

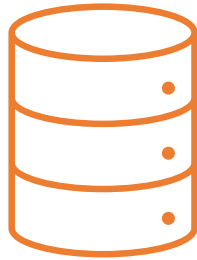


BioTrade Value Chain methodology and country reports

Regional stakeholder webinar on Blue BioTrade
& BioTrade principles and criteria including
CITES requirements
22-23 March 2021



Stakeholder Mapping



Develop Contact Database

Work in collaboration with fisheries division, fisherfolk
Orgs and local mobiliser



Development of primary and secondary stakeholder lists for interviews

Providers of inputs

Fishers

Processors

Retailers

Distributors/ exporters

Fisheries management agencies

Certification and export agencies

Aid and development agencies

Stakeholder Mapping

Virtual interviews

- Aim for representative sample of each actor type considering
 - Geography, gender, and relative size of actor type
- Target key actors through mobiliser
 - Fisherfolk at start of value chain + other private sector actors
- Interviews focus on
 - Sustainability opportunities and challenges
 - Marketing opportunities and challenges
 - Information flow in value chain
 - Regulatory Frameworks
 - Gender Considerations



Who are the actors involved in these processes (and what do they do)?



Scale – How many people are employed at this stage / What is the typical enterprise size?



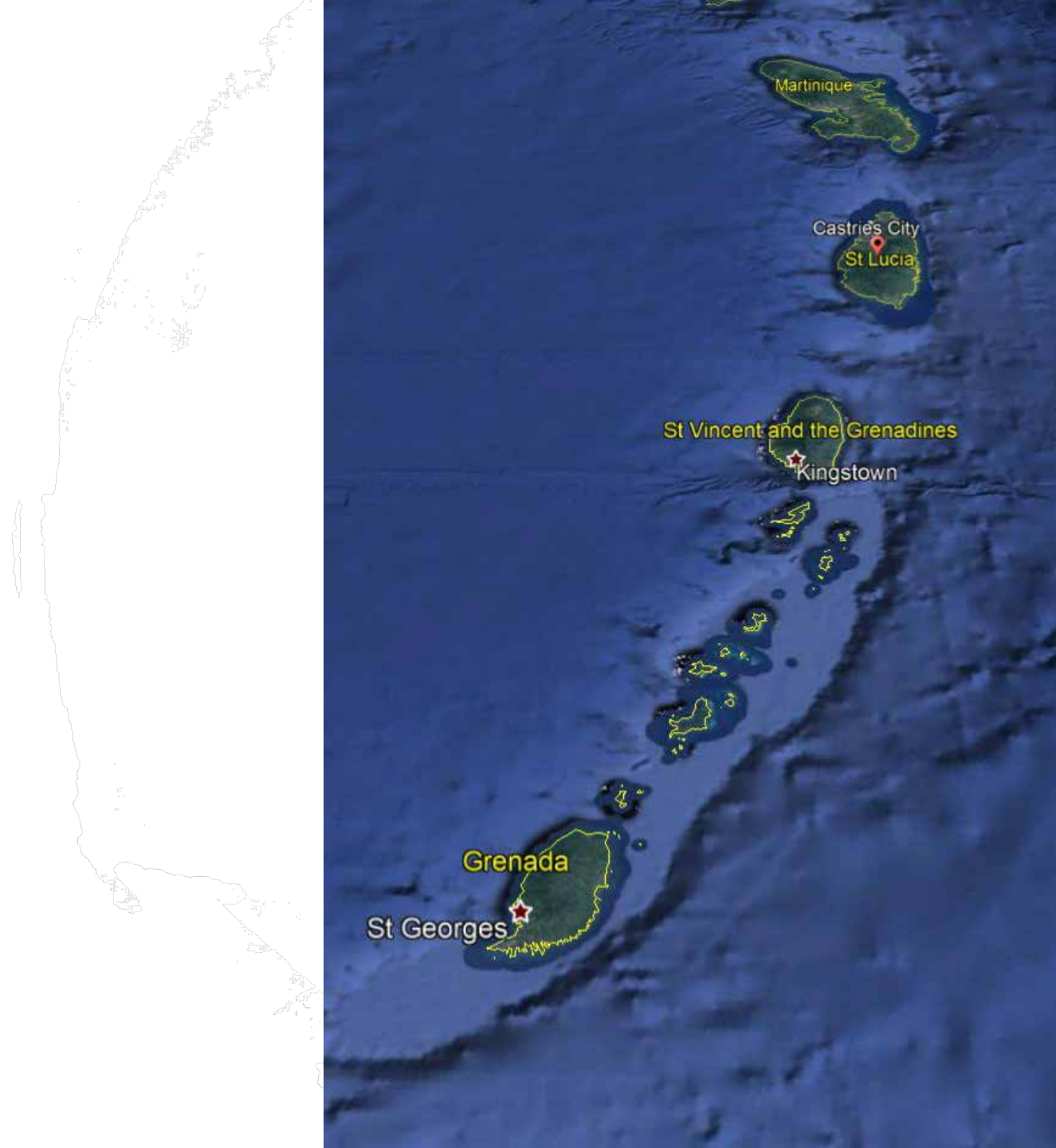
Location – Where does this process happen?



