

Crocodile Specialist Group Steering Committee Meeting
Double Tree Hilton, Darwin, Australia
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Industry Report

The interdependence of conservation, sustainable practices, livelihoods, and the crocodilian industry is significant, with conservation efforts being intricately linked to industry demands. The market for crocodilian skins and meat plays a crucial role, as it generates the majority of the funding and revenue necessary for governments to sustain successful wildlife management programs for these species. The CSG and its members are central to this dynamic, playing a pivotal role in harmonizing conservation efforts with industry needs. This relationship is unique within the IUCN Species Specialist Groups, as the CSG is distinctive in having industry members as part of its composition. Such an arrangement underscores the symbiotic relationship between conservation and industry, where the collapse of either would adversely affect the other. Maintaining the industry is not just about profits; it's a complex, specialized task integral to the conservation of crocodilians, requiring substantial investment and dedicated research, as recognized by the CSG, SSC and IUCN.

Market Overview:

The market for crocodilian products, including skins, meat, and various byproducts, has experienced dynamic shifts over the years. Driven by a mix of fashion trends, conservation efforts, and changing consumer preferences, this market is as complex as it is fluctuating.

Crocodilian Skins: A Luxury Staple

Crocodilian skins have long been a symbol of luxury and exclusivity in the fashion industry. Used in high-end leather goods like handbags, belts, and shoes, the demand for these skins is primarily driven by luxury brands in Europe and North America. However, recent trends show a growing market in Asia, particularly in China and Singapore. The rarity and unique pattern of branded crocodilian luxury products command high prices, making it a highly profitable segment.

Despite the profit margins, the crocodilian skin industry faces challenges. Ethical concerns and the rise of sustainable and synthetic alternatives could impact future demand. However, industry stakeholders are increasingly adopting sustainable and ethical practices, working closely with conservation groups to ensure a balance between luxury and environmental responsibility.

Crocodilian Meat: An Expanding Market

Traditionally overshadowed by the skin market, crocodilian meat is gaining popularity. Once considered a byproduct, it is now recognized for its lean, high-protein quality, finding a place in exotic meat markets around the world. The USA and some parts of Europe have seen a steady increase in demand for crocodilian meat, often marketed as a gourmet product. This segment faces its own set of challenges, including public perception and stringent food safety regulations. However, with growing interest in exotic meats and a shift towards more adventurous eating habits, the potential for growth in this market is significant.

Byproducts: Untapped Potential

Crocodilian byproducts include oils, bones, and other parts used in various industries. For instance, crocodile oil is known for its medicinal properties and is used in cosmetics and pharmaceuticals. These byproducts represent an untapped market with considerable growth potential. As sustainability becomes more important, utilizing every part of the animal reduces waste and adds value to the industry.

Industry Outlook and Challenges

The future of the crocodilian product market is promising but not without challenges. Key among these is the need for sustainable and ethical practices. Collaboration between industry stakeholders, conservationists, and governments is crucial to ensure the industry's longevity. The CSG plays a vital role in this, promoting sustainable use and conservation of crocodilians.

The market for crocodilian skins, meat, and byproducts is poised for growth, driven by a combination of luxury demand, culinary trends, and the potential of untapped byproducts. However, the industry's success hinges on its ability to adapt

to ethical and sustainable practices, ensuring that this ancient species continues to thrive both in the wild and in the marketplace.

Strategies to Rejuvenate Declining Market:

Enhance Sustainable Practices: Implement and promote sustainable farming and harvesting methods to ensure long-term species viability.

Boost Conservation Efforts: Collaborate closely with conservation groups, like the IUCN Crocodile Specialist Group, to support wildlife management programs that benefit crocodilian populations.

Promote Ethical Sourcing: Develop and adhere to stringent ethical sourcing guidelines to appeal to environmentally conscious consumers.

Expand Market Reach: Explore new markets and diversify products, particularly in regions where crocodilian products have not been traditionally popular.

Educate Consumers: Increase awareness about the benefits of crocodilian products, focusing on the unique qualities of crocodilian leather and the nutritional value of the meat.

Innovate in Product Development: Create new and innovative products, especially in the fashion industry, to revitalize interest in crocodilian skins.

Leverage Technology: Use technology to improve farming techniques, product tracking, and traceability, ensuring quality and transparency in the supply chain.

Enhance Marketing Strategies: Adopt modern marketing strategies, including digital marketing, to reach a broader and more diverse audience.

Build Partnerships with Luxury Brands: Strengthen relationships with luxury brands to maintain the high-end appeal of crocodilian leather products.

Adopt Regulatory Compliance: Ensure compliance with international regulations and standards to maintain market access and consumer trust.

Research and Development: Invest in R&D to discover new uses for byproducts, improving overall profitability and sustainability.

