SPECIAL REPORT

PARAGUAYAN CONSUMER IMPORT CHOICE FOR TWENTY PRODUCTS FROM FOUR COUNTRIES

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Introduction

Over the past few years, we have published several open access articles featuring Paraguayan consumer behavior with a focus on general attitudes toward imports and imports from specific countries.[1] More specifically, we have studied the propensity, morality, and openness of Paraguayans to choose domestic versus imported goods.

In this study, we preview a set of 20 products that were evaluated by 363 middle- and upper-class Paraguayans in 2022 as to their necessity, importance, and familiarity among Paraguayan consumers (see box outlining survey methodology and respondent demographics). We begin with the introduction of the product set to illustrate the contemporaneity and utilitarian nature of the goods surveyed. The 20 products were selected based upon their incorporation within Paraguayan daily life and discourse and are presented in alphabetical order in Table 1.[2] The list of products including impulse and shopping goods comprises everyday items such as clothes, shoes, cellphones, foods, medicines, and appliances among others. Except for cookies, the other 19 products were deemed necessary among those surveyed (Table 1, column 2).

For our Paraguayan respondents, clothing and medical equipment and medicines were ranked highest in necessity. Other products ranked high in necessity include fresh vegetables and fruits, meats, shoes, refrigerators and washing machines, cellphones and computers, and air conditioners. The last item is less a luxury than a necessity in the formidable Paraguayan heat. Automobiles and cooking oil were also ranked high for necessity. Other necessary products but ranked somewhat lower were soy, televisions and radios, microwave ovens, and motorcycles.

All 20 products in the list were considered to be important to the domestic Paraguayan economy (Table 1, column 3). Of these, meats, fresh vegetables, and medicines were at the top of the list, yet all of the surveyed products, even cookies, were thought to be of relative importance to the Paraguayan economy. The survey respondents were quite familiar with the set of queried products (Table 1, column 4). Only four products ranked familiar rather than very familiar, including medical equipment, radios, soy, and motorcycles. Soy was included in the list of goods as this is a major Paraguayan agricultural product that receives much discussion and national policy focus.

1 See the references at the end of this essay for a listing to these studies.

2 This list builds upon the work of Sharma, Shimp, and Shin (1995) who considered 10 products in the daily life of South Koreans.

Table 1
Products and Paraguayan Product Opinion (5-point scale)

Product	Necessary for Living*	Relative Importance in the Domestic Economy#	Product Familiar to You+
	Ave. Response	Ave. Response	Ave. Response
Air conditioner	1.76	1.91	1.15
Automobile	2.01	1.91	1.21
Cellphone	1.73	1.75	1.18
Clothing	1.44	1.77	1.19
Computer/notebook	1.90	2.08	1.27
Cookies	3.04	2.98	1.82
Cooking oil	2.04	2.05	1.49
Fresh fruits	1.69	1.82	1.30
Fresh vegetables	1.54	1.68	1.21
Meat	1.69	1.48	1.21
Medical equipment	1.43	1.87	2.02
Prescription and Over the Counter Medicine	1.49	1.72	1.69
Microwave oven	2.61	2.63	1.54
Motorcycle	2.91	2.59	2.66
Radio	2.96	2.96	2.17
Refrigerator	1.64	1.90	1.32
Shoes	1.63	1.99	1.28
Soy	2.50	2.12	2.32
Television	2.56	2.42	1.47
Washing machine	1.99	2.14	1.34
N	359	360	363

Notes:
* 1= Definitely necessary, 2= Necessary, 3= Neither necessary nor unnecessary, 4= Unnecessary, 5= Definitely unnecessar
# 1= Very important, 2= Important, 3= Neither important nor unimportant, 4= Unimportant, 5= Very unimportant
+ 1= Very familiar, 2= Somewhat familiar, 3= Neither familiar nor unfamiliar, 4= Somewhat unfamiliar, 5= Very unfamiliar

Source: Authors' compilation of 2022 consumer preference survey.

