MARKET-INTELLIGENCE BRIEF · ELECTRONIC MONITORING & ONBOARD AI

THE SOUTH PACIFIC TUNA ELECTRONIC MONITORING BRIEF

The 2027 monitoring window in Ecuador's tuna fleet — and how EM providers enter the room where it's decided.

1 The window is open now

Ecuador is the world's second-largest tuna harvester and operates the largest industrial fleet in the Eastern Pacific: **161 vessels**, concentrated in one port. Its monitoring coverage does not match its size — large purse seiners carry full observer coverage, longliners sit near 5–7%, and smaller purse seiners carry none at all. That gap is now closing on a fixed timeline: not by one rule, but by **three separate clocks that all expire in 2027**.

WHY NOW

- **Buyers.** The Tuna Transparency Pledge — Walmart, Thai Union, Carrefour, Albertsons, Aramark — targets 100% on-the-water monitoring, human or electronic, by 2027.
- **Regulator.** IATTC reviews Resolution C-24-09 in 2027 and will weigh EM as a substitute for human observers; the text says a mandatory programme is expected.
- **Trade.** Since 1 January 2026 one of Ecuador's tuna export fisheries is barred from the U.S. market under the MMPA. Reapplication is open — and runs on verifiable evidence.

The hardest clock is not the regulator; it is the buyer. A resolution can be postponed, a purchase order cannot — and Walmart has already told its tuna suppliers to source only from vessels with 100% monitoring by 2027. Which is why systems are being specified *now*, twelve to eighteen months ahead of any published rule.

The buyers are unusually concentrated: the owners of more than 95% of national tuna production. Win the right handful of relationships and you've effectively covered the market.

2 This is a decision system, not a sales market

In the South Pacific tuna cluster, adoption doesn't move like a normal sales market. It moves like a **decision system** organized around four forces: continuity, compliance, risk, and trust.

For electronic monitoring you are invited in through the **compliance door** — the buyer's requirement, the audit, the export licence — but you are approved or rejected at the **continuity door**. The questions that decide an EM deal here are rarely about detection accuracy: does it survive 60–90 days at sea with no technician aboard, does it cost a single set, who reviews the footage and where does that data live.

And no single champion is enough: the deal lives or dies with the risk-owner — the person who has to sign that it is safe.

Problem-owner	Risk-owner	Accountability-owner
Feels the pain, wants the change	Must approve it's safe — protects the company	Owns budget, permission and the next step

If your story only helps the first, it usually stalls at the second. The pilot-readiness system that turns a good meeting into an approved pilot is what we walk through on the Fit Call.

3 The room where it's decided

Expopesca del Pacífico Sur is Ecuador's benchmark industrial fishing expo, produced by Xpocorp across **27 years and 15 editions**. Blue Innovation Hub LATAM operates inside it as the innovation engine — so you enter with instant legitimacy and direct access to decision-makers, not cold outreach from zero.

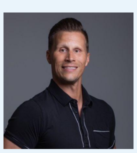
XV Edition · May 12–14, 2027 · Centro de Convenciones del Pacífico – ULEAM · Manta, Ecuador

2,800+ Attendees at the 2026 industrial expo	**10** Top-tuna general managers in curated 1-on-1 meetings	**>95%** Of national tuna production represented	**25** Countries represented

Curated 1-on-1 rounds — matched by strategic fit, briefed in advance. They arrive to buy, not to browse.

The Blue Summit — where industry, innovation and institutions convene in Manta.

> *“BIH LATAM have direct links to key individuals across the entire fleet, and maintains strong relationships that are very helpful to anyone looking to explore opportunities in the tuna industry. Prior to working with them we had no connections or familiarity with the Ecuador tuna fleet; it would have been difficult to build those relationships without their support.”*
>
> **Fraser Stobie** · Business Development, Teem Fish · Electronic Monitoring, Canada



> *“For an innovation company, it cuts months — even years — of commercial work and validation. Direct access to relevant players, an understanding of the business context, and real opportunities to collaborate. We advanced conversations toward pilots and visited facilities.”*
>
> **Jason Hendsch** · Sales Director, Trace Register · Traceability, USA

> *“For the first time in history, all the magnates of the Ecuadorian tuna industry were in one place. It had never happened before.”*
>
> **Julio Tigua · General Manager, Envasur**

