



Blue BioTrade in Saint Lucia: Developing value for the sustainable trade and production of queen conch in the Eastern Caribbean **COUNTRY CASE STUDY**



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in cooperation with CITES

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Explanatory notes

References to “dollars” and “\$” indicate United States dollars, unless otherwise stated.

References to “EC\$” indicate Eastern Caribbean dollars.

Use of a dash (–) between dates representing years, e.g., 2015–2018, signifies the full period involved, including the initial and final years.

Reference to metres is represented by “m” centimetres by “cm” and hectares by “ha”.

Reference to kilogrammes is represented by “kg” and pounds by “lbs”.

To reflect the closest estimate for data, decimals and percentages are rounded off. Numbers in money are rounded to the nearest dollar, unless otherwise stated.

Decimals and percentages in this publication do not necessarily add to totals because of rounding.

Acronyms and abbreviations

CBD	Convention on Biological Diversity
CITES	Convention on International Trade in Endangered Species of Wild Fauna and Flora
CPUE	catch per unit effort
CRFM	Caribbean Regional Fisheries Mechanism
EEZ	exclusive economic zone
FAO	Food and Agriculture Organization of the United Nations
HACCP	Hazard Analysis and Critical Control Point
ITC	International Trade Centre
IUU	illegal, unreported and unregulated (fishing)
OECS	Organisation of Eastern Caribbean States
UEBT	Union for Ethical BioTrade
UNCTAD	United Nations Conference on Trade and Development
WECAFC	Western Central Atlantic Fishery Commission

Executive summary

The queen conch (*Strombus gigas*) is a highly appreciated seafood delicacy with important non-food uses, including therapeutical products and handicrafts. While global demand is booming, small-scale coastal producers in the Eastern Caribbean do not fully seize the opportunities offered by sustainable conch markets. In 2020, the United Nations Conference on Trade and Development (UNCTAD), the Organisation of Eastern Caribbean States (OECS) – with the support of the European Union and the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) – joined forces to design a pilot project to test the application of the revised UNCTAD BioTrade¹ Principles and Criteria (UNCTAD, 2020)² to the marine environment, focusing on the queen conch value chain in the countries of Grenada, Saint Lucia, and Saint Vincent and the Grenadines.

This case study presents the value chain analysis of queen conch production in Saint Lucia. It builds on a stakeholder map of the queen conch value chain of Saint Lucia, Grenada, and Saint Vincent and the Grenadines, produced as part of the Blue BioTrade project.³ It is the first of three country case studies to be produced under the Blue BioTrade Project, together with forthcoming studies of queen conch production in Grenada and Saint Vincent and the Grenadines. These case studies, in addition to a regional workshop, will contribute towards the development of a regional Blue BioTrade Action Plan in 2022.

This report is divided into eight chapters. Chapter I provides an introduction and overview of the approach taken by the case study. Chapter II analyses the regulatory frameworks, management plans and institutional frameworks in Saint Lucia as they relate to the queen conch. Chapter III provides a product assessment, looking at Saint Lucian queen conch biology and stock location. Chapter IV analyses the value chain, examining its economic features during the pre-harvest, harvest and post-harvest stages. Chapter V presents an initial assessment of current market access and potential entry points to various potential markets of queen conch products. Chapter VI outlines the main challenges faced by the value chain. It is followed by chapter VII, which outlines opportunities to address these challenges using the BioTrade Principles and Criteria as a guideline. Finally, the report ends by providing recommendations and conclusions in chapter VIII.

The main findings, opportunities, challenges and recommendations reflected in this report include the following:

(a) Main findings:

- (i) **Overview:** Saint Lucia currently has approximately 40 fishers participating in conch fishing. Over the past decade, the fishery has harvested an average of 74 metric tons of “dirty”⁴ conch meat annually. This represents a 73 per cent increase in average landings from the previous decade (2000–2010), when an average of 41 metric tons were harvested, and a 121 per cent increase in landings from the period 1993–1999, when 32 metric tons were harvested.
- (ii) **Domestic market value:** Considering both domestic production and imports, the market for unprocessed conch meat is estimated to be worth approximately \$1.35 million (or EC\$3,663,178) per year in Saint Lucia.⁵

¹ The UNCTAD BioTrade Initiative aims to contribute to the conservation and sustainable use of biodiversity through the promotion of trade and investment in BioTrade products and services. BioTrade is understood as activities related to the collection or production, transformation and commercialization of goods and services derived from biodiversity (genetic resources, species and ecosystems) under environmental, social and economic sustainability criteria, called “BioTrade Principles and Criteria” (UNCTAD, 2020).

