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Report Highlights:

Wheat production in marketing year (MY) 2026/27 (July-June) is projected at 9,000 metric tons (MT), a slight decline from the previous year. With only about 5,000 hectares (HA) dedicated to cultivation, Ecuador's wheat production remains insufficient to meet domestic demand, resulting in complete reliance on imports. Corn production in MY 2026/27 (May-April) is expected to reach 1.80 million metric tons (MMT), a 28 percent increase from the MY 2025/26 estimate due to expanded harvested area and improved yields. Rice production in MY 2026/27 is forecasted at 1.5 million metric tons (MMT), with planted area holding steady at 280,000 hectares, the same as in MY 2025/26.

Chart 1. Wheat Production, Supply, and Distribution

Wheat Market Year Begins Ecuador	2024/2025		2025/2026		2026/2027	
	Jul 2024		Jul 2025		Jul 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	5	7	5	5	0	5
Beginning Stocks (1000 MT)	247	247	370	223	0	246
Production (1000 MT)	8	14	10	10	0	9
MY Imports (1000 MT)	2094	1669	2300	1800	0	1800
TY Imports (1000 MT)	2094	1669	2300	1800	0	1800
Total Supply (1000 MT)	2349	1930	2680	2033	0	2055
MY Exports (1000 MT)	4	0	5	0	0	0
TY Exports (1000 MT)	4	0	5	0	0	0
Feed and Residual (1000 MT)	1200	933	1450	1000	0	1134
FSI Consumption (1000 MT)	775	774	800	787	0	810
Total Consumption (1000 MT)	1975	1707	2250	1787	0	1944
Ending Stocks (1000 MT)	370	223	425	246	0	111
Total Distribution (1000 MT)	2349	1930	2680	2033	0	2055
Yield (MT/HA)	1.6	2	2	2	0	1.8

(1000 HA),(1000 MT),(MT/HA)
 MY = Marketing Year, begins with the month listed at the top of each column
 TY = Trade Year, which for Wheat begins in July for all countries. TY 2026/2027 = July 2026 - June 2027

The Government of Ecuador (GOE) continues to support small farmers by distributing local seed varieties and providing technical assistance and marketing support, in coordination with the milling industry. Since 2010, the Ecuadorian milling industry has actively engaged in a wheat production program, consistently planting an average of 5,000 to 7,000 hectares (HA) each year.

Figure 1: Presentation of new wheat varieties to local farmers



Source: INIAP

This program is designed to purchase 100 percent of local production from more than 500 small farmers, each cultivating less than two hectares (HA). As a result of this support, small farmers have seen significant yield gains, increasing from an average of 0.7 MT/ha to 2.20 MT/ha in recent years, with an overall average now at 2.00 MT/ha. In 2026, the National Institute for Research in Agriculture (INIAP) is expected to present a new variety called INIAP Yurak 2024, which is resistant to diseases, yields around 8 MT per hectare and contains 13 percent of protein.

Figure 2: Wheat harvest in northern provinces of the highlands



Source: Moderna Alimentos

In calendar year (CY) 2025, wheat ranked 32nd in planted acreage among Ecuador's 40 principal crops, down from 20th place in CY 2024, as other crops expanded their planted area more rapidly.

Consumption:

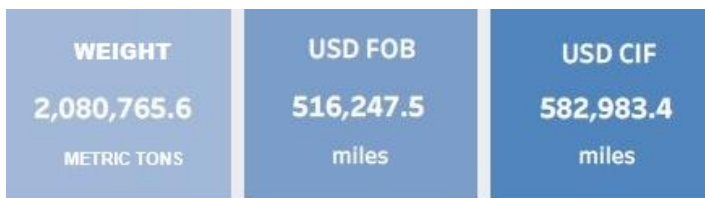
Wheat remains a vital component of Ecuador's animal feed sector, with use up 55 percent over the past decade. In the previous year, shrimp feed consumption increased on average 13 percent, while feed for poultry, pork, and other species surged by 16 percent, primarily driven by the substitution of wheat for corn in feed formulations. Notably, the pork industry continued to expand, growing 6 percent year after year. This increased use of wheat in animal feed highlights evolving formulation strategies within the sector and underscores the growing interdependence between crop production and livestock feeding practices.

Wheat consumption in MY 2026/27 is forecasted at 1.94 million metric tons (MMT), representing a five percent increase or 157,000 additional Metric Tons from the previous year. Ecuador's shrimp industry anticipates five percent growth in calendar year 2026, in line with last year's performance and reflecting a more conservative growing rate, according to GBM Media Inc.

Historically, wheat consumption in Ecuador was evenly divided between human consumption and animal feed. However, due to the recent increase in animal feed production and use of wheat in feed

formulations, the current breakdown shows that human consumption now represents 37 percent of total consumption, while animal feed accounts for 63 percent.

