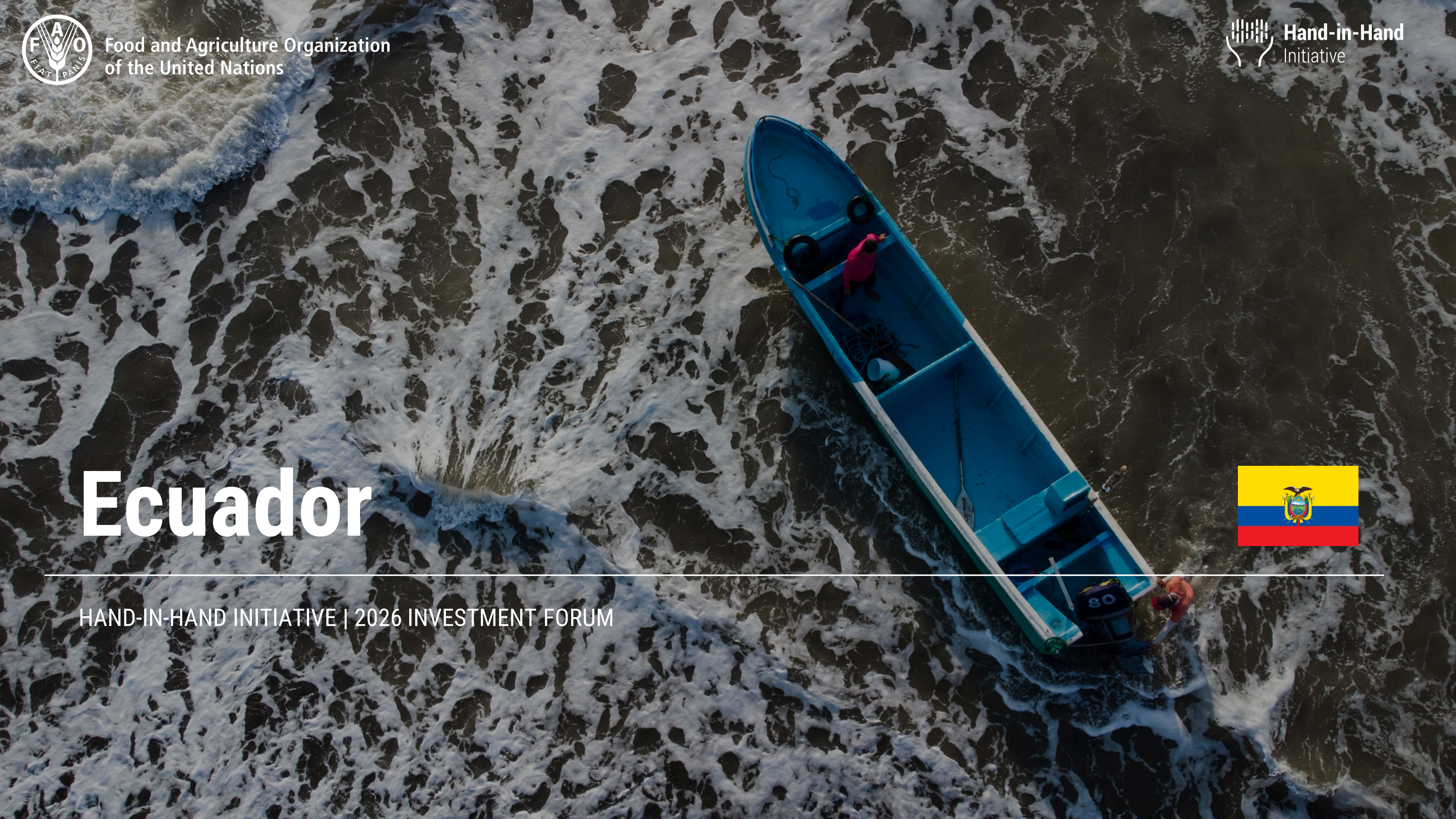
Food and Agriculture Organization of the United Nations