Respond to Consumer Trends: Stay attuned to changing consumer preferences, such as the increasing demand for sustainable and ethical luxury products.

By implementing these strategies, the crocodilian product industry can address current challenges and position itself for recovery and growth in the global market.

Overview:

The “World Trade in Crocodilian Skins 2019-2021” report provides crucial insights into the global trade dynamics of crocodilian skins. It highlights a significant reduction in the export of all crocodilian skins during the period from 2018 to 2021. Specifically, there has been an overall decrease of 26.5% in the exports of these skins. This decline is indicative of changing market conditions, possibly influenced by external factors like economic shifts and the impact of the COVID-19 pandemic, which severely disrupted global trade and supply chains.

Breaking down this overall trend, the report details a 25.7% reduction in exports of classic crocodilians, which include various species of crocodiles and alligators. Similarly, the trade in caiman skins, which represents a substantial part of the crocodilian skin market, experienced a 26.3% decrease in exports during the same period. These figures demonstrate a consistent downward trend across different categories of crocodilian skins, reflecting a notable shift in the industry. This reduction could be attributed to a range of factors:

Impact of the COVID-19 Pandemic: The pandemic has had a profound impact on global trade, affecting supply chains, consumer demand, and international transportation. The lockdowns and economic slowdown during this period likely contributed significantly to the reduction in the trade of crocodilian skins.

Changing Market Demands: Consumer preferences and fashion trends are dynamic and can shift rapidly, potentially leading to reduced demand for crocodilian skins in the fashion and luxury goods market.

Increased Conservation and Regulatory Efforts: Stricter enforcement of international regulations, such as those imposed by CITES, and heightened awareness of wildlife conservation issues might have led to a decrease in the trade. These efforts often aim to ensure sustainability and prevent over-exploitation of species.

Economic Factors: Global economic conditions, independent of the pandemic, can also influence the trade in luxury goods, including crocodilian skins. Economic downturns in key markets could result in reduced demand.

Alternatives to Crocodilian Skins: The development and increasing popularity of synthetic alternatives or other materials may also play a role in decreasing the demand for genuine crocodilian skins.

Trade Data from International Alligator and Crocodile Trade Studies (IACTS)

Table 2. Direct, commercial global exports of skins from the main taxa, 2012-2021.

Taxon	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
<i>Alligator mississippiensis</i>	326,538	481,304	485,884	428,521	553,371	463,466	596,258	507,496	*437,364	*393,055
<i>Crocodylus acutus</i>	2,318	1,905	2,262	3,353	3,233	5,040	5,295	8,182	2,291	1,697
<i>Crocodylus moreletii</i>	679	1,300	2,031	1,291	1,640	3,000	4,338	421	170	0
<i>Crocodylus niloticus</i>	205,489	275,288	282,859	278,094	317,121	250,150	230,312	260,821	155,213	243,174
<i>Crocodylus novaeguineae</i>	23,461	26,046	24,982	39,070	14,022	7,649	8,790	8,023	2,192	2,445
<i>Crocodylus porosus</i>	72,382	57,701	67,979	69,470	102,768	72,173	75,774	67,510	40,724	51,950
<i>Crocodylus siamensis</i>	35,450	55,776	48,557	58,558	33,349	35,407	55,825	19,761	48,607	32,857
Subtotal of 'classic' skins	666,317	899,320	914,554	878,357	1,025,504	836,885	976,592	872,214	686,561	725,178
<i>Caiman crocodilus crocodilus</i>	47,130	45,485	35,196	30,594	22,328	41,402	41,071	17,251	6,732	*3,788
<i>Caiman crocodilus fuscus</i>	625,128	857,115	738,401	530,357	368,515	315,338	370,807	365,957	244,569	316,230
<i>Caiman latirostris</i>	5,755	5,602	8,893	8,610	5,525	3,652	2,811	3,909	10,356	2
<i>Caiman yacare</i>	111,078	115,283	94,456	128,203	52,709	65,243	31,953	43,956	13,509	1,167
<i>Melanosuchus niger</i>	275	51	290	584	0	0	1,044	0	0	0
Subtotal of caiman skins	789,366	1,023,536	877,236	698,348	449,077	425,635	447,686	431,073	275,166	321,187
Grand total	1,455,683	1,922,856	1,791,790	1,576,705	1,474,581	1,262,520	1,424,278	1,303,287	961,727	1,046,365

Source: International Alligator and Crocodile Trade Studies (IACTS) are conducted by the World Conservation Monitoring Centre (WCMC) funded by the Louisiana Department of Wildlife and the Louisiana Alligator Advisory Council

Collaborative Efforts in Crocodilian Conservation: International Crocodilian Farmers Association and the IUCN Crocodile Specialist Group

The International Crocodilian Farmers Association (ICFA) stands as a pivotal organization in the global effort to balance the conservation and sustainable utilization of crocodilian species. Operating in tandem with entities like the CSG, the ICFA plays a crucial role in marrying commercial interests with conservation goals.