Survey Procedure & Respondent Demographic Overview

From March through July of 2022, 363 middle- and upper-class Paraguayan consumers were surveyed through a purposive snowball sampling procedure. Recruitment of survey respondents was facilitated by several Paraguayan institutions of higher education with graduate programs, alumni groups, and organizations. The targeted respondent group was working professionals to reflect a mature and financially secure and resourced urban consumer with previous contact with imported products. The survey was administered in person and online using an online platform to record responses. The survey instrument included product choice by country of origin, several psychometric scales, and demographic information among others. A small pilot test in early 2022 permitted minor adjustments for wording clarification. The survey generally took about 20-25 minutes to complete.

The average age of the respondents was 32.4 years with a gender breakdown of 43.2% male and 56.8% female. As most respondents were drawn from graduate university study environments, the average years of education was 18.6. Correspondingly, 33.2% of respondents' lived-in middle-class households and 66.8% lived in upper-class households. Nearly all respondents resided in the metropolitan capital area.

This brief overview of Paraguayan consumer views of the necessity, importance, and familiarity of these 20 products provides a foundation in which to consider the import preference of this product set. Table 2 ranks the product set in accordance with which goods as definitely should be imported, should be imported, should not be imported, and definitely should not be imported. Four products were ranked as should definitely be imported, these were cellphones, computers, medical equipment, and automobiles. Ten more products ranked among those that should be imported, including appliances (i.e., washing machines, refrigerators, air conditioners, microwave ovens), televisions and radios, medicines, clothing, shoes, and motorcycles. Four products were identified as should not be imported, including cookies, cooking oil, and fresh fruits and vegetables. Soy and meat were the two products that the respondents acknowledged should definitely not be imported.

Table 2
Should Product be Imported into Paraguay? (5-point scale)

Product	Should be Imported^	
	Ave. Response	Yes or No
Cellphone	4.32	Yes, definitely
Computer/notebook	4.31	Yes, definitely
Medical equipment	4.26	Yes, definitely
Automobile	4.20	Yes, definitely
Television	3.93	Yes
Washing machine	3.81	Yes
Refrigerator	3.78	Yes
Air conditioner	3.73	Yes
Microwave oven	3.72	Yes
Prescription and Over the Counter Medicine	3.67	Yes
Radio	3.48	Yes
Motorcycle	3.30	Yes
Clothing	3.19	Yes
Shoes	3.17	Yes
Cookies	2.75	No
Cooking oil	2.61	No
Fresh fruits	2.36	No
Fresh vegetables	2.18	No
Soy	1.95	No, definitely not
Meat	1.93	No, definitely not
N	361	

Notes:
^ 1= Definitely should not import, 2= Should not import, 3= Neutral, 4= Should import, 5= Definitely should import

Source: Authors' compilation of 2022 consumer preference survey.

The historical record of the importation of these 20 products into Paraguay over the preceding ten years prior to our consumer survey year of 2022 reveals that each of the products were imported (see Table 3). The highest value imports were cellphones, automobiles, medicines, computers, and clothing, all exceeding $100 million US dollars in average yearly imports. Microwave ovens, meats, and soy represent the products with the smallest annual average import values.

Table 3
Average Yearly Import Value of 20 Products into Paraguay, 2012-2021

Product	Ave. Yearly Import Value (in millions of $US)
Air conditioner	65.9
Automobile	497.0
Cellphone	674.3
Clothing	115.6
Computer/notebook	142.7
Cookies	31.5
Cooking oil	13.5
Fresh fruits	14.2
Fresh vegetables	19.1
Meat	7.6
Medical equipment	37.2
Prescription/OTC Medicine	236.3
Microwave oven	3.6
Motorcycle	89.7
Radio	54.3
Refrigerator	80.4
Shoes	97.1
Soy	10.0
Television	75.6
Washing machine	29.7
Total	**2,295.3**

Source: Banco Central de Paraguay.

Import Origins

The primary focus of this study is on the choice of four import partners for the set of 20 products identified above. The four countries selected are Paraguay's four most important national import sources. These include Argentina and Brazil, Paraguay's neighbors and MERCOSUR partners. Also included are China and the United States, global economic superpowers with deep and growing connections to Paraguay (Pisani & Masi, 2022). Table 4 provides an overview of the import origin of the 20 selected products over the preceding ten years from 2022. The grey shaded cells of the table visually indicate the leading national import source by product.

