



Blue BioTrade in Saint Lucia

Developing value for the sustainable trade & production of queen conch in the Caribbean

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Overview

- Main features of The Saint Lucian Queen Conch Fishery
 - Value Chain
 - Harvest
 - Post harvest
 - Main challenges
 - Main opportunities
 - Recommendations
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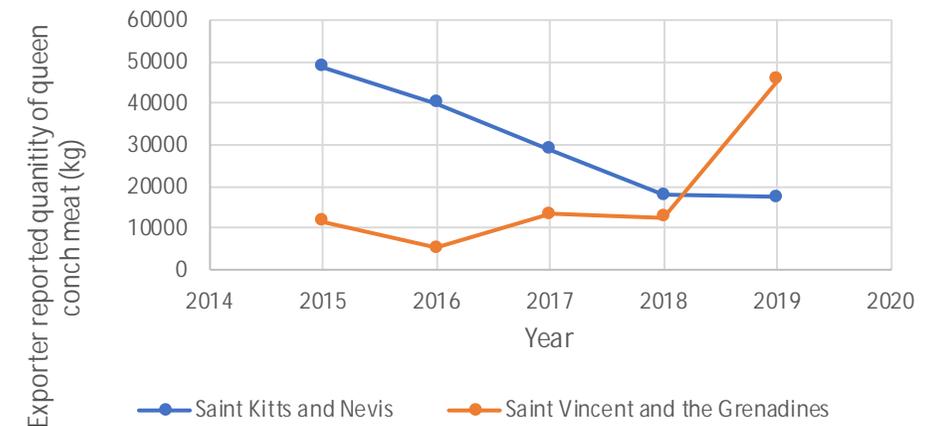
Main Features of Fishery

- Approximately 10-15 Divers
 - Approximately 40 Fishers
- Main Landing Site - Gros Islet
- Between 2010-2020 an average of 74 Metric Tones of Dirty meat was harvested
 - Landings have increased 73 % when compared to 2000-2010
 - Average value of Landings is US \$920,591.98 (EC\$ 2,485,598) per year
 - Peak landings in 2017 of US \$1.18 Million (EC\$ 3.2 million)

Trade

- Saint Lucia is a Net importer of Conch
- Average imports of 39 Tonnes per year representing 45% of total consumption based on CITES export certificates
 - Saint Lucia imports conch meat from both Saint Vincent and the Grenadines, and Saint Kitts and Nevis
 - Saint Vincent playing increasingly important role due to privatization of Fisheries centres
- Including imports total value of queen conch market is approximately US\$ 1.35 million (or EC\$3,66,3178) per year in Saint Lucia.
- CITES export certificates however are not confirmed/ reconciled in Saint Lucia so hard to conclude...
- Saint Lucia likely acts as a centre of Re-export to Martinique and French Caribbean due to language and cultural connections

Exporter reported quantities for queen conch to Saint Lucia



A photograph of a wooden pier extending into the ocean. On the pier, there is a large, light-colored seashell and a pile of green fishing nets. The background shows the ocean, a cloudy sky, and palm trees. The text "The Value Chain" is overlaid in white on the image.

The Value Chain

Harvest Phase

Post Harvest

Inputs

Harvest

Processing

Wholesale

Retail

Consumer

Importation From SVG

Local Fishery
Fishers = 40
Divers = 10-15
Vessels: 10

Gros Islet (78% landings)

Laborie (16%)

Dennerly (3%)

Vieux Fort (1%)

Typical trip cost
600-300 XCD
Inputs: Fuel,
Boat + Engine,
Scuba
equipment

Large processor
(10+ Employees)
N=2
Buy 6-10 per lb
(estimate)

Medium Large processor
(5+ Employees)
N=1 Buy = 10-14 XCD Sell = 19 XCD per lb

Small-Medium processor
(1-5 Employees)
N=6-8 Buy = 10-14 XCD Sell = 18 XCD per lb