Figure 3: Total import by country of origin (CY 2025)



TOTAL IMPORTS PER COUNTRY

	WEIGHT (t)	FOB (USD miles)	CIF (USD miles)
Canadá	1,109,654.6	289,692.0	322,531.9
Estados Unidos	634,089.9	147,513.3	170,990.3
Brasil	178,734.0	41,022.8	45,647.1
Argentina	157,363.1	37,436.6	43,194.7
Chile	924.0	582.7	619.3

Source: SIPA MAGP

Of the wheat allocated for human consumption, 28 percent is utilized for pasta production, while the remaining 72 percent is used for bread and other bakery products. This segment of the market grows by about 3-5 percent per year, broadly in line with Ecuador’s population growth rate, according to the Ecuadorian Flour Millers Association (ASEMOL).

In MY 2026/27, Ecuador’s per capita wheat consumption for human use is projected to remain at 43 kilograms per year. The official wheat price during this period is expected to hold steady at \$24 per 45-kg bag. Wheat stocks for the bakery and pasta sectors are influenced by local production levels, with availability closely tied to the quality and quantity of the annual harvest.

Trade:

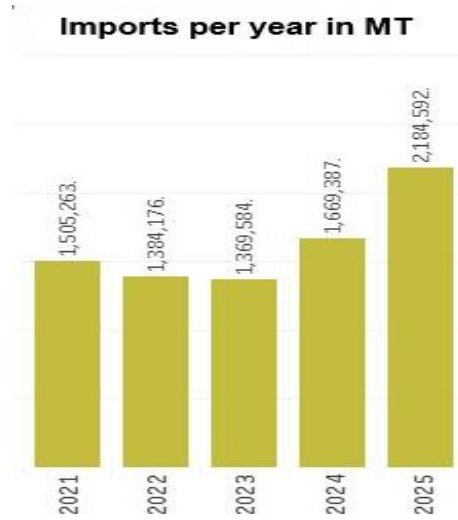
Wheat imports in MY 2026/27 are projected to reach 1.80 MMT, essentially flat from the previous year. Before 2016, Ecuador primarily used imported wheat for bread and pasta manufacturing. However, there has been a notable shift toward greater use of wheat in animal feed, driven mainly by the expanding shrimp industry and, more recently, pork production. Approximately 50 percent of imported wheat intended for feed is directed toward the shrimp industry, with the remainder allocated to various other animal feed sectors. This forecast assumes steady demand following the signing of the Agreement on Reciprocal Trade, between Ecuador and the United States.

The feed milling industry is not required to purchase local wheat production, as this obligation applies only to companies using wheat for human consumption. As a result, the feed milling industry remains a major buyer of imported wheat and accounts for an estimated 63 percent of Ecuador’s total wheat imports.

Ecuador maintains a diversified supplier base. Canada continues to be the principal supplier, accounting for 53 percent of market share, which reflects a slight increase from 47 percent in CY 2024. The United States holds a notable 30 percent market share, while Brazil ranks third with 8 percent. Argentina is in fourth place, and Chile rounds out the list of wheat suppliers to Ecuador.

U.S. wheat exports to Ecuador increased 32 percent in MY 2025, reaching 600 TMT, marking a record year in exports.

Figure 4: Ecuador’s wheat imports per Calendar Year in MT (2021-Nov 2025)



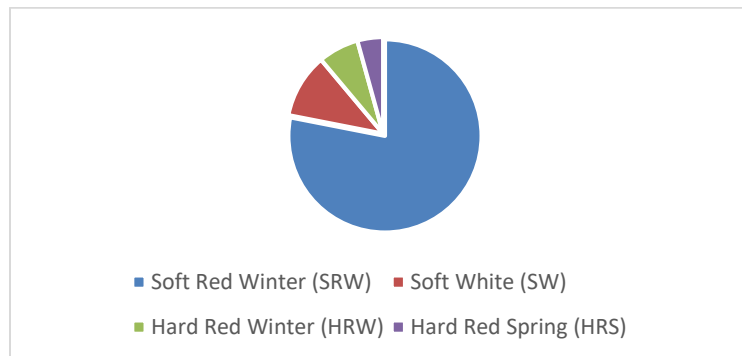
Source: USDA FAS QUITO /MAGP

Canadian wheat continues to lead the market and has remained Ecuador’s largest wheat supplier over the past decade, due to the historical advantages created by the Canadian Wheat Board (CWB), which for many years operated as an export monopoly and offered favorable terms and preferential services to Ecuadorian buyers. This contributed to Canada’s strong position in the market.