Power & equity - how are they distributed along the VC?

Country Case Studies

- Deep dive into the Queen Conch Value Chain in 3 countries
- Primary methods
 - Virtual Interviews with stakeholders (building on previous stakeholder mapping interviews)
 - Data collection with FD
 - Validation workshop with stakeholders
- One case study per country
- Starting with St Lucia
- Grenada and St Vincent and the Grenadines





Introduction to stakeholder mapping

- Harvest Methods in regional Queen Conch Fishery
- Overview of Queen Conch VC in beneficiary countries

Regional Harvest Methods

- Typically a crew of 3 (2-4)
 - Smaller boats (doryies) with outboards 2-5 Meters
 - Some medium sized boats supported by larger boats
 - Scuba or compression snorkel (limited Freediving)
 - Some use of nets
- Key Inputs
 - Boats, engine, scuba gear, nets
 - Area/tools for processing (sometimes done at sea)
 - Sacks or iced coolers for storage
 - Significant boat production in Grenadines

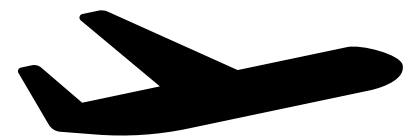


St Vincent and the Grenadines Stakeholder Mapping

- Main export by value + volume
 - 4th Largest CRFM producer
- 227 Tonnes production in 2017
- Approximately 70 Fishers
- Large and medium processors/aggregators operating in VC
- Significant Regional and International trade
 - Owia/Union/Bequia -> St Lucia
 - Martinique?
 - USA/Barbados/Trinidad



Draft Stakeholder Map St Vincent and the Grenadines



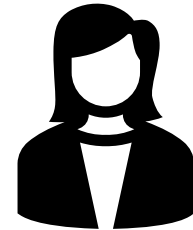
International
Export (USA)



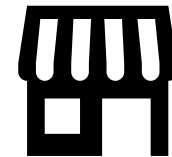
Regional Export (St Lucia,
Martinique, BB, TT)



