

THE SOUTH PACIFIC TUNA FUEL EFFICIENCY BRIEF

The 2027 fuel window in Ecuador's tuna fleet — and how efficiency and repower 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 industrial vessels**, more than 115 of them large-volume purse seiners, concentrated in one port. In June 2025 that fleet lost the diesel subsidy it had held for half a century. It has not come back — and the state has now said in writing that it will not.

The arithmetic is public. In the May–June 2026 pricing period, Petroecuador's terminal price for **Diesel 2 Atunero was \$4.32 a gallon and Diesel Premium Atunero \$5.41**. Subsidised road diesel that same month was \$3.10. The fleet behind Ecuador's largest non-oil export now buys fuel at a premium to what a truck pays at the pump. The Cámara Nacional de Pesquería puts the move at roughly \$2.75 to \$4.75 a gallon inside a single year — about **\$9 million a month** in additional cost to the sector, on annual consumption of some 54 million gallons.

WHY NOW

- **Price.** The subsidy is gone. The relief decree signed in May 2026 is capped at \$10.5 million, reimbursed after purchase, and described by the state itself as extraordinary, temporary and granted on a single occasion.
- **Fleet.** An estimated **70–80% of the fleet needs modernisation**. Many hulls are over 40 years old, and much of the fleet still runs propulsion and control technology from 15–20 years ago.
- **Money.** A **\$42 million credit line** at Banco del Pacífico — 6% annual, with up to 75% of the credit risk covered by the CFN guarantee fund — was created expressly for fleet renewal, efficient engines and cleaner technology.

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** organised around four forces: continuity, compliance, risk, and trust.

Fuel is the one line where **no regulator is doing the selling for you**. There is no deadline, no auditor, no export licence at stake. The price is the deadline. That changes what wins: brochure percentages do not survive this room, and a measured baseline does. Whoever can demonstrate a saving on this fleet's own data — not on a reference vessel in another ocean — sets the specification everyone else is compared against.

You are invited in through the **cost door**, and you are approved or rejected at the **continuity door**: does it hold up 30–45 days at sea with no technician aboard, does it cost a fishing day inside a shrinking closure window, and who

is accountable if the vessel misses the school. 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	Owens 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.

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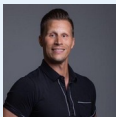
2,800+	10	>95%	25
Attendees at the 2026 industrial expo	Top-tuna general managers in curated 1-on-1 meetings	Of national tuna production represented	Countries represented



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.



“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 fuel profile of the fleet

ON PROCUREMENT NOTICES

There is no public tender for fuel efficiency in Ecuador, and there will not be one. The fleet is privately owned. Repowers, retrofits and efficiency systems are bought vessel by vessel and group by group, by roughly ten companies that control more than 95% of national production, on their own capital and their own timing. **There is no bid list to get onto. There is a room to get into** — and it convenes once a year, in Manta.

WHAT YOU ARE SIZING	THE NUMBER — AND WHY IT MATTERS TO YOU
The fleet	161 industrial vessels, more than 115 of them large-volume purse seiners, with national carrying capacity on the IATTC register in the order of 93,000 t. One base port: Manta. Almost all the volume — and almost all the fuel — sits in IATTC Class 6 (above 363 t carrying capacity).
Vessel dimensions	The top of the fleet is genuinely large. Pesquera Ugavi's <i>Jocay</i> : 91.1 m, 1,883 m ³ of wells, 18 knots. Grupo Jadrán's <i>Juan Pablo II</i> : 93 m × 14.7 m, over 2,000 m ³ , 35 crew, 19 knots. Comparable seiners in this class carry main engines in the 3,000–5,500 hp range. Below Class 6 sit Class 4–5 seiners and longliners over 24 m.
Daily and per-trip burn	Working range for a large Eastern Pacific seiner is roughly 7–13 t/day (about 8,000–15,000 litres) at sea, on trips of 25–45 days. On comparable large seiners, close to 90% of trip fuel is burned steaming rather than fishing, and about 75% of it by the main engine — which is why routing, speed and hull condition, not set count, decide the bill.
Fleet-level consumption	On the order of 35–45 million gallons (130–170 million litres) a year . Two independent routes converge there: the industry's own figure of 2.8% of Ecuador's ~1,600 million annual gallons of diesel, and national catch multiplied by ISSF's 2023 purse-seine intensity of 496 litres per tonne landed. At 2026 prices, a fuel bill in the region of \$200 million a year .
Where the cost sits	Trade associations put fuel at 30–36% of trip cost while the subsidy stood. Applying the 2026 price to the same cost structure moves it close to half. Fuel is now the largest controllable line in the operation, and every point of efficiency is a point of margin.
Why the curves have drifted	Many hulls were designed to hydrodynamic criteria now superseded, then modified for decades — added structures, extended decks, heavier refrigeration. Weight and resistance rose, so more power is needed to hold the same speed. On most of this fleet the design speed–power curve and the real one have separated, and nobody has re-measured the gap.
The installation window	IATTC Resolution C-25-01 sets 64 closure days for 2026 — down from 72 — running 6 Aug–8 Oct or 9 Nov–11 Jan for Class 5 and 6 seiners. In July 2026 IATTC scientific staff proposed cutting that toward 42. Fewer closure days means more sea days, more fuel, and a shorter window in which anything can physically be installed. Only about half the fleet can be serviced in Ecuadorian yards; owners routinely dock in Peru, Chile, Colombia or Panama. Installation logistics are part of the offer here, not an afterthought.
The capex reality	A full repower is put at \$2–3 million per vessel against up to €40 million for a newbuild — which is why retrofit, measurement and optimisation, not replacement, are the realistic market for 2027.
What is not public	Per-vessel daily burn, engine hours, propeller and hull condition, real speed profiles. None of it is published anywhere. It sits with roughly ten general managers — and that is precisely the conversation the curated 1-on-1 room exists to open.

Prepared by Blue Innovation Hub LATAM from public sources: Petroecuador price structures and Executive Decrees; IATTC Resolution C-25-01 and staff documents; CNP and Atunec public statements; ISSF fuel reporting; peer-reviewed purse-seine studies; shipyard records. This is not engineering 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 own the fuel bill, 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.

Fuel efficiency and repower is one of eight innovation lines, and the line is capped. Curation is by sub-category — propulsion and repower; hull, coatings and hydrodynamics; onboard energy and refrigeration; fuel measurement and vessel-performance intelligence; alternative fuels and hybridisation — with one company per sub-category. Which one you occupy 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.

