Agenda Item SC. 3.1

Crocodile Specialist Group Steering Committee Meeting
Sofitel Royal Bay Hotel, Agadir, Morocco
(12 May 2026)

Industry Report

The crocodilian industry continues to stand as one of the clearest examples of conservation through sustainable use working at scale. This is not theoretical. It is a functioning system that ties together habitat protection, species recovery, and economic value across multiple continents.

In many range states, the ability to generate value from crocodilian species remains the foundation of conservation success. Governments rely on it to fund management and enforcement. Landowners rely on it to justify maintaining wetlands and habitat. Rural communities depend on it for income. When the market is strong, conservation outcomes follow. When the market weakens, those incentives begin to erode.

The CSG remains unique within IUCN in formally including industry as part of its structure. That is not incidental. It reflects the reality that conservation and commerce in this space are directly linked. Removing one from the equation undermines the other.

Market Overview

The global crocodilian market is still adjusting to structural changes that began before COVID and accelerated through it. Crocodilian leather remains one of the most exclusive materials used in luxury goods. However, demand is now more concentrated and more controlled. Large luxury groups have consolidated purchasing power and increasingly manage supply chains internally. This has shifted the market toward consistency, traceability, and long-term supplier alignment.

At the same time, a number of traditional retail channels that historically supported exotic leather have either disappeared or reduced exposure. Some brands have stepped away from exotics, often driven by perception rather than conservation science or verified data.

The result is a market that is smaller in volume, more selective, and more dependent on a limited number of buyers. This has created pressure across the supply chain, particularly for wild skins, which remain essential to conservation programs but are not always positioned effectively in the current luxury landscape.

Trade Data and Market Trends

The most recent IACTS report provides important context for where the industry stands today. Between 2021 and 2023, approximately 4.3 million crocodilian skins were reported in international trade. While this reflects recovery from the sharp contraction in 2020, it does not represent a return to previous market conditions (Table 1).

Looking more broadly, global trade from 2014 to 2023 averaged approximately 1.41 million skins annually, with a general downward trend over that period. The decline is not uniform across species or regions, but the direction is consistent.

The data also highlights a shift in the composition of the market:

- American alligator (*Alligator mississippiensis*) has remained relatively stable, averaging close to 500,000 skins annually over the past decade
- Nile crocodile (*Crocodylus niloticus*) continues to be a major contributor, averaging roughly 250,000 skins annually
- Caiman trade, once the largest driver of volume, has declined significantly as the market moves toward higher-value materials
- Siamese crocodile (*Crocodylus siamensis*) showed a sharp increase in 2022 driven largely by exports from Viet Nam, illustrating how production from a single country can influence global volumes

Over the 10-year period, “classic” crocodilian skins averaged approximately 929,000 annually, while caiman skins averaged approximately 483,000. What this tells us is straightforward. The industry is not simply shrinking. It is changing. The move away from high-volume, lower-value production toward lower-volume, higher-value skins reflects both market demand and economic reality. Luxury brands are prioritizing quality, consistency, and traceability. That shift has implications for how different species and production systems are valued.

It is also important to acknowledge the limitations of the data itself. The IACTS report notes ongoing issues with incomplete reporting, inconsistencies between exporting and importing countries, and the use of permits rather than actual trade in some cases. These factors can distort short-term interpretation and reinforce the need for continued improvement in reporting and traceability.

Table 1. Direct, commercial global exports for skins from the main taxa, 2014-2023 (as per Table 2 from Caldwell, 2025)

Taxon	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Alligator mississippiensis	485,884	428,521	553,371	463,466	596,258	507,496	472,822	449,191	552,259	464,455
Crocodylus acutus	2,262	3,353	3,233	5,040	5,295	8,187	2,291	1,697	5,671	894
Crocodylus moreletii	2,031	1,291	1,640	3,000	4,088	421	0	200	2,062	170
Crocodylus niloticus	282,859	278,094	317,121	250,150	230,312	260,239	159,967	238,473	230,314	219,638
Crocodylus novaeguineae	24,982	39,070	14,022	7,649	8,790	8,023	2,192	2,445	1,408	1,972
Crocodylus porosus	67,979	69,470	102,759	72,171	75,774	67,510	42,913	50,752	58,047	64,078
Crocodylus siamensis	48,557	58,558	33,349	35,407	55,825	19,761	48,495	70,830	432,241	209,281
Subtotal of 'classic' skins	**914,554**	**878,357**	**1,025,495**	**836,883**	**976,342**	**871,637**	**728,680**	**813,588**	**1,282,002**	**960,488**
Caiman crocodilus crocodilus	35,196	30,594	22,328	41,402	41,071	17,251	6,732	3,788	8,186	5,990
Caiman crocodilus fuscus	738,401	530,357	368,515	315,338	370,807	365,957	244,569	316,230	477,909	299,891
Caiman latirostris	8,893	8,610	5,525	3,652	2,811	3,909	10,356	2	4	0
Caiman yacare	94,456	128,203	52,709	65,243	31,953	43,956	13,509	22,227	69,705	21,379
Melanosuchus niger	290	584	0	0	1,044	0	0	0	0	528
Subtotal of caiman skins	**877,236**	**698,348**	**449,077**	**425,635**	**447,686**	**431,073**	**275,166**	**342,247**	**555,804**	**327,788**
Grand total	1,791,790	1,576,705	1,474,572	1,262,518	1,424,028	1,302,710	1,003,846	1,155,835	1,837,806	1,288,276

Policy and Trade Environment
The operating environment for the crocodilian industry remains highly sensitive to regulatory decisions.