Formal Retail Outlets
N= 5
Sell = 23 XCD per lb

Hotel or formal
Restaurant
Sell = 50 XCD per
portion

Local Restaurant/Fish
Fry
Sell = 22 XCD per
portion

Local Consumer
Frozen vacuum
Sealed Conch

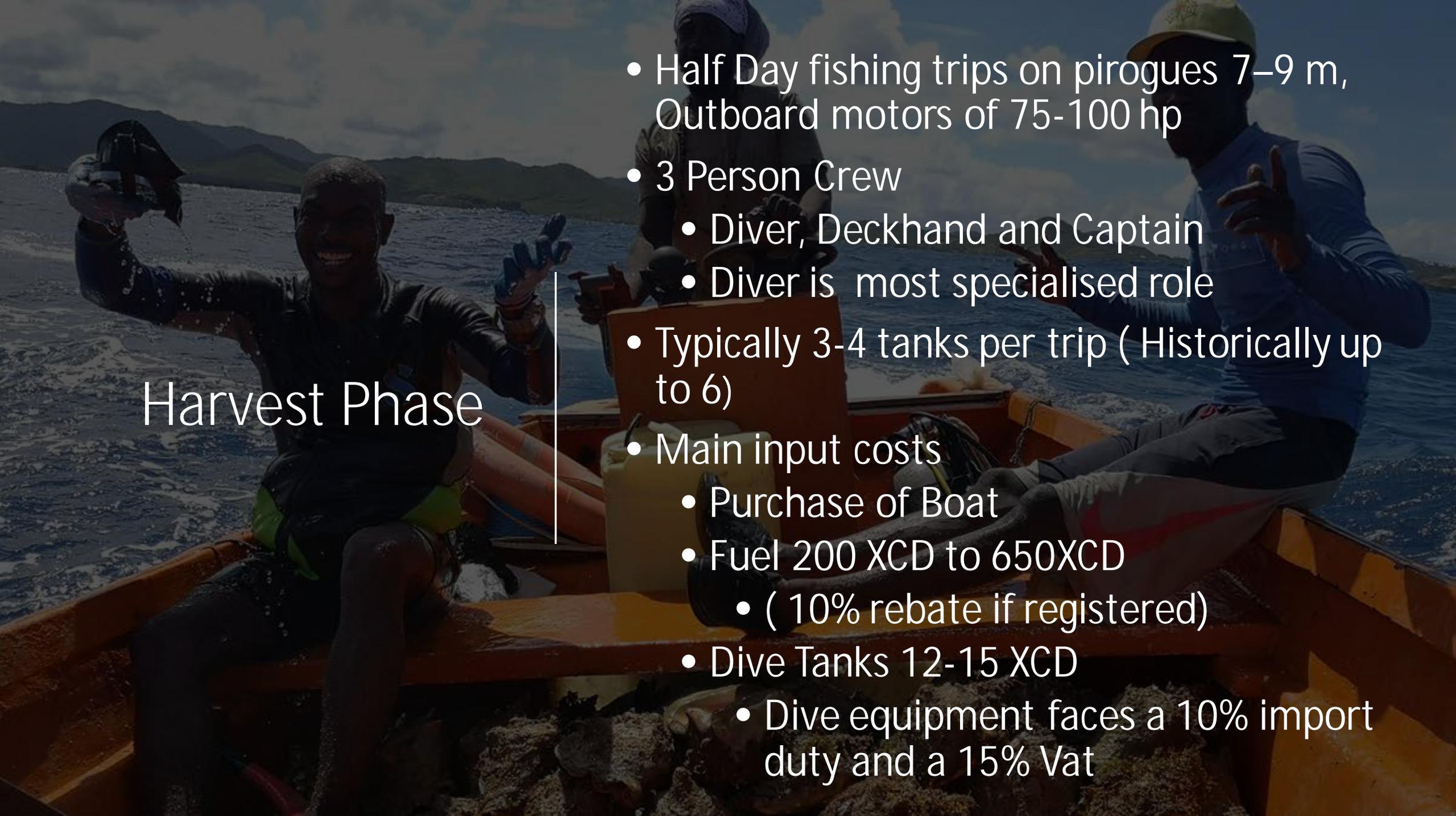
Local Consumer
Prepared Conch

Local Consumer
Fresh (raw)
conch

Regional
Export
Martinique
Fresh
unprocessed
conch
Buy = 23 XCD
per Lb

Retail
Martinique
Processed
conch
Sell = 80 XCD
per Lb

Key
Buy = Price paid for conch inputs
Sell = Price primary product sold at
N = Number of actors



Harvest Phase

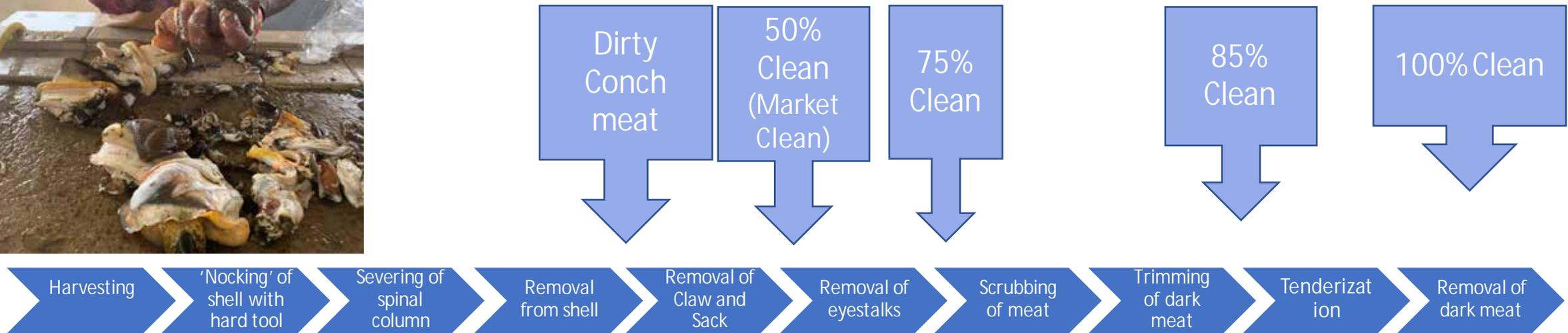
- Half Day fishing trips on pirogues 7–9 m, Outboard motors of 75-100 hp
- 3 Person Crew
 - Diver, Deckhand and Captain
 - Diver is most specialised role
- Typically 3-4 tanks per trip (Historically up to 6)
- Main input costs
 - Purchase of Boat
 - Fuel 200 XCD to 650XCD
 - (10% rebate if registered)
 - Dive Tanks 12-15 XCD
 - Dive equipment faces a 10% import duty and a 15% Vat



Post Harvest Phase

- Landed Conch has always been partially processed i.e. removed from Shell
- At least 4-6 more steps of processing remain (Total of up to 9 steps)
 - Level of processing depends on final consumer
- Major channels include
 - small-medium processors (under 5 employees)
 - Operating at Landing site or small offsite facility
 - large processors (over 5 employees)
 - Francis Seafoods
 - Lucian Blue Ocean Seafoods
- Processors typically do direct retail of 5-10 pound bags of conch to consumers and restaurants, and occasional to large retailers such as massy stores
- Large processors do direct retail to consumers in 2-5 pound bags and large retailers

