



Current situation of the shrimp industry in Ecuador



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About Ecuador



Location: South America

North Border: Colombia

South Border: Peru

West Border: Pacific ocean

Capital: Quito

Currency: United States dollar

Population: 14,666,055

Area: 258,238 Km²

Shrimp industry in Ecuador



- Shrimp ponds are located in five provinces: Guayas (60%), El Oro (20%), Manabí (9%), Esmeraldas (9%), Santa Elena (2%).

- Second largest exported product after oil.

Ecuadorian shrimp in numbers -2017

220,000

Hectares for shrimp
farming

100,000

Direct and indirect jobs
related to farm and
processing

3,037

USD millions
exported *BCE

438,000

MT exported in 2017

195,000

Direct and indirect jobs
related to the industry

4th.

Shrimp supplier to US
71,787 MT

Global shrimp production

	Asia Total	Latinoamérica Total	Total Mundial
2010	2.950.936	475.238	3.426.174
2011	3.169.318	496.392	3.665.710
2012	3.380.281	511.397	3.891.678
2013	2.864.018	502.462	3.366.480
2014	3.018.800	608.698	3.627.498
2015	3.147.931	679.557	3.827.488
2016*	3.611.099	723.458	4.334.557

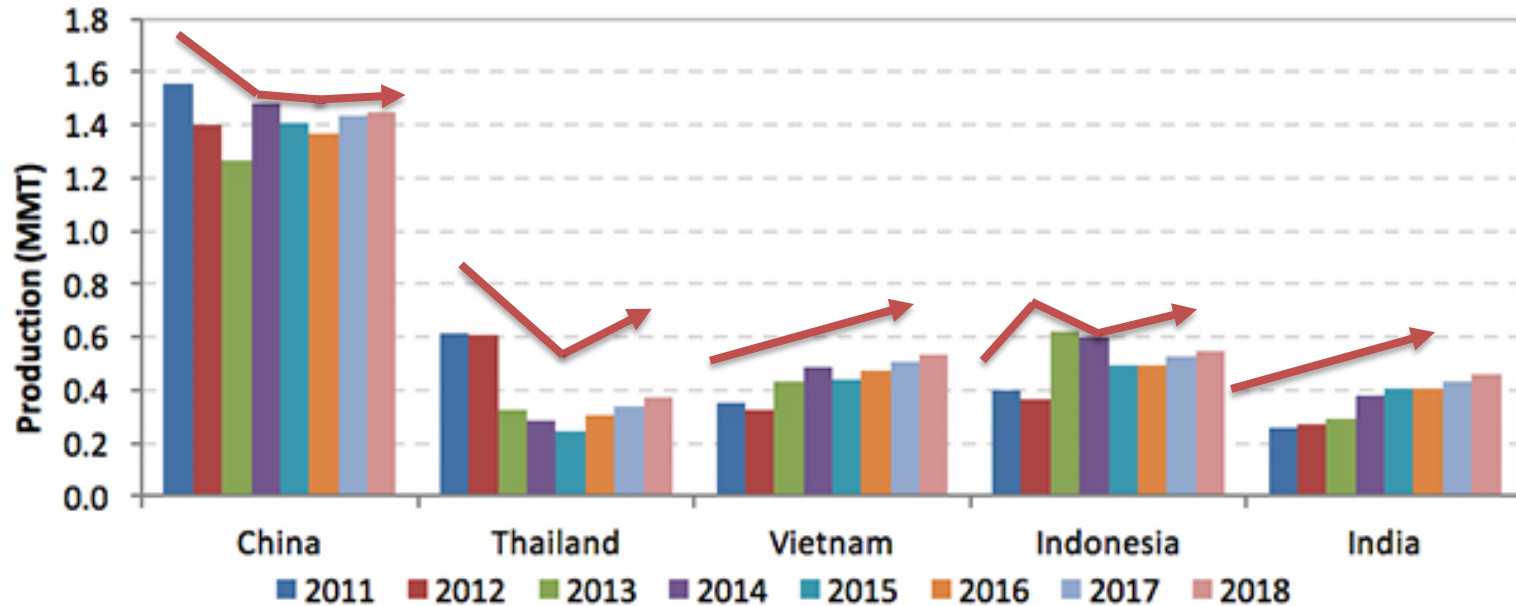
expressed as MT*

Context of global shrimp production Latin America

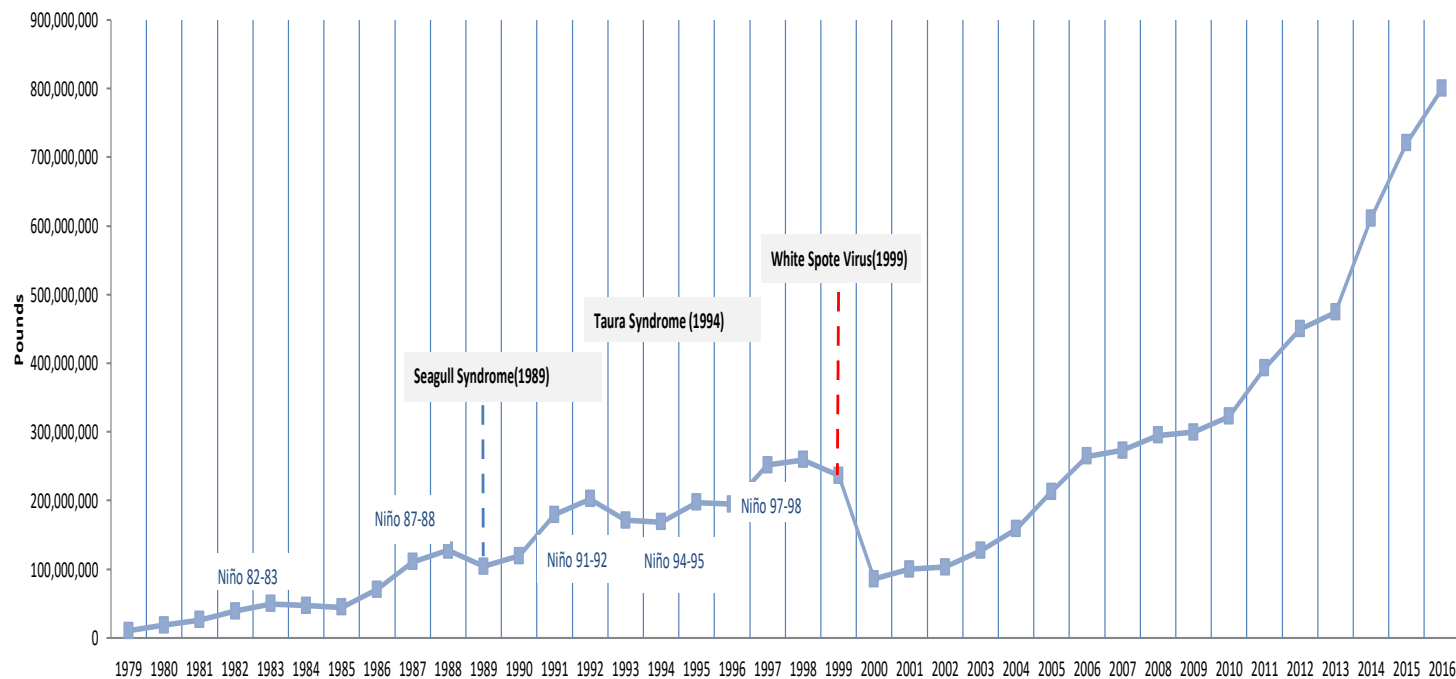
	2010	2011	2012	2013	2014	2015	2016
Ecuador	146.204	178.019	204.024	215.109	277.166	327.412	368.181
Rest of Latin America	329.034	318.373	307.373	287.353	331.532	352.145	355.277
TOTAL LATIN AMERICA	475.238	496.392	511.397	502.462	608.698	679.557	723.458

in MT

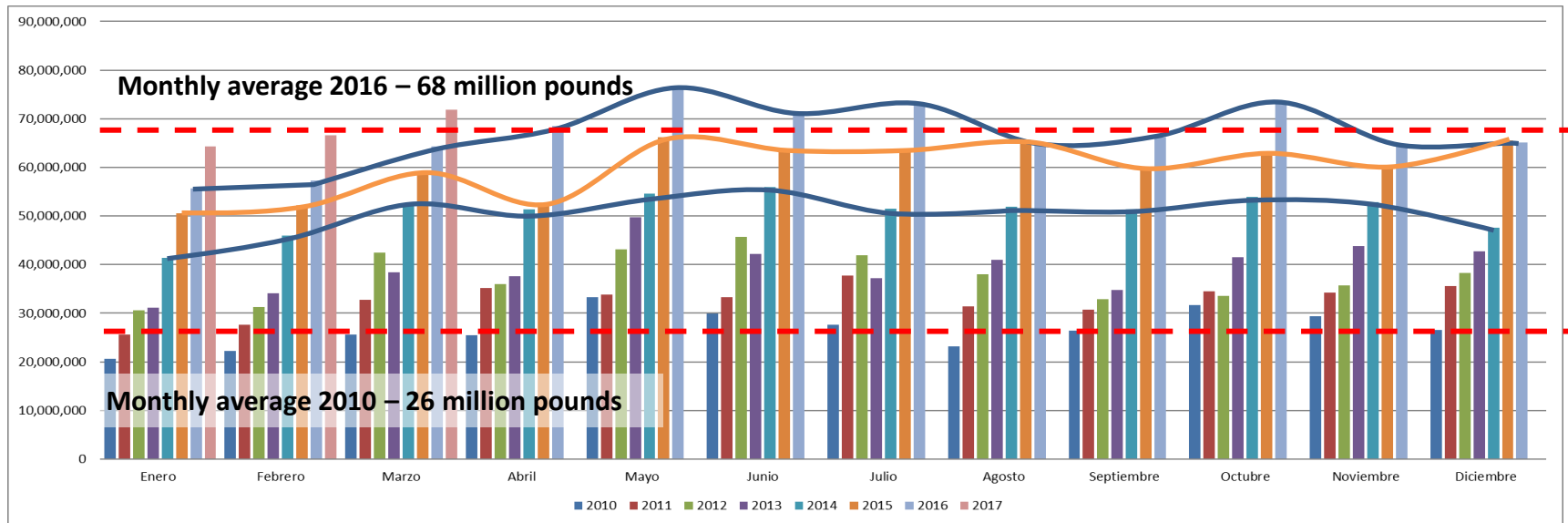
Production trends- Asia



Ecuador: Shrimp production and trade (1979 - 2016)

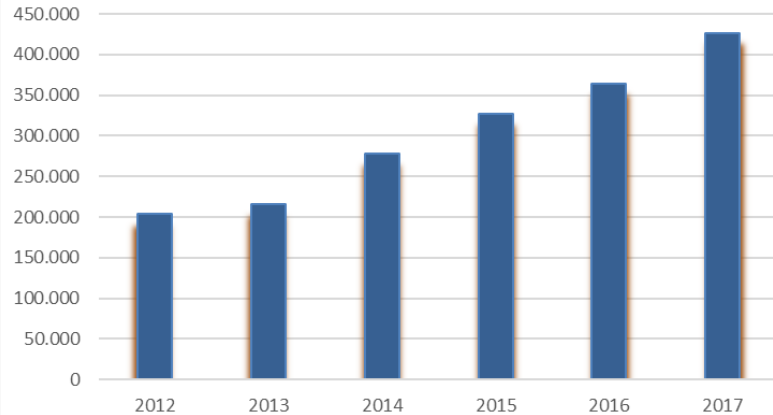


Ecuador monthly exports 2010 - 2017

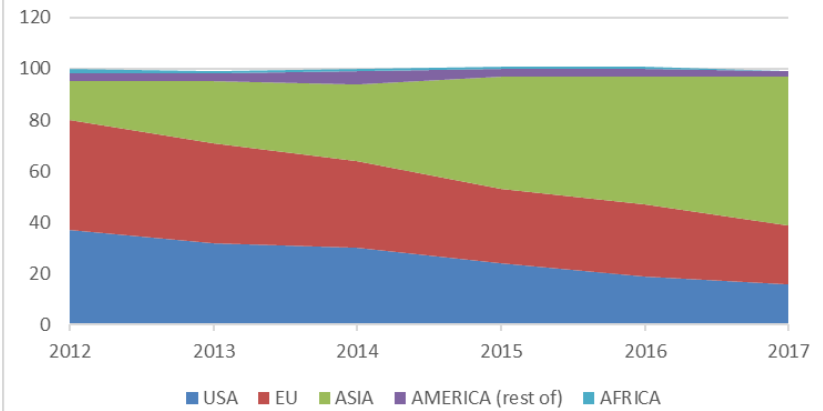


MARKERT SHARE OF ECUADORIAN SHRIMP (%)						
REGION	2012	2013	2014	2015	2016	2017
USA	37	32	30	24	19	16
EU	43	39	34	29	28	23
ASIA	15	24	30	44	50	58
AMERICA (rest of)	3	3	5	3	3	2
AFRICA	2	1	1	1	1	0
TOTAL (MT)	204.453	215.562	277.749	327.413	363.570	426.629

Shrimp exports (MT)



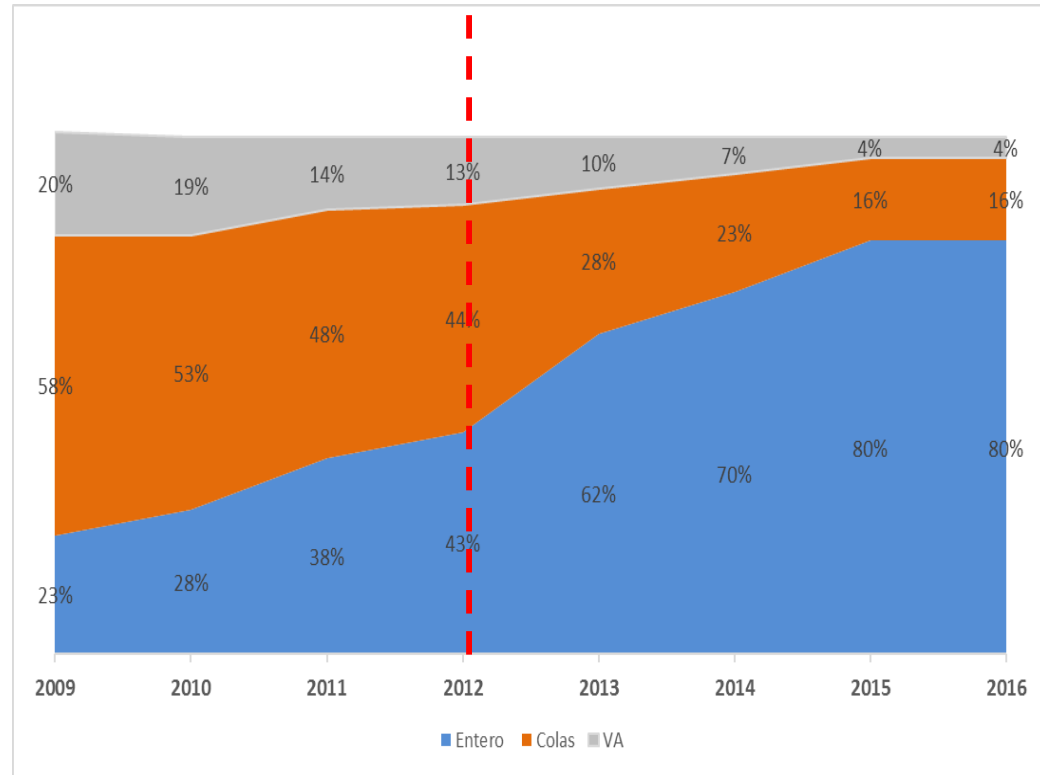
Market share



Sales by product type

The opening of the Chinese market has significantly stimulated the export of whole shrimp from Ecuador in recent years. This phenomenon has the following consequences:

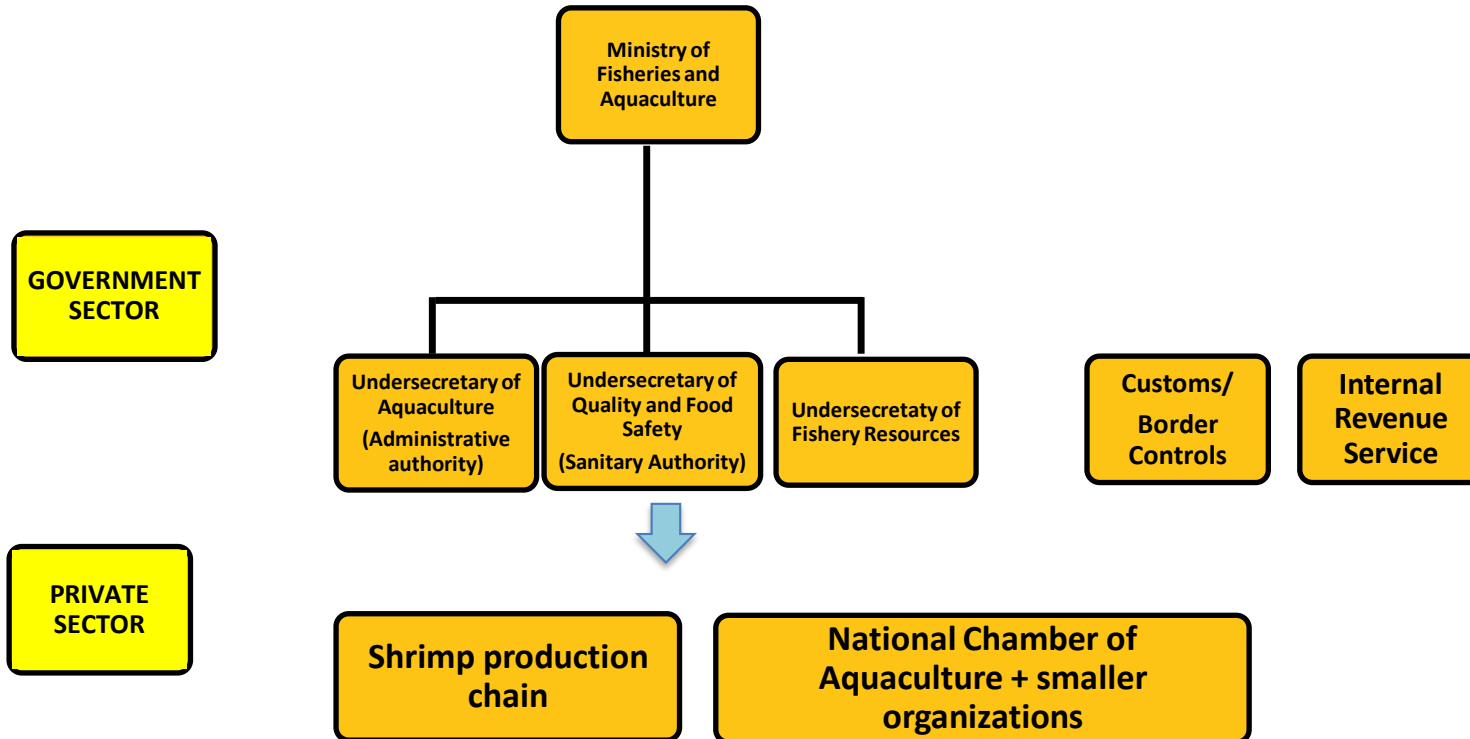
1. Increases export volume (33% more exported in pounds that do not fall off)
2. The export of whole shrimp implies more foreign exchange when exporting more volume
3. Improves profitability for the industry (better prices for the producer, greater productivity in shrimp and plants)