The ICFA, comprised of crocodilian farmers, industry experts, and conservationists, focuses on promoting sustainable and ethical practices within the crocodilian industry. Its mission involves ensuring the long-term viability of crocodilian populations through responsible farming and harvesting methods. The ICFA also plays a significant role in public education, debunking myths about crocodilians and highlighting their ecological importance.

The alliance between the ICFA and the CSG is a testament to their shared vision for crocodilian conservation. Their collaboration encompasses several vital initiatives:

Joint Research Initiatives: Pooling resources and expertise, these organizations engage in comprehensive research, crucial for informed conservation strategies.

Knowledge Sharing and Best Practices: This partnership facilitates the exchange of scientific knowledge and insights into market trends, enhancing conservation and industry practices.

Unified Conservation Efforts: Together, they advocate and implement conservation measures, including habitat preservation and anti-poaching campaigns.

Setting Industry Standards: The collaboration aims to establish rigorous standards for ethical and sustainable crocodilian harvesting, ensuring industry regulations align with conservation goals.

Educational Campaigns: Joint efforts in public awareness campaigns educate on the importance of crocodilian conservation and sustainable use.

Policy Advocacy: Their combined influence is stronger in shaping policies at various levels, promoting regulations that support conservation and sustainable industry practices.

The ICFA and the CSG are united in their objectives of conserving crocodilian species and advocating for ethical harvest practices. This collaboration ensures that the commercial utilization of crocodilians does not compromise their survival in the wild. Instead, it contributes to their conservation, exemplifying a model where economic and ecological interests are harmoniously balanced.

The partnership between the ICFA and the CSG represents a forward-thinking approach to wildlife management. It illustrates how conservation and industry can collaborate effectively, ensuring the sustainable coexistence of human activities and crocodilian populations. Through their combined efforts, these organizations set a standard for responsible wildlife management, benefiting both the natural world and human communities.

Crocodilian Bans/ Trade Disruptions:

Government Ban - California (USA)

In a landmark decision by Federal Judge Kimberly Mueller in California's Eastern District Federal Court in Sacramento, the ban on alligator and crocodile products, initially enacted in January 2020, was overturned in July 2023. This reversal marked a significant victory for the alligator and crocodile industry and was a culmination of efforts by key legal and conservation figures.

The case was buoyed by a strong plaintiff group representing nearly all facets of the alligator and crocodile industry's supply chain, including farmers, meat processors, product manufacturers, and commercial retailers. Bret Sparks, an attorney and a member of the CSG, played a pivotal role in advocating for the sustainable use of these species. His expertise and deep understanding of both the legal and environmental aspects of crocodilian conservation were instrumental in presenting the case.

Adding significant weight to the legal challenge was Jeff Landry, the former Attorney General of Louisiana and now Governor of the State of Louisiana. His involvement underscored the importance of the case not just for California but for states like Louisiana, where alligator farming and harvesting are integral to the economy and conservation efforts.

Highlights of the Ruling:

Conservation and Sustainable Use: The ruling by Judge Mueller brought to light the success stories in conservation achieved through sustainable use. It acknowledged the role of regulated farming and hunting in recovering alligator populations, particularly in states like Louisiana and Florida. This sustainable approach effectively balances ecological conservation with economic viability.

Economic and Social Considerations: The economic impact of the ban, which had been set to take effect in January 2020, was a significant aspect of the case. The industry, represented by Bret Sparks and supported by Governor Jeff Landry, emphasized the livelihoods dependent on this trade and the broader economic ramifications.

Scientific and Regulatory Frameworks: The legal team highlighted the scientific basis for sustainable harvesting practices and the industry's adherence to international standards, notably CITES. The argument was that these practices ensure the trade does not threaten the survival of these species.

Legal and International Compliance: The decision by Judge Mueller also focused on the alignment of state laws with international regulations, underscoring the importance of adhering to established global conservation frameworks.

Moving Forward:

With the overturning of the California ban, there is renewed optimism in the alligator and crocodile industry and among conservationists who advocate for sustainable use. The successful legal challenge, led by skilled attorneys like Bret Sparks and supported by influential figures like Governor Jeff Landry, is seen as a testament to the efficacy of a balanced approach to wildlife management. This approach combines economic development with the preservation of species, setting a precedent for future conservation and industry practices.



CITES Trade Suspension on Mexico: Extended Impacts and Background

In a significant development for international wildlife conservation, the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) imposed a trade suspension on Mexico in March 2023. This measure, primarily aimed at addressing non-compliance issues, notably with respect to the Totoaba (*Totoaba macdonaldi*), was lifted swiftly in April 2023 following Mexico's rapid response and collaboration with CITES. This episode is a prime example of how CITES employs trade suspensions effectively to enforce compliance and foster conservation efforts.