Steps in Conch Processing



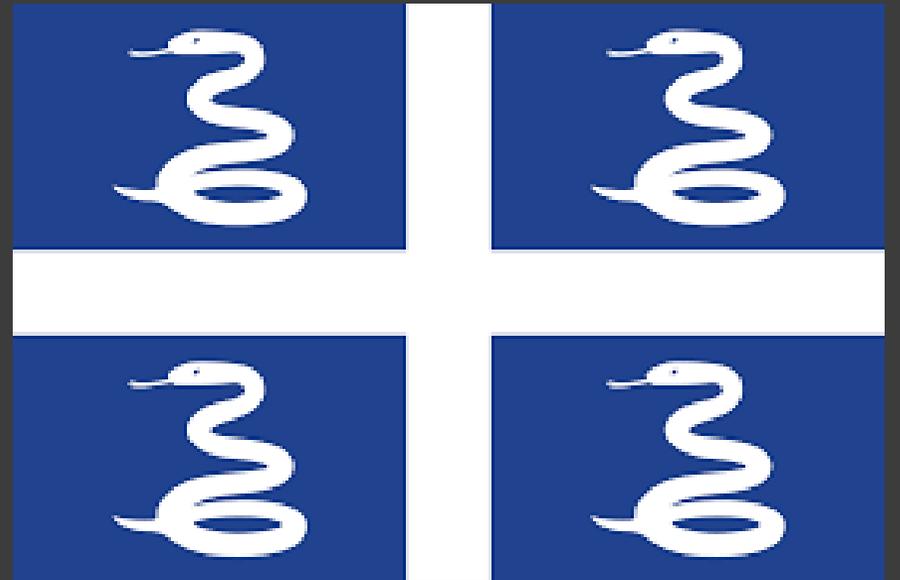
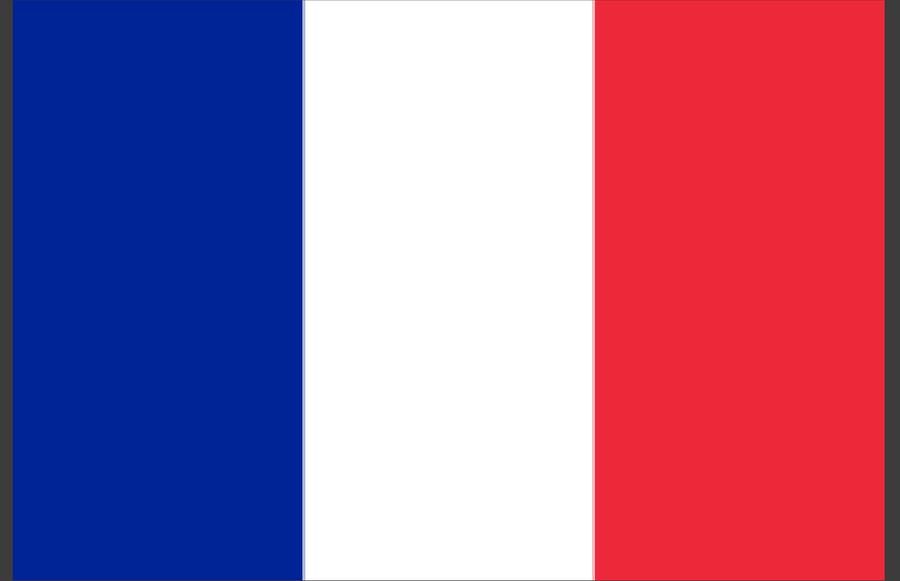


Local restaurants and food tourism

- Conch consumption has become an increasingly important element of the overall Saint Lucian tourism product.
- The Gros Islet Friday night street party and their local events are the is a center of domestic sale of value-added conch by restaurants
 - Grilled, fritters, stewed and even in sausage format
- Typically 1-3 employees (mostly women)
- Maintaining supply to is sector is important for local value addition

Role of Martinique

- Saint Lucia Acts as export and re-export point to Martinique
- High demand and low availability in Martinique drive importation
 - Raw conch prices of 23 XCD per pound (64% higher than local prices)
 - Retail of up to 80XCD per pound
- Demand peaks around Creole Day celebrations
- Trade slowly being displaced by legal imports from Jamaica
- Significant challenge and opportunity for Saint Lucia Conch fishers and processors