Imports from Canada are also preferred because of better logistics and competitive pricing, and it is used primarily in the pasta and bakery sector. Meanwhile, imports from Argentina, Brazil and Chile (which together account for about 17 to 20 percent of total imports), depends on price, quality and availability at the time of purchase. To optimize costs, pasta and bakery companies often blend wheat from various sources and qualities, according to ASEMOL and the Ecuadorian miller, Moderna Alimentos. This blending strategy helps to mitigate the impact of price fluctuations while ensuring that the final products meet flour formulation requirements.

In CY 2025, four classes of U.S. wheat were exported to Ecuador. Soft Red Winter (SRW) accounted for 78 percent of total U.S. wheat sales, followed by Soft White (SW) at 10.8 percent, Hard Red Winter (HRW) at 6.8 percent, and Hard Red Spring (HRS) at 4.3 percent.

Figure 5: Wheat import distribution CY 2025



Source: ASEMOL

In November 2025, a new Minister of Agriculture was appointed and has since increased oversight over the issuance of import licenses for a number of commodities, however, wheat imports don't receive the same level of scrutiny as others, but nonetheless, this creates an added layer of complexity for Ecuadorian millers. The feed industry has indicated that imported wheat is increasingly being used as a substitute for corn, driven largely by lower political sensitivity and more streamlined import licensing procedures. This reliance on imports underscores the significance of a stable wheat supply to support these key sectors of the economy, highlighting the importance of continued government support and strategic partnerships with global suppliers.

In Ecuador, the pasta and bread industries utilize local wheat, which accounts for less than 4 percent of the country's overall demand, complemented with imported grain in a range of 96 – 97 percent.

Policy:

Ecuador actively promotes a policy of wheat self-sufficiency; however, domestic production is unable to meet the country's overall wheat demand. On July 9th, 2021, Ecuador's Foreign Trade Committee issued Resolution No.009-2021, which lowered tariffs on 667 products, including 43 agricultural goods. The principal U.S. products benefiting from this tariff reduction are soybean meals (Harmonized System (HS code 2304.00.00.00) and wheat (HS 1001.19.00.00). This resolution permanently establishes zero tariffs, previously provided through rolling six-month exemptions, and abolishes the Andean Price Band System (APBS) duty for these two products, marking a significant shift in trade policy. This policy shift significantly enhances market access for U.S. wheat exporters, fostering an environment conducive to increasing import volumes. For further details on this policy, please refer to the [FAS Quito GAIN Report EC2021-0010](#).

Ecuador has established Free Trade Agreements (FTAs) with several countries, including Peru, Chile, and the European Union (EU), along with regional trade agreements through the Latin American Integration Association (ALADI). In 2004, Ecuador signed a tariff liberalization agreement with the Southern Common Market (MERCOSUR), which entered into force in April 2005. Within the MERCOSUR framework, wheat receives special treatment, as Ecuador offers tariff preferences that apply to the total duty, which includes both the ad valorem (basic) duty and the variable levy from the Andean Price Band System (APBS).

Ecuador's FTA with the EU entered into force on January 2, 2017, establishing a schedule for the gradual elimination of tariffs under the APBS in six equal stages. These agreements not only facilitate trade but also enhance Ecuador's access to various markets, positioning the country strategically in the international wheat supply chain.

Stocks:

Wheat stocks in Ecuador are primarily determined by local production levels and are significantly influenced by the quality and quantity of the annual harvest. However, some millers have encountered challenges in absorbing the entirety of local harvest due to fluctuating demand and quality concerns. As a response to these issues, many millers have opted to increase imports to meet the market demand. This shift in sourcing not only affects stock levels but also reflects the ongoing adjustments within the wheat supply chain as Ecuador navigates its reliance on both domestic and foreign wheat supplies to satisfy its consumption needs.

Import licenses are issued upon request for individual shipments, a system that limits importers' ability to purchase wheat futures and maintain larger inventories. In response to price volatility and the reduced number of import permits issued by the Ministry of Agriculture, millers have increasingly shifted toward smaller, more immediate purchases. As a result, current wheat stocks in Ecuador are estimated to be lower than in previous years, with millers holding reduced inventories.

Table 2. Corn Production, Supply, and Distribution

Corn Market Year Begins Ecuador	2024/2025		2025/2026		2026/2027	
	May 2024		May 2025		May 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	340	300	345	219	0	300
Beginning Stocks (1000 MT)	34	34	65	27	0	107
Production (1000 MT)	1500	1500	1525	1300	0	1800
MY Imports (1000 MT)	191	170	185	160	0	118
TY Imports (1000 MT)	192	170	190	160	0	118
Total Supply (1000 MT)	1725	1704	1775	1487	0	2025
MY Exports (1000 MT)	0	2	0	0	0	19
TY Exports (1000 MT)	0	2	0	0	0	19
Feed and Residual (1000 MT)	1570	1595	1650	1300	0	1600
FSI Consumption (1000 MT)	90	80	85	80	0	80
Total Consumption (1000 MT)	1660	1675	1735	1380	0	1680
Ending Stocks (1000 MT)	65	27	40	107	0	326
Total Distribution (1000 MT)	1725	1704	1775	1487	0	2025
Yield (MT/HA)	4.41	5	4.42	5.93	0	6
(1000 HA) ,(1000 MT) ,(MT/HA)						
MY = Marketing Year, begins with the month listed at the top of each column						
TY = Trade Year, which for Corn begins in October for all countries. TY 2026/2027 = October 2026 - September 2027						

