EXPORT SAINT LUCIA

# NATIONAL EXPORT STRATEGY

## 2026–2030



## Empowering Local Businesses For Global Reach


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# LIST OF ACRONYMS

| Acronym | Meaning |
|---|---|
| ACP | African, Caribbean, and Pacific Group of States |
| AI | Artificial Intelligence |
| CARICOM | Caribbean Community |
| CARIFORUM | Caribbean Forum of ACP States |
| CDB | Caribbean Development Bank |
| CSME | CARICOM Single Market and Economy |
| EPA | Economic Partnership Agreement |
| ESL | Export Saint Lucia |
| EU | European Union |
| FDI | Foreign Direct Investment |
| GDP | Gross Domestic Product |
| GOSL | Government of Saint Lucia |
| GVC | Global Value Chain |
| ICT | Information and Communication Technology |
| IOT | Internet of Things |
| ITC | International Trade Centre |
| MEL | Monitoring, Evaluation, and Learning |
| MSMEs | Micro, Small and Medium Enterprises |

# LIST OF ACRONYMS

| Acronym | Meaning |
|---|---|
| MTDS | Medium-Term Development Strategy |
| NEC | National Export Council |
| NES | National Export Strategy |
| NGO | Non-Governmental Organization |
| ODA | Official Development Assistance |
| OECD | Organisation for Economic Co-operation and Deve |
| OECS | Organisation of Eastern Caribbean States |
| PPPs | Public-Private Partnerships |
| SDGs | Sustainable Development Goals |
| SLASPA | Saint Lucia Air and Sea Ports Authority |
| SLHTA | Saint Lucia Hospitality and Tourism Association |
| SMEs | Small and Medium Enterprises |
| WTO | World Trade Organization |

# FOREWORD

The National Export Strategy 2026–2030 marks an important juncture in Saint Lucia's development journey, reflecting the country's collective ambition to build a more competitive, resilient, and inclusive economy. In a global environment increasingly characterized by volatility, technological transformation, shifting geopolitical alliances, and mounting climate-related pressures, the ability to engage effectively in trade has become not only a vehicle for economic growth but a critical foundation for long-term national resilience and prosperity.



The revised Strategy builds upon the achievements and lessons of the NES 2020–2024, incorporating the experiences of stakeholders across the public and private sectors, the emerging realities of new markets, and the evolving dynamics of production, consumption, and competition at regional and international levels.

Trade remains central to Saint Lucia's vision of transformation, offering pathways for entrepreneurship, innovation, and employment, and reinforcing the country's ability to participate meaningfully in global and regional value chains.

However, building a sustainable and dynamic export sector requires more than ambition. It demands clarity of direction, coordinated action, strategic investments in capacity and infrastructure, and a willingness to adapt to the demands of an increasingly interconnected and rapidly changing world. The National Export Strategy responds to this imperative with a structured, evidence-based plan that balances aspiration with pragmatism, leveraging Saint Lucia's strengths while addressing long-standing structural vulnerabilities that have historically constrained export performance.

The Strategy is grounded in a commitment to inclusivity, sustainability, and future-readiness. It acknowledges the critical role of micro, small, and medium enterprises (MSMEs), the creative and digital economies, and the potential of youth, women, and rural communities to drive the next wave of export growth. It recognizes that resilience must be built into the very fabric of export development—whether through climate smart production, diversifed market

engagement, digital trade integration, or the continuous strengthening of institutional capacity.

It aligns closely with Saint Lucia's national development priorities, regional integration aspirations under the OECS and CARICOM frameworks, and international commitments under the World Trade Organization (WTO), the Economic Partnership Agreement (EPA) with the European Union, and the Sustainable Development Goals (SDGs).

The National Export Strategy 2026–2030 is therefore both a blueprint and a commitment: a blueprint for expanding and deepening Saint Lucia's participation in global trade, and a commitment to ensuring that the benefits of export growth are broad-based, inclusive, and sustainable. It invites every stakeholder—government institutions, private sector actors, development partners, and the Saint Lucian diaspora—to play an active role in advancing a more competitive, innovative, and resilient national economy. The Strategy challenges us not only to compete but to lead where we have strengths, to innovate where there are gaps, and to collaborate across sectors and borders to secure Saint Lucia's place in a future defined by opportunity as much as by change. In doing so, it reaffirms Saint Lucia's readiness to meet the demands of the new global economy with purpose, adaptability, and unwavering resolve.