Hand-in-Hand Initiative



Ecuador

HAND-IN-HAND INITIATIVE | 2026 INVESTMENT FORUM

IMPORTANT NOTES

FAO'S HAND-IN-HAND INITIATIVE

The investment opportunities presented in this document derive from government-led investment plans developed under FAO's Hand-in-Hand (HIH) Initiative. The Initiative supports countries in identifying high-impact agrifood system investments through a combination of data-driven territorial analysis, value chain assessments, and close collaboration with national counterparts. Using the Hand-in-Hand Geospatial Platform, the Initiative integrates geospatial, biophysical, and socio-economic data to identify priority "green zones" where agricultural potential and poverty incidence overlap, creating strong opportunities for transformative investment. Based on these analyses, national governments lead the development of investment plans that identify priority value chains, key bottlenecks, and potential investments required to accelerate agrifood system transformation. These investment opportunities aim to raise incomes, improve nutrition, and empower poor and vulnerable populations, while strengthening resilience to climate change and supporting the sustainable management of natural resources. The Initiative focuses on territories where targeted investments can generate the greatest impact in reducing poverty and hunger, contributing to progress towards Sustainable Development Goals SDG1 (No Poverty), SDG2 (Zero Hunger), and SDG10 (Reduced Inequalities), while balancing economic growth, social inclusion, and environmental sustainability.

IMPORTANT CLARIFICATIONS

The opportunities presented in this document are derived from government investment plans and reflect national development priorities identified through the Hand-in-Hand Initiative. FAO provides analytical and technical support in the identification and assessment of these opportunities and facilitates engagement with potential partners. The concepts presented are indicative and require further structuring and discussion with the relevant governments and potential investors. This document therefore presents a pipeline of government-prioritized agrifood investment opportunities that have been pre-screened using FAO's Hand-in-Hand analytical tools. FAO can support interested partners by facilitating technical exchanges and follow-up discussions with relevant government counterparts.

IMPACT TAGS

Investment cases are classified across four impact areas to highlight their primary development contributions and ensure comparability across countries and value chains.

Livelihoods	Income, productivity, jobs, and market access
Gender & Youth	Inclusion and opportunities for women and young people
Planet & Environment	Climate resilience and sustainable resource management
Digital	Use of technology to improve efficiency and access

ECUADOR

A strategic destination for sustainable investment and inclusive development, with growing agrifood opportunities and strong institutional coordination

KEY INVESTMENT SIGNALS

POPULATION

16.9M

(MILLION)

GDP

USD 130.3B

(BILLION)

AGRICULTURAL LAND

4.8M ha

(MILLION HECTARES)

INVESTMENT CASE

STRATEGIC GLOBAL GATEWAY

- Direct Pacific access, 700 miles from the Panama Canal
- Connects North America, Europe, Asia, and South America
- 5 ports, 13 airports, 10,000+ km of roads

STABLE ECONOMIC FOUNDATION

- Dollarized economy with low inflation
- Sound, well-integrated financial system
- Reduced transaction costs for investors

CLEAR INVESTMENT FRAMEWORK

- ICSID member — strong legal certainty
- Tax incentives for strategic investments
- Streamlined regulatory procedures

ECUADOR: INVESTMENT PORTFOLIO

Unlocking productivity and value-added opportunities across cocoa, livestock, and tuna value chains