In all, the four countries represent the number one import origin of seventeen of the 20 products. Argentina is the most important import source for cooking oil, fresh fruits and vegetables, and soy. Brazil is the most important foreign supplier of cookies, meats, refrigerators, washing machines, and shoes. China is the most important source for imported air conditioners, cellphones and computers, clothing, radios and televisions, microwave ovens, and motorcycles. The remainder of the countries outside the focused four nations are the most important sources of automobiles, medicines and medical equipment. The United States is not a leading country of origin for any of the 20 products.

Table 4
Average Paraguay Import Share by Value for 20 Products from Argentina, Brazil, China, the United States, and the Rest of the World 2012-2021

Product	Argentina %	Brazil %	China %	USA %	ROW^ %
Air conditioner	0.0	0.0	82.8	0.3	16.9
Automobile	3.1	13.2	3.5	6.5	73.8
Cellphone	0.0	0.1	90.1	2.8	7.0
Clothing	2.6	26.7	50.8	1.9	18.0
Computer/notebook	0.0	0.0	91.8	5.4	2.8
Cookies	31.9	49.8	0.2	0.1	18.1
Cooking oil	86.7	0.6	0.0	0.0	12.7
Fresh fruits	69.1	17.8	0.0	0.2	12.9
Fresh vegetables	46.1	27.3	21.1	0.1	5.5
Meat	2.3	75.2	0.0	0.0	22.5
Medical equipment	5.4	9.4	23.6	20.1	41.4
Prescription/OTC Medicine	20.0	10.8	1.8	9.4	57.9
Microwave oven	0.0	0.4	92.0	0.6	7.0
Motorcycle	0.1	0.6	88.0	1.5	9.8
Radio	0.0	0.1	84.5	0.7	14.7
Refrigerator	10.7	36.9	30.1	1.4	20.8
Shoes	1.5	49.8	33.0	0.6	15.1
Soy	48.7	39.1	0.0	0.0	12.2
Television	0.0	0.1	67.8	1.3	30.8
Washing machine	10.5	36.0	31.8	2.1	19.6

Notes:
^ ROW = Rest of the World.

Source: Banco Central de Paraguay.

Yet when asked about where each of the 20 products should be imported from, the United States was the overwhelming choice for 14 products among respondents. Argentina held first position for five products related to food and Brazil for one product, soy (see Table 5, highlighted grey cells). There is a clear disconnect between actual import performance and the stated choice of American imports. Each of the four import countries is further detailed below.

Table 5
Paraguayan Opinion: Should Products be Imported from Four Select Countries

Product	Argentina	Brazil	China	USA
	Ave. Response^	Ave. Response	Ave. Response	Ave. Response
Air conditioner	2.69	2.97	3.36	3.66
Automobile	2.97	3.38	3.18	3.85
Cellphone	2.58	2.79	3.57	3.95
Clothing	3.37	3.44	2.91	3.71
Computer/notebook	2.62	2.90	3.57	3.98
Cookies	3.23	2.94	2.19	2.77
Cooking oil	3.04	2.72	2.07	2.38
Fresh fruits	2.73	2.61	1.94	2.12
Fresh vegetables	2.63	2.54	1.93	2.09
Meat	2.25	2.20	1.83	1.97
Medical equipment	3.23	3.38	3.34	3.99
Prescription and Over the Counter Medicine	3.30	3.33	2.87	3.82
Microwave oven	2.82	2.88	3.34	3.51
Motorcycle	2.64	2.83	3.04	3.30
Radio	2.64	2.80	3.16	3.33
Refrigerator	2.80	2.99	3.32	3.50
Shoes	3.23	3.34	2.75	3.50
Soy	2.19	2.26	2.00	2.09
Television	2.81	2.88	3.39	3.57
Washing machine	2.85	2.94	3.31	3.52
N	353	352	350	357

Notes:
^ 1= Definitely should not import, 2= Should not import, 3= Neutral, 4= Should import, 5= Definitely should import, based upon a 5-point scale.

Source: Authors' compilation of 2022 consumer preference survey.