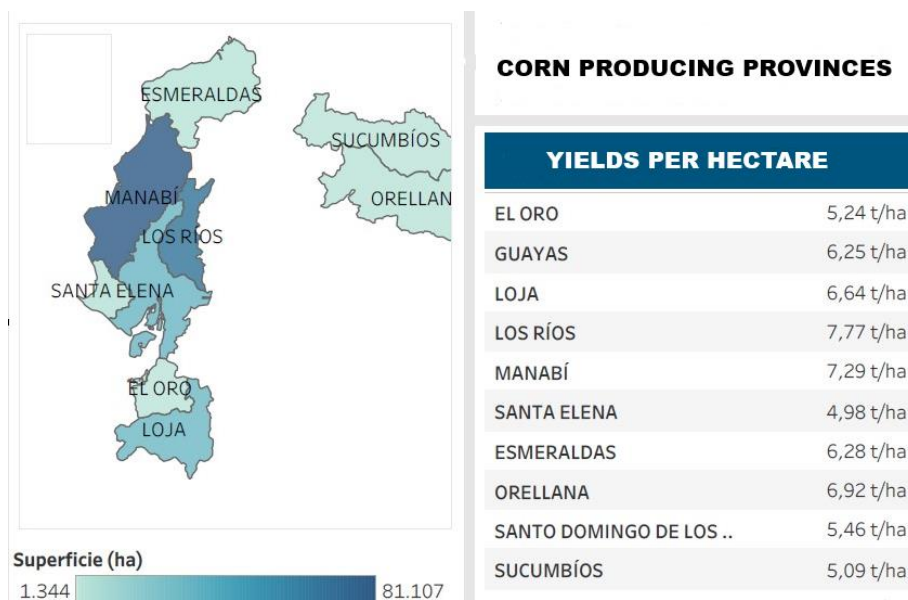
Corn production in MY 2026/27 (May-April) is projected to reach 1.80 MMT, a 28 percent increase from the MY 2025/26 estimate. This forecast is driven primarily by an additional 81,000 hectares harvested, along with higher yields expected to reach 6.00 MT per hectare. The nationwide average yield is projected to increase by nearly 2 percent, supported by new production areas in provinces, such as Loja, Esmeraldas Santa Elena, Sucumbíos and Orellana, where yields may reach as high as 9 MT per hectare according to the two national feed millers associations: APROBAL and AFABA. Significant

changes in land tenure are contributing to these improved yields as smaller, less efficient producers exit corn production, allowing medium and large producers to expand, using cutting-edge technology, with access to agricultural inputs such as fertilizers and pesticides, and having economic resources that result in better yields per hectare.

During calendar years 2023 and 2024, the number of medium and large corn producers surged, a trend that continued in 2025 and further enhanced production capacity. Additionally, an increasing number of farms are adopting mechanization and advanced agricultural technologies, including hybrid seeds, which are now utilized by 85 percent of farmers. This shift towards modernization and efficiency is pivotal in enhancing corn production in Ecuador.

Furthermore, there is a growing trend among small corn growers in Ecuador, particularly in the historically significant corn-producing province of Los Rios, to switch to alternative crops such as cacao or oil palm. This shift is driven by various factors, including market demand and the potential for higher profitability with these alternative crops.

Figure 6: Provincial yields



Source: Ministry of Agriculture

The Ministry of Agriculture and Livestock (MAG) is currently facing budget constraints, which have led to the suspension of specific corn production improvement programs aimed at small-scale corn farmers. In addition, MAG is no longer providing fertilizer subsidies as it did in previous years, although it increased technical assistance to corn producers during CY 2025. Although crop diversification and reduced government support could affect national production, these factors have been offset by new production areas and by new farmers with the financial capacity to adopt advanced technology on large-scale farms. Ecuadorian consumers, however, continue to face significantly higher prices for Ecuadorian corn products.

As of February 2026, the official minimum corn price was set at \$17.35 per hundredweight (CWT) equivalent to approximately \$382.41 per MT, reflecting a 5 percent increase compared to the previous year. The Ministry of Agriculture set a ceiling price of \$ 19.50 per hundredweight (CWT), as a measure to control intermediaries and hoarders, who have often sold corn at prices exceeding \$20.00 CWT (\$440.90 per MT). This price disparity has pushed many participants in the agro-industrial sector to seek alternatives, primarily by substituting wheat for corn in various applications. Rising corn costs and supply constraints have further influenced market dynamics, encouraging a shift toward more economically viable inputs.