INVESTMENT PLAN **ECUADOR**	INVESTMENT CASE **1. COCOA PRODUCTION & PROCESSING**	INVESTMENT CASE **2. LIVESTOCK: REGENERATIVE TRANSFORMATION**	INVESTMENT CASE **3. TUNA: BLUE TRANSFORMATION**
IMPACT TAGS	IMPACT TAGS	IMPACT TAGS	IMPACT TAGS
INVESTMENT **USD 166.9 million**	INVESTMENT **USD 83.2 million**	INVESTMENT **USD 71.1 million**	INVESTMENT **USD 12.6 million**
NPV **USD 60.3 million**	NPV **USD 37.8 million**	NPV **USD 20.8 million**	NPV **USD 1.6 million**
AVG IRR **18.5%**	IRR **20.6%**	IRR **20.4%**	IRR **14.4%**
DIRECT BENEFICIARIES **487.1 thousand**	DIRECT BENEFICIARIES **352.0 thousand**	DIRECT BENEFICIARIES **115.1 thousand**	DIRECT BENEFICIARIES **20.0 thousand**
INDIRECT BENEFICIARIES **1.6 million**	INDIRECT BENEFICIARIES **1.2 million**	INDIRECT BENEFICIARIES **384.5 thousand**	INDIRECT BENEFICIARIES **80.0 thousand**
AVG PER CAPITA INCOME INCREASE **N.A.**	AVG PER CAPITA INCOME INCREASE **+USD 2,060 – 2,855 / ha**	AVG PER CAPITA INCOME INCREASE **+USD 362 / cow**	AVG PER CAPITA INCOME INCREASE **N.A.**
GHG IMPACT **-1.1 million tCO2-e**	GHG IMPACT **-229.7 thousand tCO2-e**	GHG IMPACT **-761.6 thousand tCO2-e**	GHG IMPACT **-75.1 thousand tCO2-e**

1. COCOA PRODUCTION & PROCESSING

Hand-in-Hand Initiative

Ecuadorian cocoa for premium markets

INVESTMENT PROFILE (INDICATIVE)

INVESTMENT

USD 83.2M

(MILLION)

NPV

USD 37.8M

(MILLION)

IRR

20.6%

(%)

RATIONALE

- 501,244 MT produced (2025); 9.8% of agricultural GDP (VAB)
- USD 4,183M FOB in exports (13.5% of non-oil exports); 90% raw bean, 10% value-added
- 456,617 people employed across the chain; 232,200 production units (88.1% <5ha)

KEY BOTTLENECKS

PROPOSED INVESTMENTS(*)

1. Limited market intelligence and access to premium markets

Public

Structured access to premium markets & country positioning (USD 3.4 million):
- Market Intelligence & Competitiveness Center
- National/International Positioning & Promotion Strategy

2. Low productivity, limited access to certified genetic material

Private

Resilient agroforestry production & differentiated genetic material (USD 10.3 million):
- Transition of 20,347 ha to agroforestry systems
- Network of certified territorial clonal nurseries/gardens

3. Weak links between research, innovation, and quality

Public Private

Quality, innovation & differentiation (USD 7.8 million):
- Center of Excellence in Cocoa Innovation
- Strengthening of 7 territorial cocoa-quality labs

SUSTAINABILITY BENEFITS

DIRECT BENEFICIARIES

352.0K

(THOUSAND)

INDIRECT BENEFICIARIES

1.2M

(MILLION)

PER CAPITA INCOME INCREASE

+2,458

(USD/HA)

GHG IMPACT

FAO EXACT CARBON TOOL

-229.7K

(THOUSAND tCO_2-e)

Note: (*) Opportunities reflect government priorities identified through the FAO Hand-in-Hand Initiative and require further structuring with relevant public and private stakeholders.

1. COCOA PRODUCTION & PROCESSING (cont'd)

Hand-in-Hand Initiative

Ecuadorian cocoa for premium markets

INVESTMENT PROFILE (INDICATIVE)

INVESTMENT
USD 83.2M
(MILLION)

NPV
USD 37.8M
(MILLION)

IRR
20.6%
(%)

RATIONALE

- 501,244 MT produced (2025); 9.8% of agricultural GDP (VAB)
- USD 4,183M FOB in exports (13.5% of non-oil exports); 90% raw bean, 10% value-added
- 456,617 people employed across the chain; 232,200 production units (88.1% <5ha)

KEY BOTTLENECKS / PROPOSED INVESTMENTS(*)

KEY BOTTLENECKS	PROPOSED INVESTMENTS(*)
4. Insufficient post-harvest/processing infrastructure	Public, Private Modernization of collection, post-harvest & processing infrastructure (USD 3.2 million): • Modernization & accreditation of 7 collection/post-harvest centers • 2 modular semi-finished-cocoa plants for premium markets
5. Heterogeneous technical, sensory, organizational, and commercial capacities	Public Specialized extension, innovation & knowledge management (USD 4.7 million): • National Specialized Cocoa Extension Service (3,647 producers)
6. No interoperable platform integrating georeferencing/traceability/quality data	Public Digital traceability & information management (USD 0.4 million): • Integrated digital traceability & monitoring platform
7. Financing poorly adapted to the production cycle; limited incentives for sustainability services	Public Climate-adapted financing & market incentives (USD 53.4 million): • Differentiated credit line for premium-market Ecuadorian cocoa • Results-based payment model for agroforestry systems, 85,348 ha potential