The California ban and its subsequent reversal demonstrated that science-based arguments and documented conservation success can prevail when clearly presented. At the same time, the CITES trade suspension on Mexico in 2023 showed how quickly disruption can occur and how broadly it can impact supply chains, even when most participants are fully compliant.

These events reinforce a key point. The industry cannot afford to be passive in policy discussions. Engagement must be consistent, informed, and proactive.

Role and Engagement of the CSG Industry Group
The Industry Group plays a critical role in ensuring that conservation discussions remain grounded in real-world application. Its value lies in the fact that its members are directly involved in the legal management, production, and trade of crocodilian species. This includes farming, wild harvest, processing, manufacturing, and distribution. Collectively, the group represents decades of practical experience operating within CITES and national regulatory frameworks, with direct accountability to both compliance systems and market realities.

This perspective is essential. Much of the success seen in crocodilian conservation today is the result of systems that have been implemented, tested, and refined over time through this intersection of science, policy, and industry.

The Industry Group is positioned to contribute in several meaningful ways. First, there is a clear role in policy and position development. The group can help articulate how regulated systems such as wild harvest, ranching, and farming actually function, and why they deliver conservation outcomes. This includes providing clarity around distinctions between production systems and helping ensure that discussions at the CSG level reflect operational realities, not just theoretical frameworks.

Second, the group has an important role in improving trade literacy and regulatory understanding. CITES is often misunderstood, even among well-informed stakeholders. Industry participants are uniquely positioned to explain how permitting, tagging, non-detriment findings, and compliance systems work in practice. Developing clear, accessible guidance in this area would benefit not only policymakers but also researchers, enforcement agencies, and conservation partners.

Third, there is an opportunity to contribute more actively to traceability and best practices. Industry operates within structured chain-of-custody systems that are already among the most robust in wildlife trade. Sharing this expertise more broadly, including updates to best practices in animal welfare, environmental management, and recordkeeping, would strengthen alignment across range states and production systems.

The group also has a role beyond commercially traded species. There is value in supporting non-commercial species conservation, whether through sharing lessons learned, contributing to species action plans, or helping connect technical expertise across regions.

Finally, one of the most important roles is translation and communication. The systems that underpin crocodilian conservation are complex. If they are not clearly explained, they are easily misunderstood. The Industry Group can help bridge that gap by translating technical frameworks into language that policymakers, brands, and the public can understand.

Despite this potential, there is a clear need for greater engagement within the group.

At present, participation is uneven. A relatively small number of members are consistently contributing to discussions, initiatives, and outputs. Expanding that participation is essential. The strength of the Industry Group depends on the diversity and depth of experience within it. This includes:

- More active sharing of data, case studies, and regional perspectives
- Greater involvement in developing guidance documents and position papers
- Increased participation in CITES and policy-related discussions
- Stronger coordination around communication and messaging

The Industry Group is not intended to represent individual businesses or commercial interests, but rather to contribute individual expertise in support of broader conservation goals. That distinction is important, and it reinforces the credibility of the group within the CSG structure.

There is a clear opportunity to build on this foundation. With stronger engagement and more structured output, the Industry Group can play a more influential role in shaping both policy and perception, while continuing to support the conservation outcomes that define this sector.

Communication and Outreach
One of the most important developments since the last report has been a shift toward more intentional and visible communication. At CITES COP20 in Uzbekistan, the side event "Scales of Success: How CITES Saved the American Alligator" provided a strong example of what effective communication can look like at a global level. The event featured a screening of the documentary film followed by remarks from Dr. Grahame Webb, ex-Chair of CSG, and Dr. Alejandro Larriera, current Co-Chair. Both speakers reinforced a central message. The recovery of the American alligator is not an isolated case. It is a model that works and can be applied elsewhere when supported by science, regulation, and market value. The response to the event made it clear that there is strong interest in these stories when they are presented clearly and credibly. It also highlighted a gap. Many of the most successful conservation programs in the world are not well understood outside of a small group of experts. Closing that gap is now a priority. In addition to the film, there has been increased engagement with media, brands, and partner organizations to ensure that information about crocodilian conservation and trade is accurate and accessible. This includes collaboration with groups such as Origins Foundation, ICFA, and IUCN SULi, as well as direct outreach to journalists and industry stakeholders.

CSG Co-Chair Alejandro Larriera, Past Chair Grahame Webb, and Industry Chair Christy Gilmore presenting on crocodilian conservation at CITES COP20 in Uzbekistan, 2025, alongside Ms. Ivonne Higuero, CITES Secretary-General; Mathias Lörtscher, former Chair of the CITES Animals Committee; Mr. Ron Schindler of the U.S. Fish and Wildlife Service; and Mr. Buddy Baker of the Association of Fish and Wildlife Agencies.

Opportunities and Priorities
Despite these challenges, there are clear opportunities. Wild harvest programs, in particular, have an opportunity to be repositioned as premium, conservation-driven materials. These programs deliver measurable environmental benefits and should be recognized as such in the marketplace. There is also an opportunity to strengthen direct relationships with brands. Better understanding at the brand level leads to better decision-making and more stable demand. Improving traceability and transparency will continue to be important, not only for compliance but also for building confidence with both regulators and consumers. Finally, there is a need to continue investing in communication. The industry must be able to explain what it does, why it matters, and how it contributes to conservation in a way that is clear and credible.

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Date prepared: 4 April 2026