Assessment of market access potential – European Union

- The regularization of queen conch trade between Martinique and Saint Lucia is critical for securing the full value of conch harvested in OECS waters and was routinely expressed as a matter of priority by interviewed stakeholders across the value chain.
- Currently, Saint Lucia is not authorised to export conch products to the European Union (including Martinique as an overseas territory of France) as it is not an **approved export country** and has no listed **national competent authority** for the export of seafood products.
- To export queen conch legally to the European Union, The recognition of a competent health authority responsible for performing official controls throughout the production chain.
- This authority is recognised by the European Commission through inspections and bilateral negotiations with relevant national authorities.
 - The Office of the Chief Veterinarian of Saint Lucia is a potential competent health authority based on its current role and capacity within the Saint Lucian conch value chain.

Assessment of market access potential

- Exporting to the United States market also requires certified export processing facilities meeting seafood Hazard Analysis and Critical Control Points (HACCP) regulations set under the United States Food and Drug Administration (USFDA). As mentioned above, there are no HACCP certified facilities in Saint Lucia
- A number of faculties have the potential to be HACCAP certified
- However, US market is dominated by large exporters with close proximity
 - Nicaragua
 - Jamaica
 - Bahamas
- Additionally, prices received are less than EU
 - United States export market receive US\$2.5-4 per pound while prices as high as US\$8.50 per pound are paid in Martinique



Challenges



Main Challenges

- Environmental Challenges
 - Weather and extreme events
- No Stock assessment – difficult to implement proper resource management measures
 - Deep waters and currents make Stock assessments challenging
- Investment needed in expansion and certification of local facilities
- Some CITES reporting challenges
- Exit of divers from industry and loss of traditional knowledge due to health related risks



Main Socio-Economic Challenges

- Strong price incentive for illegal trade with Martinique
- No HACCAP certified plants in Saint Lucia
- Limited appropriate infrastructure for processing
- High occurrence of injury and exit of fishers from industry due to diving related risks
 - Limited training for Divers
 - High cost of equipment certification and maintenance



Main opportunities

- Applying BioTrade Principles and Criteria to facilitate legal and sustainable growth
- High 'quality' of mature deep water Saint Lucian Conch
 - Enables product differentiation
- Legalising trade with Martinique
 - Capitalising on strong cultural and language comparative advantages
 - Partnering with OECS producers to act a point of re-export to EU
- Improving value addition by maximising biproducts and reducing waste
 - Increasing local knowledge of Pearl value
 - Collection and processing (drying) of operculum
 - Collection of shells at landing site for future use
- Forming Economic cluster with other OECS producers to share costs and maximise market access
 - Cost sharing for data collection and stock assessments.
 - Cost sharing of certification to access external markets
 - Saint Vincent and The Grenadines currently does not export to EU market
 - Cost sharing in monitoring and enforcement



Recommendations – Fisher and Diver Well being

- Subsidized annual training for divers in safe diving techniques
- Subsidized equipment certification and maintenance
- Onsite compressors for dive tank filling
- Offering of diver insurance and social safety protections
- Essential investments, and ultimately **cheaper** to state than lifetime healthcare costs

Recommendations – Assessing External Markets

- European Union Export Task force
 - Formation of a multi-stakeholder task force to discuss the steps necessary to regularize the current active unrecorded trade with Martinique
 - Requires diplomatic cooperation and coordination with Martinique and French authorities
 - Many mutual benefits to both Martinique, Saint Lucia and entire OECS
 - Compliance benefits for France
 - Economic benefits to both
 - Economic benefits for other OECS members who do not export to EU

Recommendations – Conch Bi-products

- Centralisation of collection of valuable bi-products for eventual sale
 - Conch operculum
 - training in appropriate processing for export
 - Collection at landing sites
 - Conch Shells
 - More challenging due to volume, collection method depends on planned uses
- Development of formalised pearl appraisal and auction system
 - Most pearl value is captured by middlemen with access and knowledge of external markets, and not by Saint Lucians
 - Annual visit by professional pearl appraiser
 - Potential for auction within OECS countries