Hotels/Tourists
/Restaurants



Local
Consumer



Supermarket

Fishing
Communities
Fishers = 75

Bequia

Union Island

Canouan

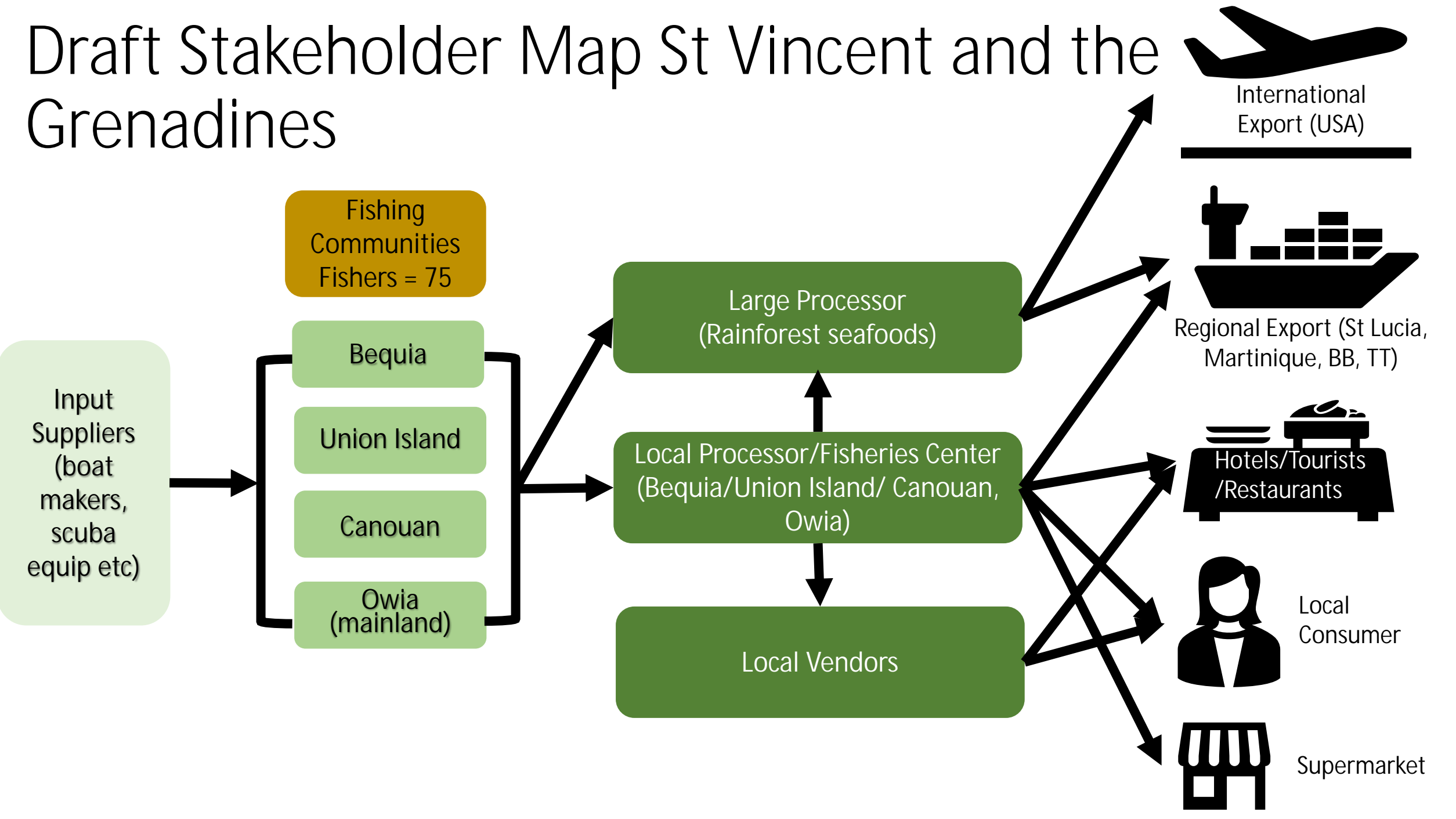
Owia
(mainland)

Large Processor
(Rainforest seafoods)

Local Processor/Fisheries Center
(Bequia/Union Island/
Canouan,
Owia)

Local Vendors

Input
Suppliers
(boat
makers,
scuba
equip etc)

