

MARKET BRIEF · ECUADOR · 2026-2027

Export Logistics & Cargo Visibility in Ecuador's Tuna Industry

Prepared for international supply-chain visibility and cold-chain technology companies · September 2026

USD 1.85 B

Ecuadorian tuna & canned fish exports, 2025

350,000 t

Processed product shipped yearly from Manta & Posorja

14 h / day

Peak scheduled outages during the 2024 power crisis

>95%

Of national tuna production in one room, May 2027

01 · THE LANE

Ecuador's tuna business is won in the plant and lost after the container leaves it.

Ecuador is the world's second largest exporter of processed and canned tuna and has been the leading tuna supplier to the European Union. Exports reached **USD 1,848 million in 2025**, growing 14.4% in FOB value and 12.8% in volume. The country processes roughly 691,000 tonnes of raw tuna a year and ships more than **350,000 tonnes of finished product** out of Manta and Posorja.

Almost all of it moves as reefer cargo on multi-week ocean legs. Once the container leaves the yard, most exporters here have no first-party data on where it is or what condition it is in. What they have are carrier milestone scans and passive loggers, which answer on arrival, when the problem is already a claim.

02 · WHY THE WINDOW IS OPEN

Three pressures are converging on the same shipment.

- **The buyer.** European and North American retail buyers keep raising what they require on custody and condition. **Regulation (EU) 2023/2842** tightens digital traceability across the fishery products chain through 2026 and beyond, and condition evidence is entering the same conversation, driven by buyers rather than by law.
- **The risk.** The 2024 crisis already ran the test. Outages reached 14 hours a day and the president of the National Chamber of Fisheries publicly warned that cold chains at the ports were compromised. The national operator puts an 18% probability of load shedding on the Oct 2026 – Mar 2027 dry season. Cold-chain interruption is recent memory here, not a hypothetical.
- **The margin.** Rejected loads and quality deductions land on a high-volume, thin-margin product. One disputed container erases the margin on many clean ones, and the exporter argues that dispute without independent evidence.

03 · WHERE THE DEMAND SITS

In Manta, the customer and the channel are in the same building.

BUYER SEGMENT	WHAT THEY ARE ACTUALLY TRYING TO SOLVE
Tuna processors & exporters	First-party condition evidence on reefer exports; defensible data when a buyer rejects or deducts
Cold stores & reefer yards	Unbroken custody from plant to vessel; an alarm before product is lost, not a log afterwards
Forwarders & logistics operators	A visibility layer they can resell to their own shipper clients as a service
Cargo insurers & brokers	Objective condition data for claims adjustment and premium design

04 · THE ENTRY PROBLEM

The obstacle is not the technology. It is the commercial term and the trust.

The Incoterm decides who pays. A large share of Ecuadorian tuna leaves on terms where risk transfers at or near the port. When it does, the party who needs the tracker is the buyer abroad, not the plant in Manta, and a good pitch reaches someone with no budget line for it. Which exporters ship on which terms, and which are already being asked for condition data, is in no public report.

And adoption here is peer-driven. Export and quality managers adopt what a comparable company already runs. That is settled in a conversation and confirmed by a pilot, not by email from abroad. Mapping the terms and the buyer pressure company by company, before anyone flies, is the part we work on directly.

05 · THE ROOM WHERE IT IS DECIDED

Expopesca del Pacífico Sur + Blue Innovation Hub LATAM

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 and market-entry engine, so a foreign company enters with institutional legitimacy instead of cold outreach from zero. Over three days, in one venue, sit the owners and general managers of **more than 95% of national tuna production**, with the port operators, cold stores and logistics groups that serve them.

XV EDITION · MAY 12-14, 2027 · CENTRO DE CONVENCIONES DEL PACÍFICO - ULEAM · MANTA, ECUADOR

2,800+

Attendees at the 2026 industrial expo

>95%

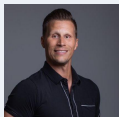
Of national tuna production represented

10

Top-tuna general managers in curated one-to-one meetings

25

Countries represented



"For an innovation company, it cuts months, even years, of commercial work and validation. Direct access to relevant players. We advanced conversations toward pilots and visited facilities."

Jason Hendsch · Sales Director, Trace Register · United States

06 · HOW YOU ENTER

Convene → Accelerate → Continue. Expopesca convenes the industry, the curated one-to-one rounds accelerate it with meetings matched by fit and briefed in advance, and Blue Hub 365 keeps the pipeline alive between editions. Participation is structured by category and assigned in order of confirmation, which is why a short conversation comes first.

NEXT STEP

The 30-minute Fit Call

A realistic go / no-go on Ecuador for 2027: the buyer map for your category, how comparable technology companies entered this market, and the participation format that fits your objective.

Isidro Mendizábal · Innovation Director, Blue Innovation Hub LATAM

hello@bihlatam.com · bihlatam.com · xpocorp.com

Your platform already works. What is missing is the room where the exporter decides to use it.

Sources: Central Bank of Ecuador; CEIPA; FAO; National Chamber of Fisheries; Regulation (EU) 2023/2842; Cenace; Xpocorp / Expopesca registration data. Dry-season figures for Oct 2026 – Mar 2027 are official projections, not outcomes. Compiled September 2026.