Figure 7: Corn harvest and storage in the Ecuadorian coastal region



Source: Ecuadorian Agricultural Research Institute (INIAP)

Consumption:

Corn consumption in Ecuador is projected to increase to 1.68 MMT in MY 2026/27, reflecting a slight upward trend. This increase is largely attributed to an accelerated growth of the pork and pet food sectors. The livestock sector, which includes pork, poultry, and cattle, grew 6 percent in CY 2025.

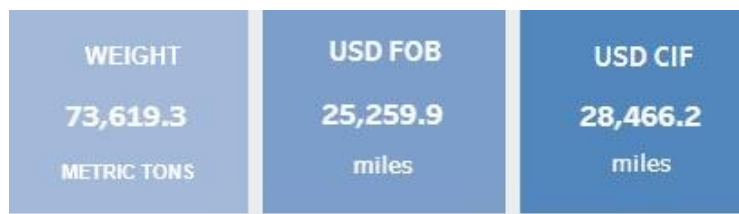
As Ecuador's agro-industrial sector evolves, consumption patterns have shifted noticeably, with increasing reliance on corn substitutes such as dried distillers' grains with solubles (DDGS). Lower wheat prices during MY 2025/26 combined with the Ministry of Agriculture's streamlined issuance of import licenses through November 2025, further encouraged this substitution trend.

Ecuador's Feed Producers Association (APROBAL) confirmed that animal feed producers are not only incorporating more wheat into their formulations but are also experimenting with various corn alternatives, including U.S. sourced DDGS. Notably, since February 2023, the import of DDGS has been incentivized as it can now be imported without the burden of the 12 percent value-added tax that previously posed a significant barrier. This change is likely to further accelerate the shift away from traditional corn usage in feed formulations.

DDGS have become a valuable component in Ecuador's shrimp (which is expected to increase 5 percent in CY 2026), pork, and poultry industries. During MY 2024/25, Ecuador imported a total of 72,712 MT, of DDGS, with the United States being the dominant supplier, accounting for 99 percent of the market. U.S. exports of DDGS reached 72,582 MT, marking a fourteen percent increase compared to the previous year. This growth in imports reflects the expanding acceptance and use of DDGS as an

effective feed alternative, further underscoring the shifts in Ecuador's agro-industrial sector as it seeks to optimize feed formulations and improve production efficiency across livestock and aquaculture industries.

Figure 8: Ecuador imports of DDGs during 2025 by weight (MT) and Value (FOB, CIF)



TOTAL IMPORTS PER COUNTRY OF ORIGIN

	WEIGHT (t)	FOB (USD million)	CIF (USD million)
Estados Unidos	73,489.4	25,223.0	28,422.9
Costa Rica	77.3	19.7	21.8
Georgia	52.6	17.3	21.5

Source: Ecuador Ministry of Agriculture

In addition to its substantial DDGS imports, Ecuador also imports an average of 10,000 metric tons (MT) of soft white corn and popcorn annually, primarily from Argentina and Chile, which holds a commanding market share of over 90 percent. While the United States does supply these types of corn, the volume is relatively modest, averaging around 260 MT per year. This highlights the strong preference for Argentine corn in Ecuador, which can be attributed to factors such as geographic proximity, established trade relationships, and competitive pricing. Industry sources indicate that 65-75 percent of local feed production in Ecuador is utilized by the national poultry industry, while 25-35 percent is allocated to other livestock production, primarily swine. Yellow corn consumption in Ecuador is heavily influenced by demand from the animal feed sector and by the availability of lower-priced corn substitutes. The poultry sector is expected to remain stable in 2026, similar to 2025. However, per capita consumption of poultry meat increased by 7 percent the last calendar year, reaching 31 kilograms per year, while egg consumption showed a negative trend, decreasing by 9 percent to 194 eggs per year.

Statistics from Ecuador's national poultry association (CONAVE) reveal that the poultry flock reached 299 million birds in calendar year (CY) 2025, a 7 percent increase from CY 2024. At the same time, the national pork producers' association (ASPE) reported that per capita pork consumption in CY 2024 was 12 kilograms. The pork industry produced approximately 3.2 million pigs, which in turn consumed about 500,000 metric tons (MT) of local corn and 1,000,000 MT of local feed, underscoring the significant demand for feed inputs in the livestock sector.