² Since their inception in 2007, the BioTrade Principles and Criteria have been the core foundation that guides the implementation of activities of the UNCTAD BioTrade Initiative, the BioTrade programmes and other related activities. In 2020, the BioTrade Principles and Criteria were revised, complementing the evolving legal and policy framework of BioTrade (UNCTAD, 2020).

³ For more information, see UNCTAD, “Stakeholder maps of the conch value chains of Grenada, Saint Lucia, and Saint Vincent and the Grenadines”, available at <https://unctad.org/webflyer/stakeholder-maps-conch-value-chains-grenada-saint-lucia-and-saint-vincent-and-grenadines>.

⁴ “Dirty” conch meat refers to conch meat directly removed from the shell with no further processing.

⁵ Authors’ own calculations. A summing of the average total value of conch landed in Saint Lucia is combined with the estimated value of imported conch using price data provided by the Saint Lucia Department of Fisheries.

This estimate of the value of the market for conch meat does not represent the total contribution of queen conch to the economy of Saint Lucia, as prepared value added conch products play a significant role in Saint Lucian food tourism and restaurants.

- (iii) **Domestic demand:** According to the CITES trade database records, Saint Lucia is a net importer of conch. It imported a total of 235 metric tons from 2015 to 2020, averaging 39 metric tons of conch meat per year, according to according to CITES permits issued by exporting countries. Conch is imported from Saint Vincent and the Grenadines, and Saint Kitts and Nevis, to satisfy internal demand. Increases in demand have been driven by internal consumption and food tourism, driven by increasing international arrivals, playing an increasingly important role in Saint Lucian tourism, a trend that is likely to continue in the long term, regardless of the impacts of the coronavirus disease (COVID-19) pandemic.
- (iv) **Gender:** Female participation is highest towards the end of the value chain, with women specializing in the preparation and sale of value added conch products at fish fries, in the form of fritters, soups, grilled meat and sausages.
- (v) **CITES compliance:** Saint Lucia has submitted CITES annual reports every year for 2010–2016, but reports for 2017–2019 have not yet been received. Saint Lucia has never published export quotas for queen conch. The urgent submission of CITES annual reports is needed to prevent a recommendation to suspend trade.
- (vi) **Need for stock assessments:** Stock assessments of queen conch in Saint Lucia are not routinely undertaken, due to the high cost associated with these activities, and resource limitations in the relevant government agencies. The latest stock assessment was conducted in 2008. Despite this, stakeholders in Saint Lucia expressed a strong desire for a comprehensive stock assessment of queen conch in their territorial waters and within their exclusive economic zone (EEZ). Stakeholders also expressed interest in the further regulation of the fishery through closed seasons, provided these enabled export market access. Notably, Saint Lucian conch fishing grounds are typically deeper, with poorer visibility than traditional conch fishing grounds, making fishing and stock assessments a more resource-intensive activity.

(b) Main opportunities:

- (i) **Forming an economic cluster to share costs and improving external market access:** Clustering with other project countries and other OECS producers would also enable Saint Lucia to overcome the challenge of limited access to external markets, while leveraging its comparative advantage of proximity to high-value export markets. Many opportunities exist to grow the strength of the Saint Lucia conch industry as part of an OECS conch economic cluster. Firstly, the costs of stock assessments could be shared across project countries. Due to the close geographic proximity of project countries and high costs associated with stock assessments, project countries – in association with other queen conch-producing OECS countries – could establish an OECS multispecies stock assessment unit, to share costs. This unit could rotate a small pool of competent officers in stock assessments across OECS geographies.

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