SUSTAINABILITY BENEFITS

DIRECT BENEFICIARIES
352.0K
(THOUSAND)

INDIRECT BENEFICIARIES
1.2M
(MILLION)

PER CAPITA INCOME INCREASE
+2,458
(USD/HA)

GHG IMPACT
FAO EXACT CARBON TOOL
-229.7K
(THOUSAND tCO2-e)

Note: (*) Opportunities reflect government priorities identified through the FAO Hand-in-Hand Initiative and require further structuring with relevant public and private stakeholders.

2. LIVESTOCK: REGENERATIVE TRANSFORMATION

Hand-in-Hand Initiative

Regenerative transformation of Ecuadorian livestock farming

INVESTMENT PROFILE (INDICATIVE)

INVESTMENT

USD 71.1M

(MILLION)

NPV

USD 20.8M

(MILLION)

IRR

20.4%

(%)

RATIONALE

- 4.7M head of cattle; 73% dual-purpose; 10.35% of agricultural GDP (VAB)
- Meat & dairy chains: USD 2.8B combined production (2024p), 650,000+ jobs
- Consumption well below recommended levels (meat 8kg vs. 26kg; dairy 108 vs. 160 liters/year)
- Sector responsible for 12% of the country's anthropogenic emissions

KEY BOTTLENECKS / PROPOSED INVESTMENTS(*)

KEY BOTTLENECKS	PROPOSED INVESTMENTS(*)
1. No standards/criteria exist for regenerative livestock farming	Public Regenerative livestock farming (USD 0.6 million) • National Strategy & Roadmap for Regenerative Livestock Farming
2. Limited market knowledge/adoption of regenerative practices	Public, Private Structured market access & regenerative commercial positioning (USD 3.3 million): • Market Intelligence, Sanitary Access & Competitiveness Center
3. Limited differentiation/recognition of regenerative products	Public, Private New production systems for climate transition (USD 5.0 million): • Innovation Center for Livestock Transformation • Strengthening of 3 anchor companies for regenerative-origin meat & dairy products

SUSTAINABILITY BENEFITS

DIRECT BENEFICIARIES

115.1K

(THOUSAND)

INDIRECT BENEFICIARIES

384.5K

(THOUSAND)

PER CAPITA INCOME INCREASE

+362

(USD/COW)

GHG IMPACT

FAO EXACT CARBON TOOL

-761.6K

(THOUSAND tCO_2-e)

Note: (*) Opportunities reflect government priorities identified through the FAO Hand-in-Hand Initiative and require further structuring with relevant public and private stakeholders.

Hand-in-Hand Initiative

2. LIVESTOCK: REGENERATIVE TRANSFORMATION (cont'd)

Regenerative transformation of Ecuadorian livestock farming

INVESTMENT PROFILE (INDICATIVE)

INVESTMENT

USD 71.1M
(MILLION)

NPV

USD 20.8M
(MILLION)

IRR

20.4%
(%)

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- Sector responsible for 12% of the country's anthropogenic emissions

KEY BOTTLENECKS	PROPOSED INVESTMENTS(*)
4. Insufficient infrastructure and inconsistent quality standards	**Public** Traceability for differentiation (USD 16.5 million): • Modernization of 15 slaughter facilities + 10 milk collection centers • Herd identification & traceability for regenerative differentiation, 1.6M head
5. Weak traceability and integration of information systems	**Public** Information management for competitiveness (USD 0.4 million): • Integrated platform for information, traceability & livestock competitiveness
6. Financing poorly adapted to the regenerative/climate transition	**Public** Regenerative financial ecosystem (USD 45.3 million): • Differentiated credit line for Regenerative Livestock Transformation • Results-based payment model for regenerative livestock farming, 67,279 ha potential

SUSTAINABILITY BENEFITS

DIRECT BENEFICIARIES
115.1K
(THOUSAND)

INDIRECT BENEFICIARIES
384.5K
(THOUSAND)

PER CAPITA INCOME INCREASE
+362
(USD/COW)

GHG IMPACT
FAO EXACT CARBON TOOL
-761.6K
(THOUSAND tCO2-e)

Note: (*) Opportunities reflect government priorities identified through the FAO Hand-in-Hand Initiative and require further structuring with relevant public and private stakeholders.