Trade:

Ecuador's corn imports in MY 2026/27 are projected to reach 118,000 MT, reflecting a production deficit identified by the feed industry. To help address this deficit, the Ministry of Agriculture and Livestock (MAG) has authorized wheat imports to be used as a substitute for corn. Ecuador imported a

total of 127,000 MT of corn in CY 2025 with Argentina emerging as the sole supplier, accounting for 99 percent of imports. During last calendar year, Argentina positioned itself as Ecuador's main supplier because its average price was 16 percent lower than that of U.S. corn. In addition, transportation costs from Argentina are lower, and Argentine corn is subject only to the 15 percent variable levy under the Andean Price Band System (APBS), making it more competitive than U.S. corn.

Ecuador considers corn a sensitive product and, as a result, applies both ad valorem and variable tariffs to imports from most origins under the APBS, except for products from countries with which Ecuador has trade agreements and from fellow members of the Andean Community (CAN) including Bolivia, Colombia, and Peru. Ecuador's status as an associate member of MERCOSUR and a member of the CAN facilitates the elimination or reduction of tariffs on intra-regional trade. These regional arrangements give neighboring countries a competitive advantage in exporting corn to Ecuador, placing U.S. grain at a price disadvantage.

Stocks:

Corn stocks in Ecuador are contingent upon local production and are influenced by the quality and quantity of the annual harvest. Current forecasts indicate that corn stocks may be higher than the previous year, driven by increase of local production and the strategic behaviors of intermediaries who are holding onto local production. This approach is part of an industry strategy to maintain sufficient inventories of grains and ingredients to meet up to two months of demand. These additional imports could further bolster corn stocks, helping to stabilize supply levels in the face of ongoing market dynamics and demand challenges.

Table 3. Rice, Milled, Production, Supply, and Distribution

Rice, Milled Market Year Begins Ecuador	2024/2025		2025/2026		2026/2027	
	Apr 2024		Apr 2025		Apr 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	320	280	315	280	0	280
Beginning Stocks (1000 MT)	254	254	154	194	0	194
Milled Production (1000 MT)	900	882	940	878	0	878
Rough Production (1000 MT)	1429	1400	1492	1596	0	1596
Milling Rate (. 9999) (1000 MT)	6300	6300	6300	5500	0	5500
MY Imports (1000 MT)	30	7	35	0	0	0
TY Imports (1000 MT)	30	7	35	0	0	0
Total Supply (1000 MT)	1184	1143	1129	1072	0	1072
MY Exports (1000 MT)	70	60	70	90	0	50
TY Exports (1000 MT)	70	60	70	90	0	50
Consumption and Residual (1000 MT)	960	889	960	788	0	823
Ending Stocks (1000 MT)	154	194	99	194	0	199
Total Distribution (1000 MT)	1184	1143	1129	1072	0	1072
Yield (Rough) (MT/HA)	4.46	5	4.73	5.7	0	5.7
(1000 HA), (1000 MT), (MT/HA) MY = Marketing Year, begins with the month listed at the top of each column TY = Trade Year, which for Rice, Milled begins in January for all countries. TY 2026/2027 = January 2027 - December 2027						

Production:

Rough rice production in marketing year (MY) 2026/27 is forecast at 1.59 million metric tons (MMT), with planted area remaining at 280,000 hectares, the same level as in MY 2025. Activities under the "Rice Cluster" continue to promote better agricultural practices and technologies, including laser leveling and more strategic water management in rice growing areas. These improvements are helping modernize rice production in Ecuador and enabling farmers to estimate production costs more accurately. However, rice production in Ecuador remains challenging due to adverse weather patterns, particularly flooding associated with El Niño, which continues to contribute to high production costs in this sector. As of February 2026, rice producing provinces such as Guayas, Manabi, and Los Rios are experiencing heavy rains and flooding. To support local rice production, the government continues to implement measures such as setting minimum price thresholds and limiting imports, even though Ecuador is largely self-sufficient in rice production.

According to the Ecuadorian Rice Millers Corporation (CORPCOM), rice production costs currently range from \$1,800 and \$2,240 per hectare, averaging 17 percent higher than in CY 2025 depending on the level of technology used by producers. Despite these efforts, a continuing trend among small producers in Los Rios and other provinces is the shift toward more profitable crops such as oil palm, cacao, and corn, with some producers in Guayas also moving into sugarcane production. This diversification reflects the economic pressures and changing market conditions facing rice producers in Ecuador

Ecuadorian rice producers also continue to adopt improved rice varieties. The National Institute of Agricultural Research (INIAP), with financial support from the Research Fund for Agrobiodiversity, Seed and Sustainable Agriculture (FIASA), has developed two promising rice lines that could significantly improve rice production in Ecuador, with yields expected to reach 9 MT per hectare. These new varieties, which are currently in the genetic seed multiplication stage, were officially registered with the Ministry of Agriculture, Livestock and Fisheries (MAGP) at the end of CY 2025 and are expected to become available to producers during the first half of CY 2026. Typically, Ecuadorian farmers have two harvests per year in irrigated fields.

For the current year, industry sources expect winter planting of approximately 125,000 hectares and summer planting of about 155,000 hectares. However, as of late February 2026, MAGP has projected that the winter harvest may face difficulties due to adverse weather conditions.

Additionally, many farmers are reluctant to leave fields fallow, resulting in the common practice of keeping rice fields in continuous production at different stages of growth throughout the year in Ecuador's lowlands without implementing crop rotation. This continual cropping strategy can contribute to soil degradation and may affect long-term sustainability, but farmers often prioritize maximizing production in response to market demands.

Average rough rice yields in MY 2026/2027 are forecasted to reach 5.7 MT/HA, unchanged from MY 2025/2026. Rice production in Ecuador is predominantly concentrated in the coastal regions, with Guayas province, accounting for 71 percent of the planted area. Los Ríos and Manabí follow, while Loja has a smaller production area of approximately 3,000 hectares near the border with Peru. The coastal region typically experiences flooding during the November-April rainy season and retains moisture throughout much of the year. Rice production is highly variable, heavily influenced by rainfall patterns, with the largest harvests typically occurring at the end of the rainy season, between May and

June. This dependence on seasonal rainfall can significantly affect overall production levels and farmers risk management strategies.

Figure 9: Rice field, Loja Province



Source: Ministry of Agriculture

In Ecuador, approximately 50 percent of the planted rice area is sown during the summer months, with irrigation access being a key limiting factor for farmers. Irrigation systems and the related equipment have historically been prohibitively expensive, making large-scale production difficult for smaller farms. Historically, Ecuador's rice growers were largely subsistence farmers, with about 75 percent operating farms of five hectares or less. More recent estimates from FAS/Quito suggest a significant shift in the sector's composition: producers with up to 20 hectares now account for 75 percent of the total, while producers with more than 20 hectares represent the remaining 25 percent. This change points to a gradual transformation in Ecuador's rice industry, as medium-sized and large-scale farms become more prominent, likely because of their better access to resources, technology, and irrigation systems. The shift has important implications for production costs, yields, and the overall competitiveness of Ecuador's rice sector in both domestic and international markets.

Consumption:

Rice is a staple food in Ecuador, with almost all local production being consumed domestically. Total rice consumption in MY 2026/27 is forecast at 823,000 MT, an increase from the previous year driven primarily by population growth. Estimated per capita consumption in Ecuador currently ranges from 45 and 50 kilograms per year, with the industry aiming to raise that figure to 51 kilograms per year. Rice is the most widely consumed carbohydrate in the coastal region, where it is commonly eaten three times a day. In the highlands, rice is typically consumed at least once per day.

Several factors influence per capita rice consumption, including spoilage of older stock and a rising trend in the use of rice and rice byproducts as animal feed. This dual role of rice, as both a staple food for human consumption and as an input in animal feed, underscores its importance in the Ecuadorian diet and economy, reflecting ongoing shifts in agricultural practices and consumption patterns.

Figure 10: Rice Mill, Guayas province



Source: CORPCOM

In Ecuador, the Ministry of Agriculture and Livestock (MAG) establish farm gate rice prices through a national price band system. Since 2022, the official price for short grain paddy rice has been set at \$34.00 per 200-pound (91 kg) sack, equivalent to approximately \$374.50 per metric ton (MT). For long grain paddy rice, the official price is \$36.00 per 200-pound sack, or around \$396.50 per MT. However, according to the Ecuadorian Rice Millers Corporation (CORPCOM) market prices for paddy rice remained within the official price range during 2025 and early 2026, even though the rice industry reported difficult market conditions and low prices despite government interventions to manage surpluses.

Informal trade from neighboring countries, particularly Peru, declined in calendar year (CY) 2025, due to adverse regional weather conditions and rising production costs. For processed products, the average price for milled rice fluctuates between \$650 and \$700 per MT. Currently, fewer than 300 rice mills are operating in Ecuador, down from a total of 450 established mills. Industry contacts suggest that this number is likely to continue declining in the coming years, indicating consolidation within the rice milling industry as market conditions evolve.

Trade:

Since 2019, the MAG in Ecuador has expressed interest in exporting substantial quantities of rice to other Latin American countries. According to the Ministry of Agriculture, rice exports to Colombia surged to a record 63,000 MT in CY 2024, then declined to 49,000 MT in CY 2025. Colombia remained Ecuador's primary export destination, accounting for 99 percent of total rice exports that year. The United States ranked second with 411 MT, followed by Peru with 398 MT.

Ecuador's rice exports to Central America and the Caribbean have fluctuated over time, peaking in CY 2021 and tapering off since then. For MY 2026/27, rice exports are projected at 50,000 MT, assuming exports to Colombia remain broadly consistent with the volume observed in MY 2025/26. As of February 2026, however, a trade dispute between Ecuador and Colombia is directly affecting Ecuadorian rice exports. On February 24, 2026, the Colombian government officially imposed a 30 percent tariff on imports covering 23 tariff items, broken down into 73 tariff subheadings, for products

originating in Ecuador. This measure was a direct response to the 30 percent “security tax” imposed by the Ecuadorian president on February 1, 2026, on Colombian goods.

Ecuador and Colombia are currently engaged in official talks to solve these trade and political disputes. Historically, Ecuador exports its winter harvest to Colombia beginning in Abril-May and concluding between September and November of the calendar Year.

Figure 11: Colombian advertisement informing that Colombia will charge a 30% duty to Ecuadorian rice



Source: ICA Colombia

In calendar year CY 2025, informal rice imports from Peru are estimated at approximately 30,000 MT, according to local industry sources. These shipments typically move through unofficial routes and dry riverbeds along the Ecuador-Peru border. Industry sources also report informal exports of Ecuadorian rice to Colombia, likewise, estimated at around 30,000 MT during the same period.

Historically, registered rice imports in Ecuador have been minimal. However, a decline was reported in CY 2025, with total imports reaching 515 MT, according to the MAGP. The United States was the leading supplier, accounting for 231 MT of those imports.

Other countries, including Italy, Spain, Uruguay, and Argentina, also supplied small volumes of rice to Ecuador. These imports are often influenced by preferential terms granted under trade agreements, specifically the European Union Free Trade Agreement (EU FTA) and the MERCOSUR agreement. These agreements allow Ecuador to source rice from a range of international suppliers, although overall import volumes remain very low relative to domestic production. As the local rice industry continues to navigate market dynamics and price fluctuations, the role of imports could evolve, particularly if domestic supply constraints or pricing pressures emerge.

Stocks:

For MY 2025/26, rice stocks in Ecuador are forecast to remain in line with previous estimates. This projection is based on the expectation that the industry and rice mills will maintain inventories

equivalent to at least three months of consumption, or about 65,000 MT per month, while also covering potential additional exports.

The Ecuadorian Rice Millers Corporation (CORPCOM) projects that stocks will reach approximately 199,000 metric tons (MT), held within rice mills and intermediary warehouses. It is also important to note that the MAG National Storage Unit (UNA) was fully dismantled, indicating a shift in how rice stocks are managed in the country.

The absence of a centralized storage unit places greater emphasis on private-sector stock management and may affect market stability, pricing, and rice availability during the forecast period. This situation creates both opportunities and challenges as stakeholders adapt to changes in Ecuador's rice production, storage, and trade system.

Policy:

Rice imports in Ecuador is a politically sensitive issue, reflecting the government's strong commitment to promoting rice self-sufficiency. To support local production, the government has implemented strategies such as setting farm gate prices significantly higher than regional averages, maintaining an Agricultural Price Band System (APBS), and seeking to limit imports through presidential decrees.

The APBS is recalculated bi-monthly, at the beginning and middle of each month, to adjust tariffs in response to market conditions. Member countries of the CAN are exempt from the APBS and are assessed a zero tariff. However, even for these countries, a ministerial decree is required before an import permit can be issued.

Other Latin American nations benefit from ad valorem tariff preferences under the Latin American Integration Association (ALADI), but they are still subject to the Andean Price Band System (APBS) variable levy. In the case of rice imports from the United States and other countries, Ecuador imposes a consolidated tariff of 67.5 percent to safeguard domestic rice production, as established in the COMEX Resolution No.020-2017, that reformed in full the Ecuadorian tariffs for all products imported to Ecuador.

Furthermore, Ecuador has established domestic minimum support prices that rice mills are obligated to pay farmers throughout the country. These measures are designed to stabilize the local rice market, ensure that farmers receive a fair price for their product, and promote the overall health of the agricultural sector in Ecuador. Collectively, these policies significantly shape the landscape of rice imports and exports in the country.

For CY 2026, the Rice Consultive Committee, composed of the Ministry of Agriculture, rice producers, and millers, set the domestic minimum support price for a 205 pounds bag at \$34 for short grain paddy rice and \$36 for long-grain paddy rice.

Currently, the Government of Ecuador is implementing Executive Decree No. 596, which authorizes the purchase, storage, and sale of rice through private mills under a coordinated public-private framework. The decree establishes direct procurement mechanisms to support small and medium-sized producers, with delegated management and public purchasing designed to ensure fair prices, reduce intermediation, and strengthen the rice value chain. In addition, the Ministry of Agriculture is seeking to incorporate rice procured through these public purchases into the National School Feeding Program.

Attachments:

No Attachments