Argentina

Respondent import choice for Argentina appears in Table 6. Column two restates whether or not, in general, the product should be imported as previously shown in Table 2. Column 3 specifies whether the product should be imported from Argentina. Column 4 considers the previous responses in columns two and three and suggests a likely opportunity import outcome for each product: yes (green color), no (red color), or possibly (yellow color).

Of the product set, four Argentine products are best positioned for import into Paraguay: clothing, medical equipment, medicines, and shoes. Together, these products represent about $486 million in annual imports, a good position for Argentine businesses. Yet, Argentina underperforms in each of these goods in relation to surveyed consumer sentiment, though Argentina represents the second largest source of imported medicines into Paraguay. More modest as far as annual imports, cookies and cooking oil add another $45 million dollar market. While listed as possible market outcomes, Argentina already leads in cooking oil exports to Paraguay and is the number two exporter of cookies into Paraguay.

Table 6
20 Products and Paraguayan Product Opinion vis-à-vis Argentina

Product	Should be Imported? (2)	Should Product be Imported from Argentina? (3)	Likely Import Opportunity for Argentine Product? (4)
Air conditioner	Yes	No	No
Automobile	Yes	No	No
Cellphone	Yes	No	No
Clothing	Yes	Yes	Yes
Computer/notebook	Yes	No	No
Cookies	No	Yes	Possibly
Cooking oil	No	Yes	Possibly
Fresh fruits	No	No	No
Fresh vegetables	No	No	No
Meat	No	No	No
Medical equipment	Yes	Yes	Yes
Prescription and Over the Counter Medicine	Yes	Yes	Yes
Microwave oven	Yes	No	No
Motorcycle	Yes	No	No
Radio	Yes	No	No
Refrigerator	Yes	No	No

Product	Should be Imported? (2)	Should Product be Imported from Argentina? (3)	Likely Import Opportunity for Argentine Product? (4)
Shoes	Yes	Yes	Yes
Soy	No	No	No
Television	Yes	No	No
Washing machine	Yes	No	No

Notes:
1) These questions were asked using 5-point Likert scales, with 3 as the center point;
2) The scales for columns 1-3 were bifurcated into "Yes" and "No" answers at the mid-point mean;
3) Keys for columns 2 & 3: 1= Definitively should not be imported; 2= should not be imported; 3= neutral; 4= should be imported, 5= definitively should be imported

Source: Authors' calculations utilizing a product perception scale adapted from Sharma, Shimp, and Shin (1995).

Brazil

Respondent import choice for Brazil appears in Table 7 and follows the same pattern as in Table 6 (and the above discussion of Argentina). Column two restates whether or not, in general, the product should be imported as previously shown in Table 2. Column 3 specifies whether the product should be imported from Brazil. Column 4 considers the previous responses in columns two and three and suggests a likely opportunity import outcome for each product: yes, no, or possibly.

Of the product set, five Brazilian products are best positioned for import into Paraguay: automobiles, cellphones, medical equipment, medicines, and shoes. The last four items mirror those from Argentina with automobiles being the new entrant on this list adding a $497 million annual market (or nearly $1 billion for all give goods). Only in shoes does Brazil perform as expected with about half of the export market to Paraguay given these consumer opinion results. In these other products, Brazil has much room for improvement, however, of the four countries in this study, Brazil has the largest share of the automobile import market in Paraguay.

Table 7
20 Products and Paraguayan Product Opinion vis-à-vis Brazil

Product	Should be Imported? (2)	Should Product be Imported from Brazil? (3)	Likely Import Opportunity for Brazilian Product? (4)
Air conditioner	Yes	No	No
Automobile	Yes	Yes	Yes
Cellphone	Yes	No	No
Clothing	Yes	Yes	Yes
Computer/notebook	Yes	No	No

Product	Should be Imported? (2)	Should Product be Imported from Brazil? (3)	Likely Import Opportunity for Brazilian Product? (4)
Cookies	No	No	No
Cooking oil	No	No	No
Fresh fruits	No	No	No
Fresh vegetables	No	No	No
Meat	No	No	No
Medical equipment	Yes	Yes	Yes
Prescription and Over the Counter Medicine	Yes	Yes	Yes
Microwave oven	Yes	No	No
Motorcycle	Yes	No	No
Radio	Yes	No	No
Refrigerator	Yes	No	No
Shoes	Yes	Yes	Yes
Soy	No	No	No
Television	Yes	No	No
Washing machine	Yes	No	No