The trade suspension imposed by CITES on Mexico, which lasted from March to April 2023, was a significant event with extensive implications, particularly affecting the alligator and crocodile industry and the western cowboy boot sector. This suspension, though brief, served as a critical reminder of the interconnectedness and fragility of international wildlife trade.

The trade suspension, initiated in March 2023, was in effect for approximately one month. During this period, all commercial trade in specimens of CITES-listed species with Mexico was halted. This swift resolution was due to the proactive and cooperative response of the Mexican Government, but even within this short timeframe, the ripple effects were felt strongly across various industries reliant on wildlife products.

The primary reason for the trade suspension was Mexico's non-compliance with CITES regulations, specifically concerning the Totoaba, a critically endangered species. The Totoaba has been a target for illegal fishing due to the high demand for its swim bladder in international markets, especially in Asia for traditional medicine. This illegal trade has not only threatened the survival of the Totoaba but also had collateral impacts on other marine species, including the critically endangered vaquita, a small porpoise.

CITES, recognizing the severity of the situation and Mexico's failure to submit an adequate compliance action plan by the stipulated deadline, opted for a trade suspension. This measure was aimed at compelling Mexico to enhance its regulatory and enforcement mechanisms to protect the Totoaba and comply with international conservation standards.

The response from Mexico was both swift and commendable. Mexican authorities, recognizing the gravity of the situation and the potential impact on both biodiversity and the economy, acted quickly to address the issues raised by CITES. Their actions included strengthening regulatory frameworks, enhancing monitoring and enforcement mechanisms, and improving the management of species under threat.

What stands out in this episode is the exemplary collaboration between CITES and the Mexican Government. CITES worked closely with Mexican officials to identify shortcomings and to develop a roadmap for compliance. This collaborative approach not only expedited the process of lifting the embargo but also strengthened the relationship between the international body and the Mexican Government, setting a precedent for future cooperation.

The trade suspension, although targeted at addressing issues related to a specific species, had broader implications for other wildlife trades, including the alligator and crocodile industry. Particularly impacted was the western cowboy boot industry, which relies on the import of exotic leathers. The suspension halted the import of alligator and crocodile leather products into the USA, leading to shortages and economic strain.

This incident highlighted how non-compliance in one area of CITES regulations can have a domino effect, impacting various industries and livelihoods that are seemingly unrelated. The suspension underscored the need for industries involved in wildlife trade to not only ensure their compliance with CITES regulations but also to be aware of and support broader conservation efforts.

The CITES trade suspension on Mexico, though lasting only a month, had significant and immediate effects on multiple industries, demonstrating the delicate balance that exists in the global wildlife trade. It reinforces the importance of adherence to international conservation agreements and the need for collaborative efforts to ensure sustainable trade practices. For industries like those involved in the production of alligator and crocodile products, this episode served as a crucial reminder of the need for constant vigilance and participation in global conservation efforts.

CITES and United Nations Celebrate Crocodilian Conservation, Spotlighting Louisiana's Pioneering Role

On 3 March 2023, a significant event unfolded in Washington DC at the National Geographic Society's Grosvenor Auditorium - the 50th anniversary of the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) coincided with the United Nations World Wildlife Day. Under the theme 'Partnerships for Wildlife Conservation', this event highlighted the global efforts in wildlife conservation, with a special focus on crocodilian conservation and the exemplary role of Louisiana in the American alligator's recovery.

One of the presentations of the day was delivered by Christy Plott. Her speech focused on the remarkable recovery of the American alligator through sustainable use, exemplifying the theme of the CSG meeting: "Crocodile conservation: what works!" Plott emphasized how partnerships between government, science, and brands have woven together a narrative of success in sustainable use and conservation, using the Louisiana alligator program as a prime example.

The role of the CSG was also emphasized, particularly its collaboration with Louisiana in shaping effective conservation strategies. The success of the American alligator is a testament to the impactful work of this group, demonstrating how science-driven policy can lead to tangible conservation achievements.

At the event, both Ivonne Higuero, Secretary-General of CITES, and Martha Williams, Director of the US Fish and Wildlife Service, highlighted the essential role of international partnerships in the field of conservation. They gave special recognition to Louisiana for its innovative strategies in managing alligators and its considerable contributions to the preservation of wildlife. A special thank you should be given to Christine Lippai for her attendance and support on the special day.

The United Nations World Wildlife Day 2023 served as a global acknowledgment of the strides made in crocodilian conservation, with Louisiana's program for the American alligator standing as a beacon of success. The presence of figures like Christine Lippai and Christy Plott underscored the collective dedication to wildlife conservation. The event reaffirmed the critical role of partnerships - be they local, national, or international - in safeguarding our planet's biodiversity for future generations.



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