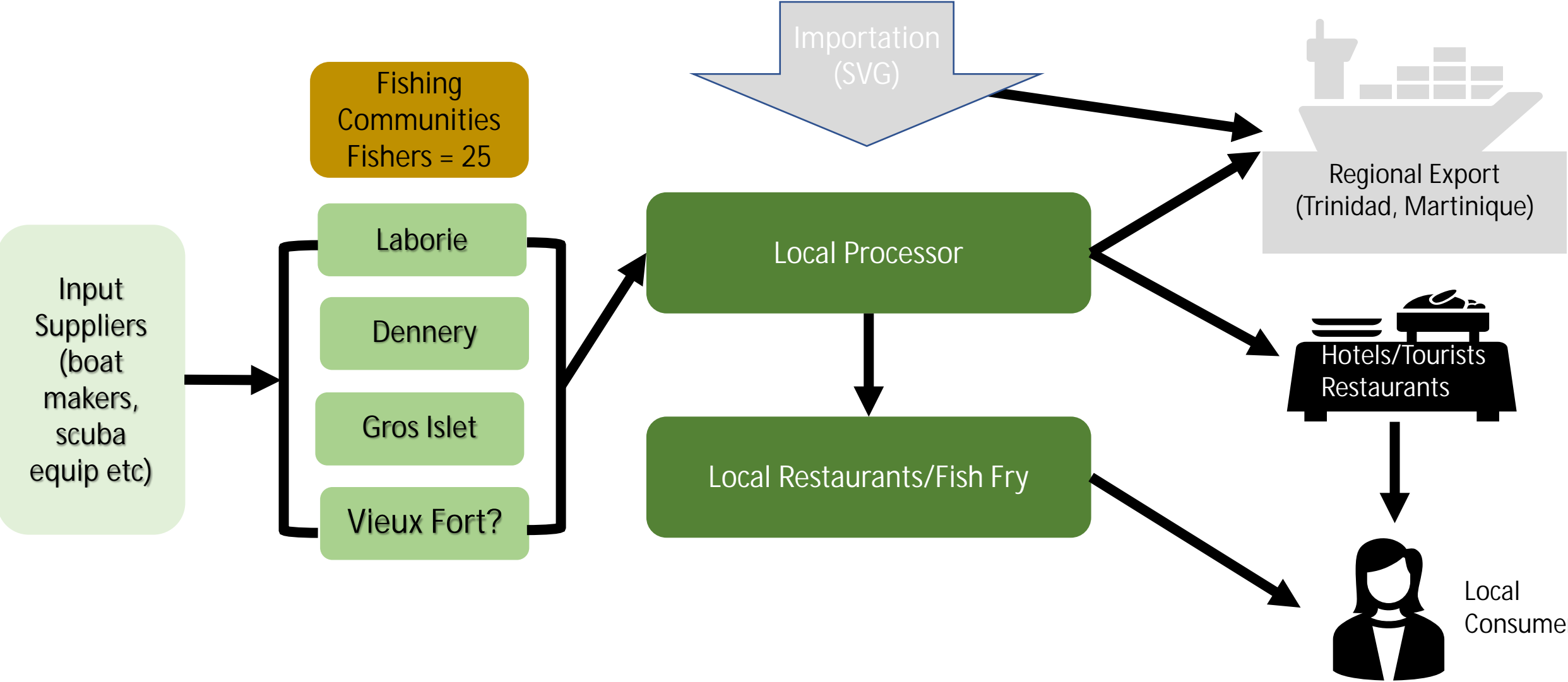


St Lucia – Stakeholder Mapping

- 98 Tonnes Production in 2017 .
 - Approx. 25 Fishers
- Demand exceeds local supply
 - Hotel/Restaurant demand
 - Domestic consumption
 - Fluctuating production levels
- Re-export to Martinique is active
- Much deeper waters
 - Challenging harvest and safety
- Significant local consumption
 - Both domestic and tourist
- Strong fish fry culture
- Importation from other islands (SVG/Bequia)