Notes:
1) These questions were asked using 5-point Likert scales, with 3 as the center point;
2) The scales for columns 1-3 were bifurcated into "Yes" and "No" answers at the mid-point mean;
3) Keys for columns 2 & 3: 1= Definitively should not be imported; 2= should not be imported; 3= neutral; 4= should be imported, 5= definitively should be imported

Source: Authors' calculations utilizing a product perception scale adapted from Sharma, Shimp, and Shin (1995).

China

China is the current source of a plurality of Paraguay's imported goods. It is no surprise that 11 of the 20 products surveyed not only pertain to China, but also are preferred to come from China (see Table 8). These goods include home appliances (air conditioners, microwave ovens, refrigerators, televisions, washing machines), personal technology (cellphones and computers), transportation (automobiles and motorcycles), and other goods (medical equipment and radios). These manufactured goods represent $1.75 billion in annual value where China leads in market share for all but two of the products (i.e., automobiles and washing machines) fulfilling most of its market opportunities.

Table 8
20 Products and Paraguayan Product Opinion vis-à-vis China

Product	Should be Imported? (2)	Should Product be Imported from China? (3)	Likely Import Opportunity for Chinese Product? (4)
Air conditioner	Yes	Yes	Yes
Automobile	Yes	Yes	Yes
Cellphone	Yes	Yes	Yes
Clothing	Yes	No	No
Computer/notebook	Yes	Yes	Yes
Cookies	No	No	No
Cooking oil	No	No	No
Fresh fruits	No	No	No
Fresh vegetables	No	No	No
Meat	No	No	No
Medical equipment	Yes	Yes	Yes
Prescription and Over the Counter Medicine	Yes	No	No
Microwave oven	Yes	Yes	Yes
Motorcycle	Yes	Yes	Yes
Radio	Yes	Yes	Yes
Refrigerator	Yes	Yes	Yes
Shoes	Yes	No	No
Soy	No	No	No
Television	Yes	Yes	Yes
Washing machine	Yes	Yes	Yes

Notes:
1) These questions were asked using 5-point Likert scales, with 3 as the center point;
2) The scales for columns 1-3 were bifurcated into ''Yes'' and ''No'' answers at the mid-point mean;
3) Keys for columns 2 & 3: 1= Definitively should not be imported; 2= should not be imported; 3= neutral; 4= should be imported, 5= definitively should be imported

Source: Authors' calculations utilizing a product perception scale adapted from Sharma, Shimp, and Shin (1995).

////// United States

The United States does not lead in any category of the 20 products selected for study. Imports from the US in medical equipment ranks in third place behind the world at large and China,

making this product the best performer for the US. Yet, those surveyed indicated a preference for US goods for 14 of the 20 products (see Table 9). Only the foods (cookies, cooking oil, fruits and vegetables, meats, and soy) were preferred not to be imported from the US. Correspondingly, the US overwhelmingly underperforms in the Paraguayan marketplace.

Table 9
20 Products and Paraguayan Product Opinion vis-à-vis USA

Product	Should be Imported? (2)	Should Product be Imported from the USA? (3)	Should be Imported > Should be Imported from the USA? (4)
Air conditioner	Yes	Yes	Yes
Automobile	Yes	Yes	Yes
Cellphone	Yes	Yes	Yes
Clothing	Yes	Yes	Yes
Computer/notebook	Yes	Yes	Yes
Cookies	No	No	No
Cooking oil	No	No	No
Fresh fruits	No	No	No
Fresh vegetables	No	No	No
Meat	No	No	No
Medical equipment	Yes	Yes	Yes
Prescription and Over the Counter Medicine	Yes	Yes	Yes
Microwave oven	Yes	Yes	Yes
Motorcycle	Yes	Yes	Yes
Radio	Yes	Yes	Yes
Refrigerator	Yes	Yes	Yes
Shoes	Yes	Yes	Yes
Soy	No	No	No
Television	Yes	Yes	Yes
Washing machine	Yes	Yes	Yes

Notes:
1) These questions were asked using 5-point Likert scales, with 3 as the center point;
2) The scales for columns 1-3 were bifurcated into "Yes" and "No" answers at the mid-point mean;
3) Keys for columns 2 & 3: 1= Definitively should not be imported; 2= should not be imported; 3= neutral; 4= should be imported, 5= definitively should be imported

Source: Authors' calculations utilizing a product perception scale adapted from Sharma, Shimp, and Shin (1995).