3. TUNA: BLUE TRANSFORMATION

Repowering the tuna value chain for a blue transformation

Hand-in-Hand Initiative

INVESTMENT PROFILE (INDICATIVE)

INVESTMENT
USD 12.6M
(MILLION)

NPV
USD 1.6M
(MILLION)

IRR
14.4%
(%)

RATIONALE

- Ecuador: world's 3rd-largest tuna exporter (15.6% share)
- 21.48% contribution to the trade balance; 1.15% of national fisheries GDP
- 81% of exports are canned tuna; 14% loins
- Workforce up 24.7% (women) and 41.1% (men) vs. 2023

KEY BOTTLENECKS | PROPOSED INVESTMENTS(*)

1. Low use of fishery byproducts; weak circular economy

Public | Private

Innovation & blue bioeconomy (USD 4.0 million):
- Innovation & Biotechnology Center for fishery byproduct valorization
- Modernization of the National Fisheries & Aquaculture Information System

2. High dependence on conventional energy; outdated port infrastructure; insufficient port security/logistics

Public | Private

Infrastructure & industrial modernization (USD 3.0 million):
- Renewable energy & efficiency systems for the tuna industry
- Modernization of fishing infrastructure & port capacity
- Strengthening of shipyard capacity in Manta
- Fleet technology renewal for traceability & sustainability

3. Fragmented fisheries data, limited evidence for decision-making

Public | Private

Market access (USD 1.2 million):
- Market Intelligence Center
- Ecuador Tuna Observatory

SUSTAINABILITY BENEFITS

DIRECT BENEFICIARIES
20.0K
(THOUSAND)

INDIRECT BENEFICIARIES
80.0K
(THOUSAND)

PER CAPITA INCOME INCREASE
N.A.
(USD/PERSON)

GHG IMPACT
FAO EXACT CARBON TOOL
-75.1K
(THOUSAND tCO2-e)

Note: (*) Opportunities reflect government priorities identified through the FAO Hand-in-Hand Initiative and require further structuring with relevant public and private stakeholders.

3. TUNA: BLUE TRANSFORMATION (cont'd)

Hand-in-Hand Initiative

Repowering the tuna value chain for a blue transformation

INVESTMENT PROFILE (INDICATIVE)

INVESTMENT
USD 12.6M
(MILLION)

NPV
USD 1.6M
(MILLION)

IRR
14.4%
(%)

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KEY BOTTLENECKS | PROPOSED INVESTMENTS(*)

4. Weak fisheries governance with market impact

Public | Private

Capacity building & territorial development (USD 3.1 million):
- Strengthening of technical/institutional capacities in fisheries sustainability
- Training & extension programs for good fishing practices
- Promotion of marine ecosystem restoration & responsible consumption

5. Weak fisheries governance and control

Public

Governance & reforms (USD 0.8 million):
- Public policy for blue transformation & sustainable fisheries
- Interinstitutional coordination for fisheries governance
- Regulation for traceability & international markets

6. Limited access to financing for sustainable innovation

Public | Private

Financial ecosystem (USD 0.5 million):
- Financial instruments for blue transformation, differentiated credit line
- Blended finance mechanisms to mobilize investment

