.3             | \$28.1             |
| Food, Beverage, and Tobacco<br>(consumer expenditure; \$ billion) | \$17.8           | \$18.7             | \$19.1             | \$19.6             | \$20.0             |

Source: Economist Intelligence Unit.

Food sales accounted for an estimated 59.2 percent of Ecuador's total retail sales in 2025. 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 identify promising opportunities for food ingredients in Ecuador, especially seasonings used in the production of pre-cooked and easy-to-prepare meals. Food processors are responding to evolving market preferences by diversifying their product lines within these segments. For instance, a local fish processor has expanded into 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 its recovery, with consumer spending in restaurants projected to remain stable over the next several years. On average, HRI expenses have accounted for about nine percent of household food expenditures in recent years. Most restaurants are expected to maintain their supply chains by sourcing from a mix of local producers and importers. Large, international chains typically continue to import directly through their agents, ensuring consistent access to global products and ingredients.

Tourism is a key driver of growth in Ecuador's HRI sector. In 2025, international tourist arrivals reached 1.3 million visitors (an increase of 8.8 percent compared to 2024). Industry experts remain optimistic and predict an increase in visitors in 2026. A notable new trend is the rise of local tourism in rural areas, which is fueling the development of new HRI establishments outside traditional urban centers. Among the products experiencing the highest demand in the sector are 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 on the rise, particularly for chains that offer delivery options. Food delivery apps like Pedidos Ya, Rappi and Uber Eats have significantly expanded their reach and business in recent years, catering to growing consumer preferences for convenience and quick service. Many major U.S. food chains are well represented in Ecuador, primarily 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 2025 (percentage) |
|---------|---------------------------------------------------------------------------------------------------------------------------|----------------------------|----------|----------|------------------------------------|--------|--------|------------------------------|
|         |                                                                                                                           | 2023                       | 2024     | 2025     | 2023                               | 2024   | 2025   |                              |
| 10      | Cereals                                                                                                                   | \$ 664                     | \$ 596   | \$ 723   | \$ 116                             | \$ 118 | \$ 169 | 23.4%                        |
| 23      | Residues and waste from the food industries; prepared animal feed                                                         | \$ 1,614                   | \$ 1,367 | \$ 1,440 | \$ 584                             | \$ 353 | \$ 335 | 23.3%                        |
| 16      | Edible preparations of meat, fish, crustaceans, molluscs or other aquatic invertebrates                                   | \$ 16                      | \$ 16    | \$ 17    | \$ 5                               | \$ 4   | \$ 4   | 22.9%                        |
| 05      | Products of animal origin, nesoi                                                                                          | \$ 27                      | \$ 34    | \$ 47    | \$ 7                               | \$ 7   | \$ 10  | 21.8%                        |
| 12      | Oil seeds and oleaginous fruits; miscellaneous grains, seeds and fruits; industrial or medicinal plants; straw and fodder | \$ 55                      | \$ 63    | \$ 67    | \$ 11                              | \$ 11  | \$ 11  | 16.7%                        |
| 13      | Lac; gums; resins and other vegetable saps and extracts                                                                   | \$ 17                      | \$ 13    | \$ 16    | \$ 2                               | \$ 1   | \$ 2   | 15.5%                        |
| 21      | Miscellaneous edible preparations                                                                                         | \$ 314                     | \$ 308   | \$ 349   | \$ 35                              | \$ 37  | \$ 42  | 11.9%                        |
| 18      | Cocoa and cocoa preparations                                                                                              | \$ 56                      | \$ 57    | \$ 66    | \$ 6                               | \$ 6   | \$ 7   | 10.5%                        |
| 02      | Meat and edible meat offal                                                                                                | \$ 20                      | \$ 21    | \$ 27    | \$ 3                               | \$ 4   | \$ 3   | 10.0%                        |
| 01      | Live animals                                                                                                              | \$ 29                      | \$ 32    | \$ 36    | \$ 3                               | \$ 3   | \$ 3   | 9.0%                         |