4 What to read before we meet: the compliance map for electronic monitoring in Ecuador

ON PROCUREMENT NOTICES

There is no public tender for electronic monitoring in Ecuador, and there is unlikely to be one. The fleet is privately owned. EM will be bought vessel by vessel and group by group, by roughly ten companies that control more than 95% of national production, under commercial pressure from their own buyers and ahead of the regulation. **There is no bid list to get onto. There is a room to get into — and it convenes once a year, in Manta.**

INSTRUMENT / SOURCE	WHY IT MATTERS TO YOU
IATTC Resolution C-24-09 — Interim Minimum Standards for the Use of EMS in IATTC Fisheries (adopted September 2024)	The technical bar your system will be measured against in the Eastern Pacific. Scheduled for review in 2027, when the Commission will consider allowing EM to substitute for human observers. The text states that a mandatory EM programme for EPO tuna fisheries is expected in the near future.
IATTC Ad Hoc Working Group on Electronic Monitoring — WGEM-03 report (Panama, August 2025); WGEM-04 on the 2026 calendar	Where the mandatory programme is actually being drafted. The August 2025 report records that Ecuador and Costa Rica were reviewing pilot data for submission to the IATTC, and that EM cost currently sits above human observers — the objection you will meet in the room.
IATTC 103rd Meeting outcomes (Panama, September 2025)	Proposals to raise longline observer coverage (7% to 15% by 2030) were blocked, and no new requirements were adopted for small purse seiners. The coverage gap that EM is expected to fill got wider, not narrower — which is why the buyer-side pressure is doing the work.
Acuerdo Nro. MAGP-SRP-2026-0001-A — Registro Oficial No. 219, 5 February 2026	Ecuador's annual national transposition of IATTC management measures, issued by the Subsecretaría de Recursos Pesqueros. This is the instrument through which an EM obligation will land in Ecuador. Worth tracking every January–February.
NOAA / NMFS — MMPA import provisions, 90 Fed. Reg. 42,395 (2 September 2025); in force 1 January 2026	Ecuador was denied a comparability finding for a subset of its fisheries, including an export fishery covering yellowfin, bigeye and skipjack tuna, swordfish and dolphinfish taken with surface gillnets. Reapplication has been open since 1 January 2026 — and reapplication runs on verifiable at-sea evidence.
The Nature Conservancy — Tuna Transparency Pledge (launched April 2024)	The commercial deadline: 100% on-the-water monitoring by 2027. Signatories include Walmart, Thai Union, Carrefour, Albertsons, Aramark, AGAC and six governments. This is the clock the fleet's customers are actually running.
Existing Ecuadorian infrastructure — Centro de Monitoreo Satelital (24/7 VMS across the industrial fleet) and the national onboard observer programme	The plumbing already exists and is staffed. EM is a layer added to a working system, not a system built from zero — a materially easier internal argument than the one you fight in most emerging markets.
Precedent already on the water — IATTC's purse-seine EM pilot in Ecuador (cameras on four vessels) and the industry-driven EM pilot on Ecuador's industrial longline fleet, run with Zunibal and WWF Ecuador	Ecuador has piloted EM more than once. What it has never done is scale it. Whoever is in the room when that decision is made will shape the specification the rest of the fleet buys against.

Prepared by Blue Innovation Hub LATAM from public sources: IATTC resolutions and working-group reports; Ecuador's Registro Oficial; NOAA Fisheries MMPA import provisions; The Nature Conservancy. Nothing here is legal advice — it is the working map we use to brief innovation partners before they enter the market.

5 How you enter

The path in is the **Blue Soft Landing Method™** — a curated process that takes you from strategic fit to briefed, one-on-one meetings with the exact decision-makers who must comply, each starting with a clear pilot pathway. Access is **curated by category and limited each edition**, which is why a short fit conversation comes first.

Electronic monitoring is one of eight innovation lines, and the line is capped. Three places for 2027 are already held by returning partners — TeemFish, Integrated Monitoring and Flywire Cameras — each in a different sub-category. Curation is by sub-category, which is precisely what the fit conversation resolves.

Convene (Expo) → **Accelerate** (curated 1:1) → **Prescribe** (Innovation as a Service) → **Continue** (Blue Hub 365)

The 15-minute Fit Call

A realistic go / no-go on fit for 2027 — and where we share the full South Pacific Tuna Market Entry Kit™, the complete decision-motion playbook.

Book: bihlatam.com/fit-call

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Your technology already works. What's missing is the right access.

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