SUSTAINABILITY BENEFITS

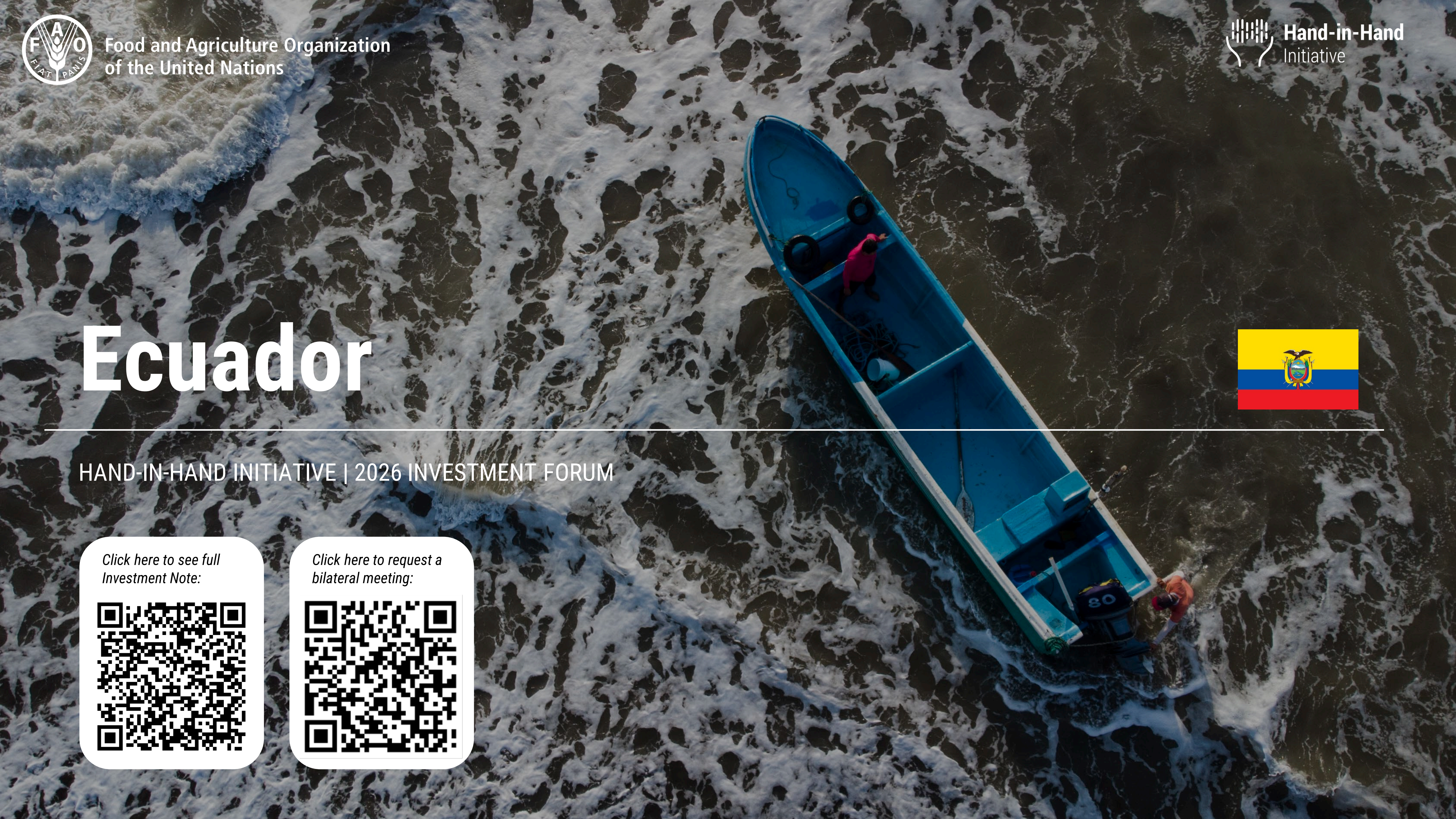
DIRECT BENEFICIARIES
20.0K
(THOUSAND)

INDIRECT BENEFICIARIES
80.0K
(THOUSAND)

PER CAPITA INCOME INCREASE
N.A.
(USD/PERSON)

GHG IMPACT
FAO EXACT CARBON TOOL
-75.1K
(THOUSAND tCO2-e)

Note: (*) Opportunities reflect government priorities identified through the FAO Hand-in-Hand Initiative and require further structuring with relevant public and private stakeholders.



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Click here to see full Investment Note:

Click here to request a bilateral meeting: