a purchase guide
TO THE ECUADORIAN SHRIMP INDUSTRY
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Ecuador’s Shrimp Industry

Ecuador’s shrimp industry is widely recognized for its ability to deliver high-quality Pacific white shrimp (*L. vannamei*), grown in sustainable low-density production systems, through short supply chains to the international market. Its industry, headed by the National Chamber of Aquaculture (CNA), continuously invests in promoting its premium-quality shrimp on the international market. Over the past seven years, Ecuador has tripled its shrimp production. In the coming years, the country is expected to increase its production even further while maintaining the sublime quality of its products. This chapter provides you with a brief overview of Ecuador’s shrimp industry and the most important developments that will set the scene for the years to come.

**Production**

By the end of 2017, Ecuador had a total of only 1,402 registered shrimp farms (compared to, for example, more than 100,000 in India). Geographically, shrimp farming in Ecuador is concentrated in the southern states of El Oro and Guayas. Farms in this area are generally large and directly related to processors in the area. Many leading exporters own farms in these regions or have structural partnerships with independent farms in place. Farms in Manabi and Esmeraldas in the north are generally smaller and related to processors in the north. Farms in the southern provinces are expected to be better able to adopt new technologies compared to farms in the north, because of their size, financial strength and level of professionalism. Therefore, STIP expects the southern provinces to become even more important in the future.

Ecuadorian shrimp farmers are continuously increasing their production volumes. Contrary to most of their Asian counterparts, expansion of farming land only plays a minor role in this endeavor. This increased productivity is mainly driven by the optimization of farming practices. Investments in improved genetics, feed management, water quality management and aeration have enabled farmers to increase stocking densities from 8-10 post-larvae/m² to about 30 post-larvae/m². A fully optimized shrimp pond can now easily double output of more intensive shrimp farms in Asia, which, with a stocking density of 100 post-larvae/m² and 2.5 crops per year, could easily produce 10 tonnes a year.

Table 1 shows the average size of shrimp produced in Ecuador in 2018 as well as the expected development over the coming years. STIP sources in Ecuador expect farmers to aim at producing slightly larger sizes to meet demand from China and other markets. In terms of colour (also shown in Table 1), the main colours of shrimp produced in Ecuador are currently A3 (60%), A2 (25%), and A4 (15%). STIP sources are of the opinion that the optimization of shrimp production will not impact the colours.

**Figure 1: Productivity of Optimized Shrimp Ponds in Ecuador**

![Figure 1: Productivity of Optimized Shrimp Ponds in Ecuador](image)

*Data sampled from 17,500 ha of farms, presented by Rodrigo Laniado, Director of SONGA, during goal 2018 in Guayaquil, Ecuador*

**Figure 2: Area of Land Under Shrimp Culture (Hectares) in 2015**

![Figure 2: Area of Land Under Shrimp Culture (Hectares) in 2015](image)

**Table 1: Sizes and Colours of Shrimp in 2018 vs. 2023**

<table>
<thead>
<tr>
<th>HOSO Sizes Estimation</th>
<th>2018 (%)</th>
<th>2023 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>20 - 30</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>30 - 40</td>
<td>10</td>
<td>15</td>
</tr>
<tr>
<td>40 - 50</td>
<td>32</td>
<td>40</td>
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<tr>
<td>50 - 60</td>
<td>30</td>
<td>30</td>
</tr>
<tr>
<td>60 - 70</td>
<td>20</td>
<td>10</td>
</tr>
<tr>
<td>70 - 80</td>
<td>4</td>
<td>0</td>
</tr>
<tr>
<td>80 - 90</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>90 - 100</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

**Area**

- **Guayas and El Oro**
  - A1: 0%
  - A2: 60%
  - A3: 35%
  - A4: 5%

- **Esmeraldas and Manabi**
  - A1: 0%
  - A2: 20%
  - A3: 65%
  - A4: 15%

Source: STIP Sources in Ecuador

Ecuador’s recent move towards the Chinese market has also had an effect on farming practices, and especially on the sizes of shrimp that Ecuador’s farmers are targeting. Ecuador’s farmers continue to operate relatively extensive production systems. If we divide Ecuador’s production volume by the area under cultivation, average productivity is about 2.5 tonnes per ha per year. Ideally, and if fully optimized, Ecuador’s farmers could reach around 3 tonnes per ha per year. This is still far below the typical output of more intensive shrimp farms in Asia, which, with a stocking density of 100 post-larvae/m² and 2.5 crops per year, could easily produce 10 tonnes a year.

**Table 1: Sizes and Colours of Shrimp in 2018 vs. 2023**

*Source: STIP Sources in Ecuador*

**Figure 2: Area of Land Under Shrimp Culture (Hectares) in 2015**

*Source: Secretaria de Acuacultura, MGAP*
In this chapter, we provide you with an overview of the top 20 shrimp exporters in Ecuador. These companies have all contributed information based on which we were able to verify and complete their company profiles. What is more, they have indicated that they are interested in expanding their market. Next to these 20, we also provide you with information on six other exporters who have shown an interest to us in expanding their market and range of business partners.

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**EMPACADORA DEL PACIFICO - EDPACIF S.A.**

**EST.** 2001 | **EU** 654

**CONTACT PERSON** DENISE VELEZ

**SALES REPRESENTATIVE**

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PEDERNALES, MANABÍ

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**MONTHLY PRODUCTION CAPACITY**

100 CONTAINERS

**TOTAL EXPORT 2013** 10,352 TONNES

**TOTAL EXPORT 2018** 17,596 TONNES

- OWN HATCHERY YES
- OWN FARMS YES

**SOURCING RAW MATERIAL**

12% OWN FARMS/ 30% PARTNERSHIP FARMS / 58% SPOT MARKET

**SUSTAINABILITY CERTIFICATIONS**

NONE

**EXPORT PRODUCTS**

HOSO 67% | HLSO 23% | PEELED 10%

**TYPE OF FREEZING MACHINES AVAILABLE**

BLAST YES | IQF YES

**MAIN EXPORT MARKETS**

CHINA 10% | VIETNAM 20% | US 16%

**QUALITY CERTIFICATION**

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**COFIMAR**

**EST.** 1995 | **EU** 7145

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**MONTHLY PRODUCTION CAPACITY**

80 CONTAINERS

**TOTAL EXPORT 2013** 1,479 TONNES

**TOTAL EXPORT 2018** 16,209 TONNES

- OWN HATCHERY NO
- OWN FARMS YES

**SOURCING RAW MATERIAL**

30% OWN FARMS / 70% PARTNERSHIP FARMS

**SUSTAINABILITY CERTIFICATIONS**

NONE

**EXPORT PRODUCTS**

HOSO 80% | HLSO 10% | PEELED 10%

**TYPE OF FREEZING MACHINES AVAILABLE**

BLAST YES | IQF NO

**MAIN EXPORT MARKETS**

CHINA 60% | US 18% | EUROPE 20% | OTHER 2%

**QUALITY CERTIFICATION**

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The company EDPACIF was created with the vision to meet customer needs while working with the socioeconomic development of the regions of Coaque and Pedernales. The company began exporting in March 2001. The packing plant with a capacity of 100 containers monthly processes shrimp, using appropriate quality control processes and 100% traceability, ensuring the safety of its products, meeting the implicit and explicit requirements of its customers.

As Cofimar, we currently market our products in several countries, and we are achieving our main objective: “To become one of the most successful companies in the shrimp industry”. Our group owns over 2000 hectares of shrimp farms that have been certified by the National Fisheries Institute. These are produced under extensive production practices, thus guaranteeing the quality and reliability of our shrimp from its beginning to the final consumer. COFIMAR is committed to an international expansion program with its own production.