Last full calendar year data 2025 (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     | 2023             | 2024             | 2025             | Percentage Share 2025 | Percentage Change 2024/2025 |
|---------------------|------------------|------------------|------------------|-----------------------|-----------------------------|
| Chile               | \$ 224.33        | \$ 230.62        | \$ 237.81        | 19.76%                | 3.12%                       |
| Colombia            | \$ 184.71        | \$ 185.62        | \$ 189.90        | 15.78%                | 2.30%                       |
| Peru                | \$ 104.55        | \$ 97.52         | \$ 108.25        | 9.00%                 | 11.00%                      |
| United States       | \$ 81.74         | \$ 79.44         | \$ 88.07         | 7.32%                 | 10.87%                      |
| Spain               | \$ 52.21         | \$ 52.30         | \$ 60.15         | 5.00%                 | 15.01%                      |
| China               | \$ 29.00         | \$ 41.85         | \$ 55.35         | 4.60%                 | 32.25%                      |
| Brazil              | \$ 37.97         | \$ 44.97         | \$ 53.97         | 4.49%                 | 20.02%                      |
| Mexico              | \$ 56.85         | \$ 56.77         | \$ 50.05         | 4.16%                 | -11.83%                     |
| Netherlands         | \$ 44.20         | \$ 40.52         | \$ 48.12         | 4.00%                 | 18.76%                      |
| Italy               | \$ 40.82         | \$ 37.16         | \$ 46.02         | 3.82%                 | 23.82%                      |
| <b>Total Top 10</b> | <b>\$ 856.38</b> | <b>\$ 866.77</b> | <b>\$ 937.69</b> | <b>77.92%</b>         | <b>8.18%</b>                |

Latest full calendar year data 2025 (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          | 2024 Market Size Import Volume | 2024 Import Sales (million) | 5-Yr. Avg. Annual Import Growth Volume (Percentage) | Import Tariff Rate (Percentage)                         | Key Constraints Over Market Development                                  | Market Attractiveness for USA                                                    |
|---------------------------|--------------------------------|-----------------------------|-----------------------------------------------------|---------------------------------------------------------|--------------------------------------------------------------------------|----------------------------------------------------------------------------------|
| Fresh Fruits              | 94,320 MT                      | \$ 121.6                    | -4.1                                                | Apples = 15<br>Pears = 15<br>Grapes = 15<br>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. |
| Processed Fruits and Nuts | 29,256 MT                      | \$ 69.7                     | 1.7                                                 | 15-25                                                   | Chile benefits from long established relationships with local importers. | Demand is growing. Importers are interested in different nut types.              |

|                                             |                     |         |                 |                                                           |                                                                          |                                                                                                    |
|---------------------------------------------|---------------------|---------|-----------------|-----------------------------------------------------------|--------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|
| <b>Chocolate</b>                            | 10,055 MT           | \$ 63.4 | 0.4             | 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>         | 19,835 MT           | \$63.7  | 11.6            | 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>  | 35,759 MT           | \$ 97.8 | 6.2             | 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>                   | 233 MT              | \$ 3.1  | 2.0             | 0-30                                                      | Strong local and EU competition.                                         | The United States is a traditional supplier.                                                       |
| <b>Processed Vegetables (mainly frozen)</b> | 37,513 MT           | \$ 53.9 | 0.5             | 25                                                        | Lack of cold chain. Quality misperceptions.                              | Shipping proximity. Nascent demand.                                                                |
| <b>Condiments and Sauces</b>                | 6,689 MT            | \$ 23.4 | 2.9             | 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 percent 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>                      | 24.5 Million liters | \$ 33.6 | 0.3             | Varies by alcohol content                                 | Local production. EU benefits from trade agreement.                      | Strong importer interest for alternative, non-pilsner beer styles.                                 |
| <b>Spirits and Liqueurs</b>                 | 7.3 million liters  | \$ 38.2 | 4.7             | Varies by alcohol content                                 | UK brands are well established. EU benefits from trade agreement.        | Strong demand for spirits. Shipping proximity. Interest in importing as bulk to be bottled locally |

|                         |                     |         |     |                           |                                                                               |                                                                   |
|-------------------------|---------------------|---------|-----|---------------------------|-------------------------------------------------------------------------------|-------------------------------------------------------------------|
| <b>Wine</b>             | 14.4 million liters | \$ 35.0 | 2.1 | 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> | 12,777 MT           | \$29.0  | 8.3 | 45                        | Local competition by large feed corporations                                  | Demand for Specialized and high-end products not produced locally |

Latest full calendar year data 2025 (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 - 2026.docx](#)