Recommendations – Stock assessments

- Immediate stock assessment using novel methods to verify tentative conclusions about fishing pressure and health of Saint Lucian Stock
 - Tentatively expert opinion believes fishing pressure is low....however this needs to be verified
- Essential for the development of proper resource management measures, the development of quotas, CITES reporting and export market access
- Formulation of a **OECS Stock Assessment Unit** to share costs of stock assessments should be considered
- Partnership with CITES to test new Non-Detrimental Findings (NDF) methods should be explored

Recommendations – Innovative Finance

- Seek innovative finance and support small and medium enterprises in both harvest and post-harvest sector
 - In harvest sector, investment is needed in cold storage, cold chain management and in dive safety gear
 - Investment in diver insurance and social safety needed
 - In post harvest sector, processors need support for facility certification and expansion of facility size, and renewable energy for large processors.
- Provided these investments facilitate sustainable export access, could be provide positive yields (but slowly) for investors interested in socially conscious investing (e.g. via blue bonds and blended investment schemes)
- Very attractive for global impact investors

Recommendations – BioTrade

- Apply the BioTrade self-assessment tool as a part of stakeholder engagement activities.
- The application of this self-assessment tool will enable the actors within the Saint Lucia queen conch value chain to understand the strengths and weaknesses of the value chain against important social, economic and sustainability criteria
- Maximizing value addition through promotion of BioTrade conch as a culinary tourism attraction
- The application of the BioTrade Principles and Criteria and the implementation of improved traceability protocols can enable the further marketing of conch products to tourists
 - ‘Saint Lucian BioTrade Conch’

Table 1: BioTrade conceptual framework: mandates, 2020 UNCTAD Principles and approaches

Mandates	BioTrade Principles	Approaches
Millennium Development Goals, Sustainable Development Goals (SDGs)	P1. Conservation of biodiversity	Value chain
	P2. Sustainable use of biodiversity	
UNCTAD (e.g. UNCTAD XII, XIII, XIV, XV)	P3. Fair and equitable sharing of benefits	Adaptive management
	P4. Socioeconomic sustainability	Ecosystem approach
	P5. Legal compliance	
CBD, CITES and other MEAs	P6. Respect for actors' rights	Sustainable livelihoods
	P7. Right to use and access natural resources	

Recommendations- Certification

- Perusing HACCAP certification for Large processors
 - Lucian Blue Ocean Seafood in Gros islet
 - Francis Seafoods in Vieux fort
- Operators of Both facilities have expressed interest in accessing external export markets which requires HACCAP certification.
 - The possibility of these companies acting as the primary processing site for conch in Saint Lucia for the OECS should be further explored as a way of maximizing income earned by the resource through cost savings.





Next steps

- How do you feel about the Findings of the report ?
- Do they accurately reflect your reality on the ground?
- How can they be improved?
- Is there additional data or information that is missing?



Next Steps - Prioritisation of Recommendations in Afternoon Session

- Which recommendations are priority to you?
- What role do you have to play in the activation of these priority recommendations?



Thank you!

Economic Clusters

- A Geographic concentration of business suppliers and associated supporting institutions in a particular sector
- Comprised of producers, service providers/suppliers
- Advantages – Sum or parts greater than whole!
 - Reduces business transaction costs – share suppliers, require similar inputs, marketing costs etc. Reducing transaction costs and improve access of those lower down in the value chain and livelihood outcomes
 - Promotes healthy competition through innovation (vs drive to lowest price innovation)
 - More dynamic in responding to global market changes
- Horizontal cluster – connections between manufacturers of complimentary products (Taking advantage of opportunities in cross OECS sharing of transportation, processing, research and marketing costs)
- Vertical cluster- or supply chain cluster between providers and manufacturers (improving relations between fishers and exporters)

Types of economic Cluster

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