////// Discussion of Findings

Paraguay, as a middle-income country, possesses an open economy to international trade (Mandl, 2021). In 2022, exports and imports were equal in value to 61% of Paraguayan national gross domestic product (World Bank Indicators, 2025). Hence, it is no secret that Paraguayans are generally very open to imported goods (Pisani, Caceres Zarate, Bubak, Tello, & Becker, 2024) and in many cases prefer foreign over domestic products (Pisani, Caceres Zarate, Tello, & Becker, 2023). Concomitantly, the import preference for each of the 20 products was positively associated with lower consumer ethnocentrism feelings.[3] Yet, our sample of middle- and upper-class Paraguayans only broadly represents 27.5% of Paraguayan households by income.[4] This relatively small consumer segment contrasts with 72.5% of the Paraguayan households classified as poor and vulnerable (i.e., the lower classes) (Galeano et al., 2021).

Paraguayans rank the quality of Chinese goods very low (LAPOP, 2025) and US goods very high (Pisani, Cáceres-Zarate, Tello, & Becker, 2024). Our survey respondents of middle- and upper-class Paraguayan consumers had a clear preference for US and Chinese made goods with a slight advantage for US goods. Even Argentine and Brazilian goods fare reputationally better than Chinese goods (Pisani, Caceres Zarate, Tello, & Becker, 2023). This is seemingly good news for producers in Argentina, Brazil, and the US.

However, trade data focused on imports from China clearly indicates that preferences are subject to price considerations and price sensitivity, perhaps more so than to quality and reputational considerations. Clearly, the beneficiaries of lower cost mass production accrue to Argentina, Brazil, and especially China. Of note, US imports falter in Paraguay. Conceivably, the small size of the Paraguayan market in both terms of population and purchasing power is not enticing enough for many US goods makers contained in our product set. The export picture, from our focus on 20 imported goods into Paraguay, appears bright for Argentina, Brazil, and China. The opposite may be true for US producers.

3 This result is statistically significant (ANOVA) at $p = .001$ for each product indicating a lower moral bound for imported goods.

4 Galeano et al. (2021) find that 26.2% of Paraguayan households are middle class, another 1.3% constitute the upper class. Those households earning less than $10 were not considered middle or upper class.

/// Conclusion

We highlight Paraguayan consumer choice among a set of 20 mostly everyday products from the four countries of Argentina, Brazil, China, and the United States. These four countries send the most goods to Paraguay. The 20 products under study—clothes, shoes, cellphones, foods, medicines, and appliances among others—have an annual import value of $2.3 billion US dollars. Our survey of 363 middle- and upper-class Paraguayans reflects the importance, necessity, and familiarity of these goods alongside the imperative of whether or not these goods should be imported.

Products unrelated to food were thought to be appropriately imported. Food products on the other hand were not. Paraguayans are justifiably proud of their productive prowess in producing foodstuffs, a comparative advantage dating back centuries. Choice of nonfood products is a more open consideration among Paraguayan consumers. Each of the four countries of Argentina, Brazil, China, and the US has opportunities to satisfy Paraguayan consumer wants.

However, the Paraguayan consumer wants do not equally reflect the purchasing ability whereby China outperforms others in the Paraguayan marketplace even though its products are considered qualitatively inferior. Where wants are highest—for US goods—demand is largely absent suggesting price as a critical product attribute in Paraguayan consumer decision making related to product need. Left for Argentina and Brazil is much of the middle ground of Paraguayan consumer choice.

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35 años

Centro de Análisis y Difusión
de la Economía Paraguaya