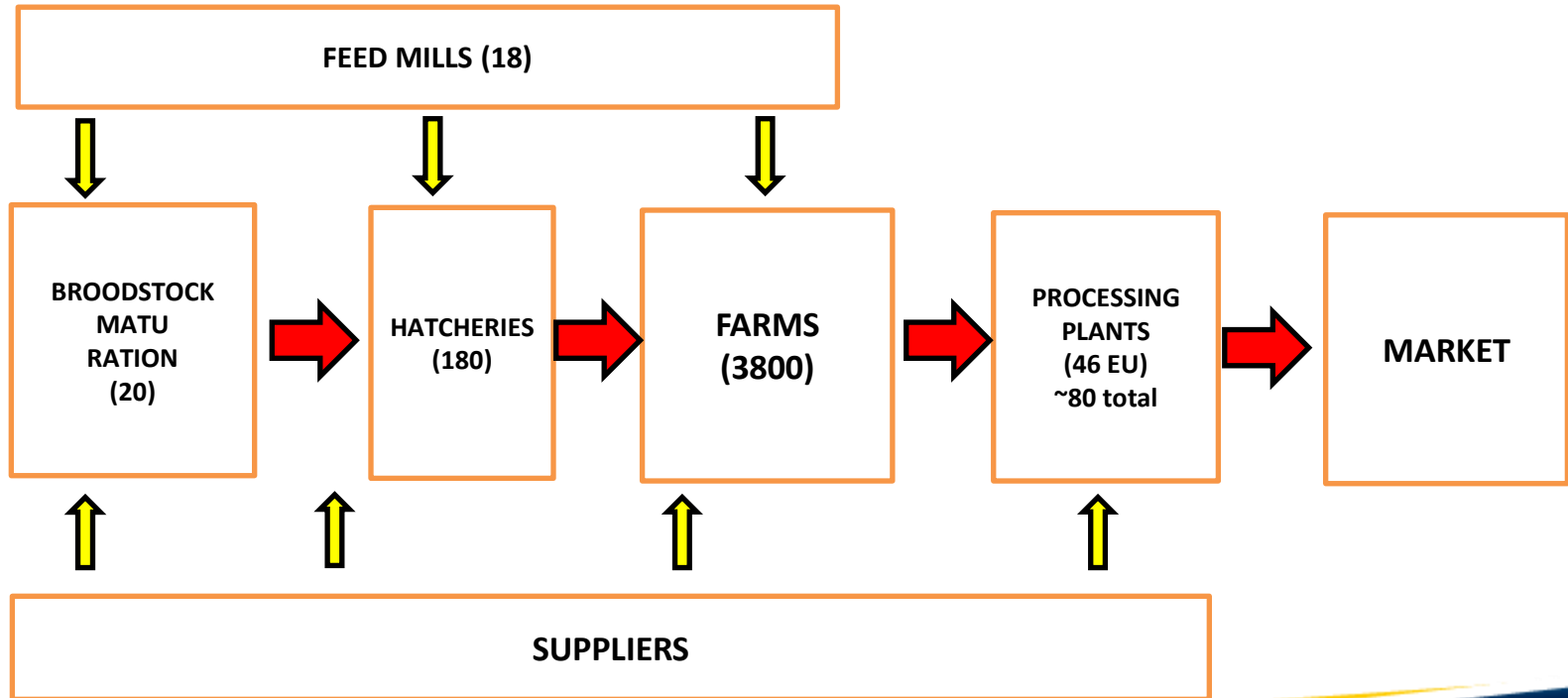


**What is
Ecuador
doing?**

Structure and institutions



Shrimp production chain in Ecuador





**ENVIRONMENT
AND
PRODUCTION**

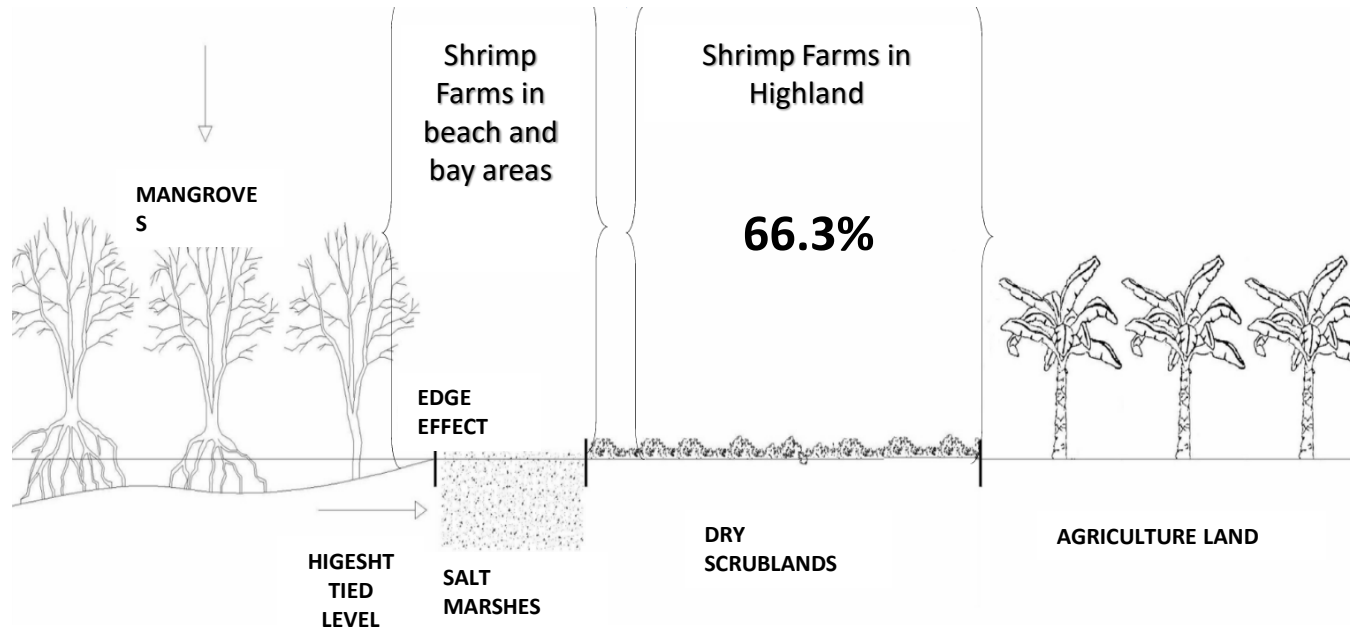
Sustainability

SURFACE	1969	1984	1987	1991	1995	1999	2006	2015*
Mangroves	202.201	182.157	175.157	162.186	146.938	149.556	148.230	148.230
Shrimp farms	300	89.368	117.728	145.998	178.071	175.253	175.748	213,032
Salt marshes	52.938	20.022	12.273	6.320	5.109	4.531	3.705	3.705

in hectares

Ecuadorian Shrimp Industry operates a production model that seeks sustainable growth without a significant yearly increasing since 1999 (1.4%).

Farms Geographic location



66.3% of all shrimp ponds are located in private land and **33.7%** in intertidal territories.

Production model

**Low density
systems**



**Production
Efficiency**

**Lower
risk of
diseases**

**Environmental
friendly
production**

Disease prevention

Ecuadorian shrimp is produced with probiotic elements, which do not affect the product, the environment or people. Ecuador implemented widespread use of probiotics, microorganisms that benefit the environment and crop species. Since 2005 no alerts for the presence of antibiotics or controlled substances in ecuadorian shrimp have been reported in the Ecuadorian shrimp industry.



Water Quality



Water quality of the effluents is better than the entering farming systems since shrimp farms act as settlers, allowing to reduce suspended solids in the water and fulfill local regulations and international best practice standards.

Mangrove Reforestation

Two thirds of the shrimp production area are located in upland territory, i.e. private lands not suitable for agriculture, meaning no mangrove areas are affected



Nowadays , shrimp sector is the essential actor that reforests mangrove in Ecuador society.



81% of shrimp farmers located in inter-tidal lands are medium and small producers, with extensions less than 50 hectares.



One third of the shrimp production areas correspond to beach and bay, i.e. near mangrove areas, which are concessioned by the state to producers who have settled mostly on salt marshes / salt flats

National Control Plan

- The Undersecretary of Quality and Food Safety (SCI) is the Competent Authority of Ecuador on the health issue for the fisheries and aquaculture sector.
- The Undersecretary of Quality and Food Safety fulfills its role through the implementation of the National Control Plan (PNC).
- PNC is the regulation that describes the protocols applied by the SCI of Ecuador to do health checks on fishery and aquaculture products. The main objective is to provide government guarantees regarding to harmlessness of the products that are required by importing countries.



Subsecretaría de Calidad e Inocuidad

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Ecuador

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- Verificación regulatoria
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GOBIERNO DE LA REPÚBLICA DEL ECUADOR

Puerto Pesquero Artesanal de San Mateo
Manta - Ecuador
Teléfono: 593-5 2666 -109 ext. 101

- Últimas noticias
- VICEMINISTRA VILLACÍS INAUGURA EXPOPESCA 2018
- ECUADOR CONFÍA EN FALLO POSITIVO EN CASO POR CUOTA DE CAPTURA DE JUREL
- COREA DONA EQUIPOS DE ANÁLISIS PARA PRODUCTOS DE PESCA Y ACUACULTURA
- Convocatoria institucional
- "ECUADOR ASEGURA LA SOSTENIBILIDAD EN EL LARGO PLAZO DE LA INDUSTRIA DEL ATÚN": DROUET

Public information

The screenshot shows a web browser displaying the website www.acuaculturaypesca.gob.ec. The page features a header with the logo of the 'MINISTERIO DE ACUACULTURA Y PESCA' and a background image of a fountain. The main content area is titled 'Lista de establecimientos Internos y Externos aprobados' and includes a description of the control process. A dropdown menu is visible, showing 'Listas internas: establecimientos aprobados'. On the right side, there is a section for 'Últimas noticias' with a list of recent news items.

MINISTERIO DE
ACUACULTURA Y PESCA

Ecuador

MENÚ

Lista de establecimientos Internos y Externos aprobados

Mediante el Acuerdo Ministerial 227 (Plan Nacional de Control), el Instituto Nacional de Pesca efectúa el control de toda la cadena productiva y de trazabilidad de los productos pesqueros y acuícolas que se exportan. Solo los establecimientos que cumplen los requerimientos establecidos, son publicados en la página web del INP en las siguientes listas:

Lista Interna: Es para proveedores primarios, como camaroneras laboratorios de larvas, embarcaciones artesanales, entre otros.

Lista Externa: Constarán en esta lista, los procesadores que cumplen con los todos los requisitos para exportar sus productos, como procesadores pesqueras, procesadoras acuícolas, entre otras.

Listas internas: establecimientos aprobados

Últimas noticias

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<http://www.acuaculturaypesca.gob.ec/lista-de-establecimientos-internos-y-externos-aprobados>

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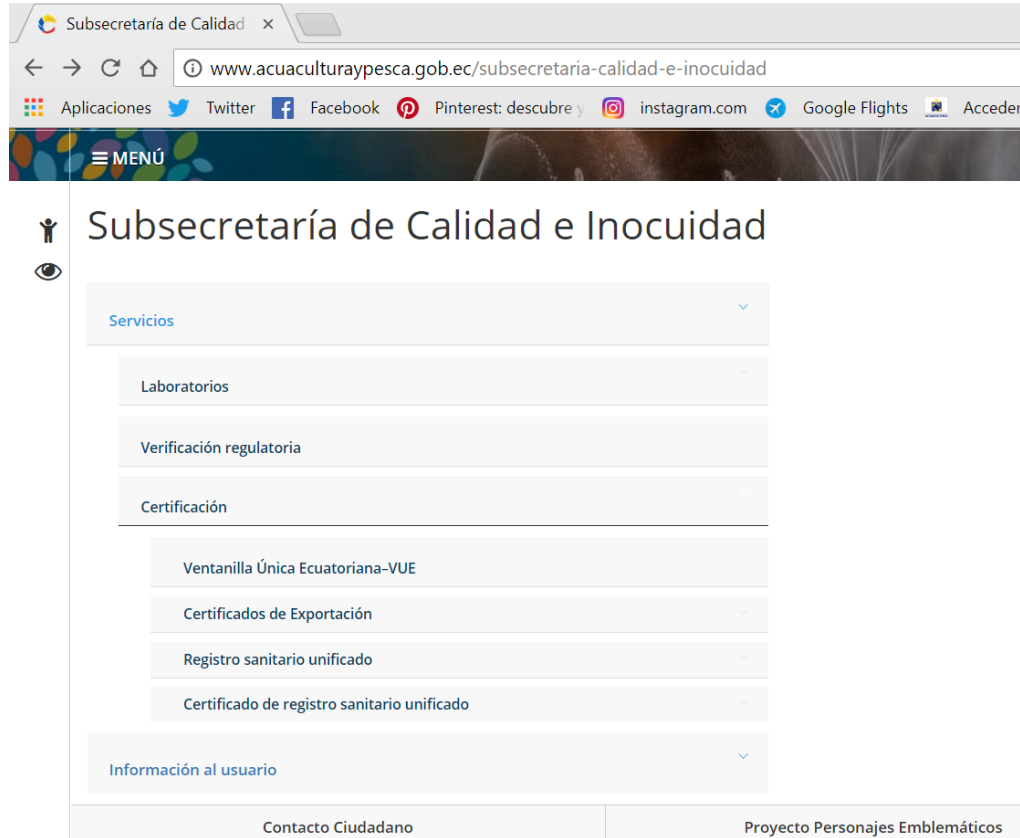
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SUBSECRETARÍA DE CALIDAD E INOCUIDAD - S.C.I.

CAMARONERAS REGISTRADAS Y APROBADAS

#	CÓDIGO	NOMBRES	DIRECCIÓN ESTABLECIMIENTO	TELEFONOS	CONTACTOS
1	GR-75	EXPLOMARSA S.A	OFICINA EL ORO, MACHALA PARR. LA PROVIDENCIA, AV 25 DE JUNIO SN KM 1.5 REF. FRENTE A ETAPASHION ESTABLECIMIENTO GUAYAS, NARANJAL, PARR. TAUBA LOTE A-B JUANTO A CAM. AQUAM VIA CHURUTE	300-072980330 300-072983670	LAURA VALERIA FELDOO GONZAGA
2	GR-121	GAMBALIT S.A.	URBANIZACION SANTA LEONOR, SECTOR 4A, MZ. 11, V. LOTE21	042296012 - 042162000	ATILIO EDUARDO CASTANO BAQUERIZO
3	GR-127	NUTRONEG S.A. MANUEL LITUMA ULLLOA	PEDRO MONCAYO 711 EDIF. LA TORRE OFICINA 1 HACIENDA AYALA S ESTERIO EL CEIBO - PTO. EL MORRO GUAYAS	072885024-099613887	MANUEL SALVADOR LITUMA ULLLOA
4	GR-128	TERCERIZADORA DE SISTEMAS Y ORGANIZACIONES, ORSISTEA S.A.	CIDLA, SAN FELIPE MZ133 SOLAR 30	090808113 - 042203534	CARLOS MARTIN VILLEGAS NUÑEZ
5	GR-129	CAMARONERA MANANTIAL DE CHANDUY S.A. CAMACHASA	KM 16.5 VIA A LA COSTA	042737400	VICTORIA AUGUSTA VERDUGA CEVALLOS
6	GR-131	GLADYS ESPERANZA CASTRO GONZABAY	CALLE ESTERIO BUAYLA SN ENTRE OCTAVA NORTE	0993762302	GLADYS ESPERANZA CASTRO GONZABAY
7	GR-135	WASHINGTON ROBERTO SANCHEZ ZAMBRANO	CIDLA, PARÁISO, VÉCTOR FELDOO - SANTA ROSA, EL ORO - PUERTO DOLORES, ESTERIO CHUPADORES, ARCH. JAMBELL	072944202 - 0990004437	WASHINGTON ROBERTO SANCHEZ ZAMBRANO



The screenshot shows a web browser window with the address bar displaying www.acuaculturaypesca.gob.ec/subsecretaria-calidad-e-inocuidad. The browser's address bar includes navigation icons (back, forward, refresh, home) and social media links for Twitter, Facebook, Pinterest, and Instagram. Below the browser window, the website's header features a 'MENÚ' icon and the title 'Subsecretaría de Calidad e Inocuidad'. The main content area is a vertical sidebar menu with the following items: 'Servicios' (with a dropdown arrow), 'Laboratorios', 'Verificación regulatoria', 'Certificación' (with a dropdown arrow), 'Ventanilla Única Ecuatoriana-VUE', 'Certificados de Exportación' (with a dropdown arrow), 'Registro sanitario unificado' (with a dropdown arrow), 'Certificado de registro sanitario unificado' (with a dropdown arrow), and 'Información al usuario' (with a dropdown arrow). At the bottom of the sidebar, there are two buttons: 'Contacto Ciudadano' and 'Proyecto Personajes Emblemáticos'.

<http://www.acuaculturaypesca.gob.ec/subsecretaria-calidad-e-inocuidad>



Establecimientos autorizados a los Mercados Internacionales

La Subsecretaría de acuacultura y pesca, tiene homologada su Autoridad Sanitaria en los mercados de mayor importancia con los países que Ecuador tiene relación comercial, tales como Argentina, Brasil, Rusia, Guatemala, Nicaragua, Unión Europea, Corea, China, entre otros. Por aquello los requisitos sanitarios para exportar productos pesqueros y acuícolas difieren o pueden variar para cada mercado.

Establecimientos autorizados a los mercados internacionales

- Argentina
- Brasil
- Guatemala
- Nicaragua
- Corea
- China
- Rusia
- Unión Europea

Últimas noticias

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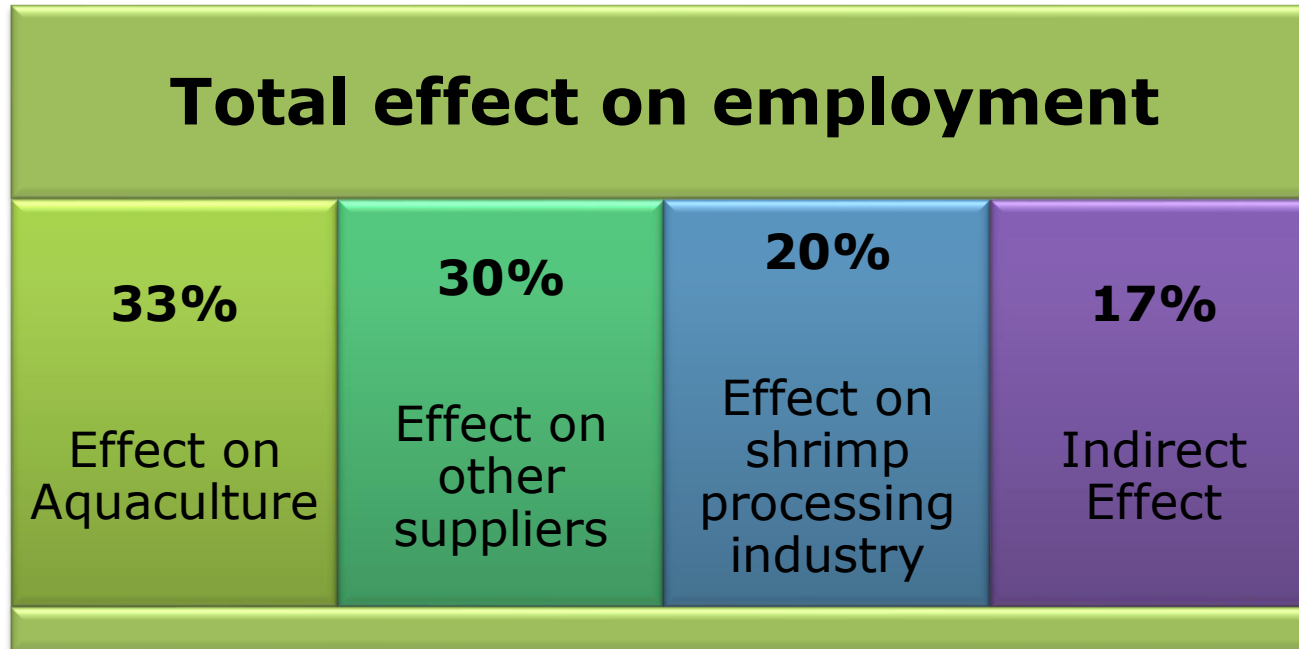
<http://www.acuaculturaypesca.gob.ec/establecimientos-autorizados-a-los-mercados-internacionales>



SOCIAL CONCERNS

Job Creation

Shrimp Industry sustains 195,000 jobs in Ecuador



Ecuador stands out in terms of **technology**:



Human Capabilities

- Ecuadorian experts of shrimp production have moved to different countries like Egypt, Mexico, Indonesia, China and Thailand for training others.



Technology

- Ecuador leads global technology applied to shrimp aquaculture.
- The exported knowledge is reflected in the improvement of production systems in competitive countries.



MARKET STRATEGIES

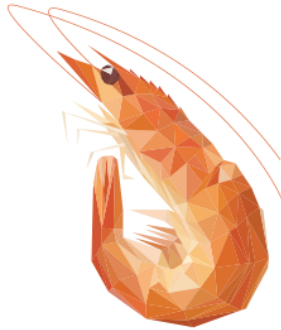
Certifications

90% of production area has state or private certification of good aquaculture practices, accredited to the European Union standards.

Certifications of private agencies in Ecuadorian shrimp industry:



Communication strategy



— ECUADOR —
FIRST CLASS SHRIMP

IN PRODUCTION SINCE 1969
AND STILL GROWING



www.thebestshrimpintheworld.com



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CÁMARA NACIONAL DE
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Sustainable Shrimp Partnership (SSP) is formed by a group of leading companies in the Ecuadorian shrimp sector; which, with the support of **Aquaculture Stewardship Council (ASC)** and **World Wildlife Fund (WWF)** are committed to creating a sustainable future for aquaculture, producing shrimp of premium quality, complying with the highest social and environmental standards, free of antibiotics and in a completely traceable way..

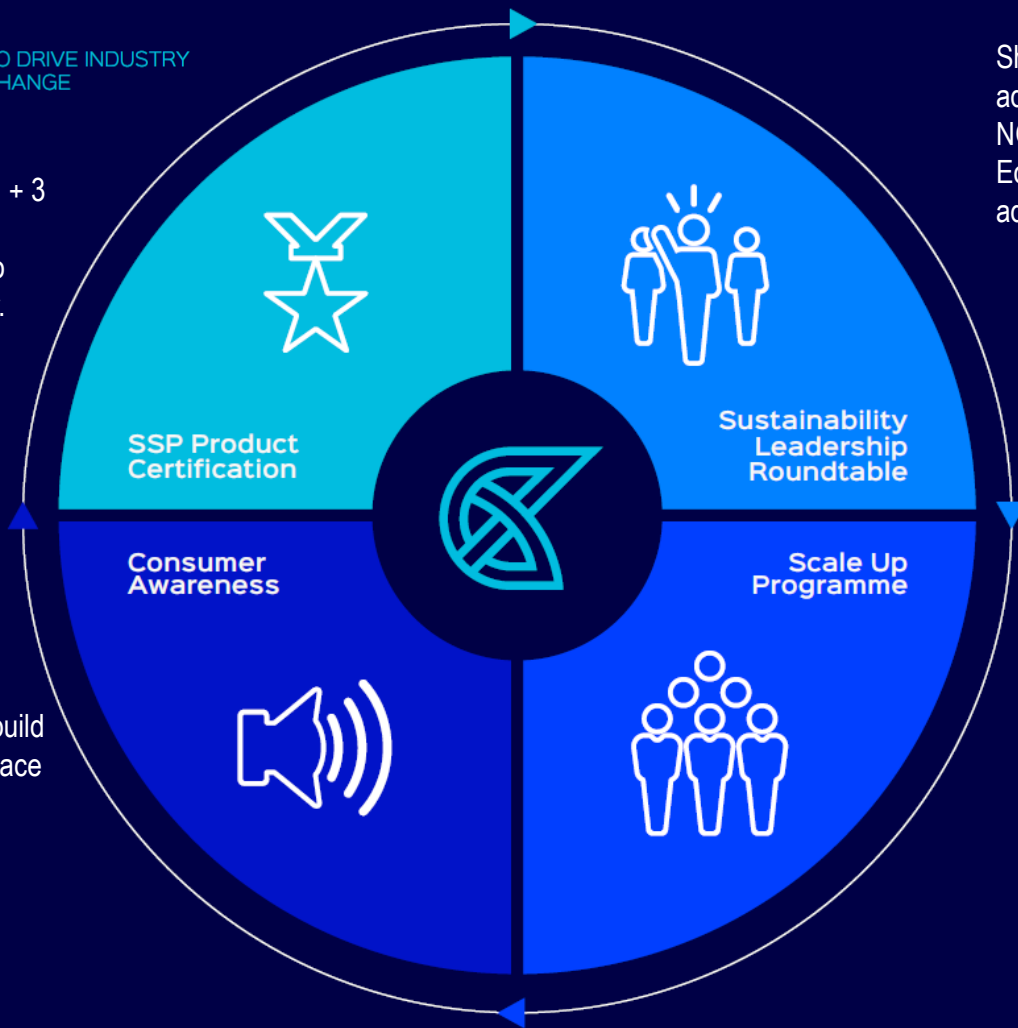
The main SSP objectives are:

- Produce a healthy, nutritious and pure shrimp in a sustainable manner.
- Promote the continuous improvement of shrimp production practices at a social and environmental level.
- Create differentiation in international markets, making the public aware of the best practices of shrimp production and its attributes.

ACTIONS TO DRIVE INDUSTRY CHANGE

Complying ASC standard + 3 additional criteria: zero antibiotics, traceability, no negative impact on water.

Increase awareness and build reputation in the market place for SSP shrimp.



Shape the future of aquaculture with support from NGO's, and build position of Ecuador as global leader in aquaculture sustainability.



Work with small and mid sized farms to help them improve practices and work up to achieving SSP standards, encourage better practices in the aquaculture industry.



**Where is
Ecuador
going?**

- National and international promotional campaigns. Participation in seafood shows and trades.
- Specific certification with the highest standard.
- Technification: use of aerators and automatic feeders. Investment in R&D&I on shrimp nutrition and water/soil quality.
- Environmental sustainability: change of energy source and efficiency.



Thank you

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