Draft Stakeholder Map St Lucia

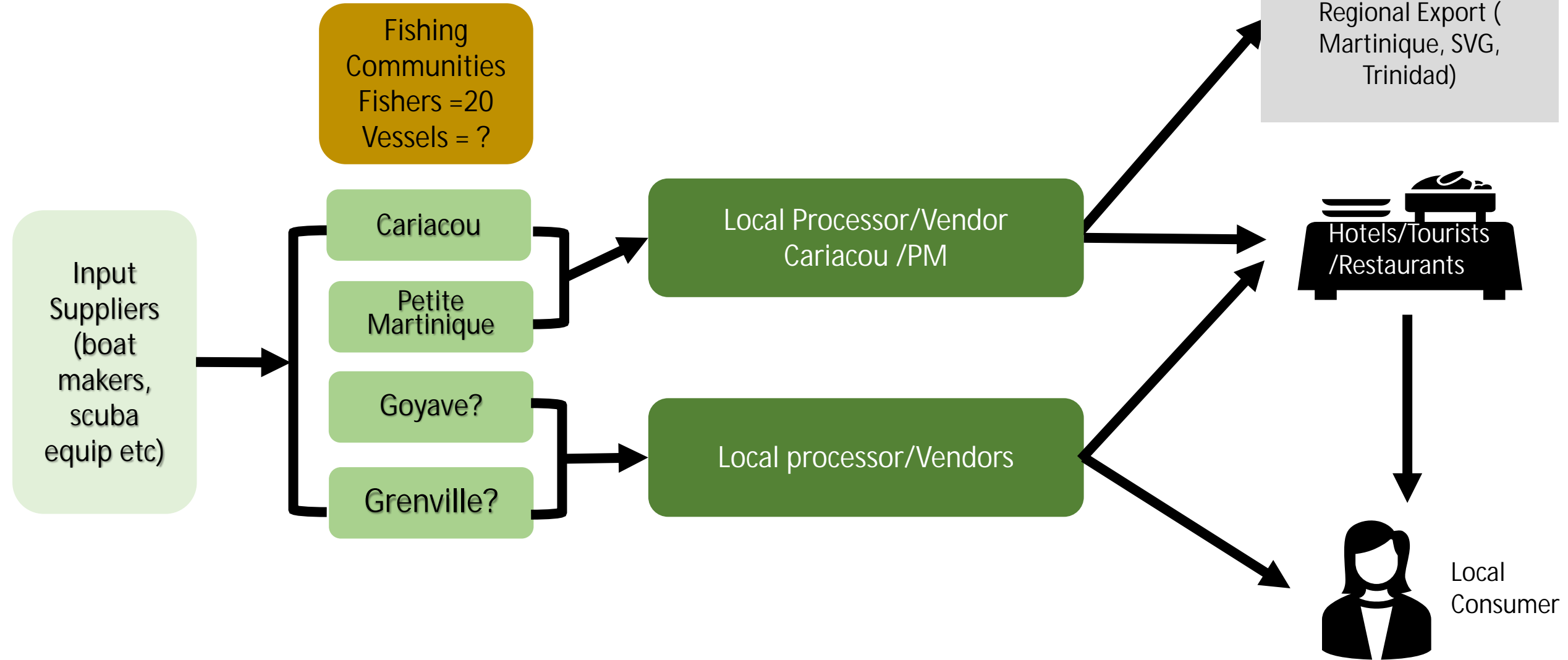


Grenada Stakeholder Mapping

- Grenada is a Tri Island State
 - Grenada, Carriacou and Petite Martinique
- 23 Tonnes landed in 2017
- Demand Exceeds supply
 - Significant domestic and tourist demand
- Carriacou and Petite Martinique well connected to grenadines
- CITES challenges relate to stock assessments



Draft Stakeholder Map Grenada





Challenges of Queen Conch Value Chain

- **Stock Assessments**
 - Depth Currents and turbidity of deep EC waters
- **Maintain the cold chain**
- **Cost of HACCAP and SPS**
- **Inter agency coordination**
- **Limited innovation and creativity in packaging** Need to move away from 'vacuumed seal with white sticker'



Opportunities for Queen Conch Value chain

- Improving subregional product transportation efficiency for reduced spoilage and fuel usage
- Seeking direct access to end markets
- Increasing sustainability through aquaculture/spawning?
- Collaboration with export support agencies for SMES, certification, health and SPS

Opportunities for Queen Conch Value chain

- Increasing safety through dive certification
 - Using dive certification to maximise fishery efficiency & regulation efficiency
- Working towards certification for increased income
- Benefits of Economic clusters – connections between manufacturers of complimentary products
 - Sharing of marketing costs, research and development costs, enforcement costs
 - Promotes innovation
 - More dynamic in responding to global market trends

Next steps

- Stakeholder mapping
 - Support from Fisheries Division and Fisherfolk orgs
 - Virtual Interviews (April)
- Country case study
 - Validation Webinar St Lucia (May)
 - Completed case study St Lucia (June)
 - Validation Webinars Grenada SVG Q3 of this year
 - Phases 2 & 3