**Driving Saint Lucia's export growth through resilience, innovation, and opportunity**



# EXECUTIVE SUMMARY

The National Export Strategy (NES) 2026–2030 is Saint Lucia's blueprint for transforming its export economy into a resilient, diversified, and innovation-driven engine of sustainable development. This revision builds upon the achievements of the NES 2020–2024 while responding to significant shifts in global trade, national development priorities, and stakeholder expectations. The COVID-19 pandemic, disruptions to global supply chains, emerging digital trade platforms, and accelerating climate risks have fundamentally changed the operating environment for small economies.

Saint Lucia's NES revision embraces these realities — positioning the country to compete effectively in a more volatile, digital, and sustainability-conscious world. The strategy is the product of a collaborative, inclusive process and the perspectives of a broad stakeholder group. Their insights have shaped a future-fit, action-oriented plan that places resilience, innovation, competitiveness, and social inclusion at its core.

Building an agile, inclusive, and future-ready export sector



# Summary of NES 2020–2024 Performance



The NES 2020–2024 cycle delivered important gains despite unprecedented global challenges:

- Expansion of export-ready enterprises, particularly among SMEs.
- Increased inter-agency collaboration in export promotion and market access.
- Initial steps toward digitalizing trade facilitation processes.
- Strengthened visibility of Saint Lucian products and services in regional and niche markets.

However, stakeholder consultations revealed critical areas requiring further action:

- **Limited sectoral depth:** Export growth concentrated in a few traditional sectors, with untapped potential in value-added niches.
- **Access to finance barriers:** Exporters, particularly MSMEs and emerging sectors, faced difficulties in securing trade finance and investment support.
- **Market concentration risk:** Heavy reliance on a narrow group of markets exposed exporters to external shocks.
- **Gaps in innovation and technology adoption:** Digitalization, green trade readiness, and product innovation remain underdeveloped.
- **Coordination and resource mobilization challenges:** Fragmentation among implementing agencies slowed delivery of some strategic interventions.

The NES 2026–2030 directly addresses these gaps with a more integrated, future-ready approach.



# Vision for the Future

Uniquely Saint Lucian with global appeal

# Key Strategic Shifts

The NES 2026–2030 embraces three decisive shifts to future-proof Saint Lucia's export sector:

### From Fragmented Initiatives to Integrated Ecosystems

Export growth will be driven by coherent sector ecosystems, connecting production, processing, logistics, marketing, and financing — building value chains, not isolated interventions.

### From Traditional Market Access to Strategic Global Positioning

- Building on existing intelligence-led market development efforts, the NES 2025–2029 intensifies Saint Lucia's focus on targeted global positioning.
- Export promotion will be guided by proactive market research, sectoral branding, and strategic penetration into high-potential, emerging, and non-traditional markets, enhancing competitiveness beyond regional and traditional boundaries.

### From Basic Facilitation to Leadership in Resilience, Innovation, and Sustainability

Exporters will be supported to adopt climate-smart production, green certifications, digital transformation tools, and innovation-driven models to enhance competitiveness and market resilience.

These shifts reflect a strategic repositioning — Saint Lucia is not only seeking to participate in global trade, but to compete and thrive within it.

# Strategic Priorities

**The NES 2026–2030 focuses on sectors with high-value growth and diversification potential:**



## Tourism, MICE & Experiential Services

Expanding eco-tourism, cultural tourism, business events (MICE), and high-value lifestyle experiences including wellness, retreats, and executive gatherings.



## Agro-Processing and Functional Foods

Promoting climate-resilient, value-added agricultural exports and tapping into wellness and organic product markets.



## Creative Industries

Leveraging Saint Lucia's cultural wealth in music, film, fashion, and design for regional and global export.



## ICT and Digital Services

Growing technology-driven exports including digital marketing and online education and consulting services.

# Emerging Subsectors

The NES 2026–2030 embraces three decisive shifts to future-proof Saint Lucia's export sector:

**1. Future Growth Driver**

- Green exports, health and wellness services, and digital cultural products are identified as high-potential future drivers.

2. **Cross-Cutting Enablers**

- **Trade Facilitation and Logistics Modernization** — improving customs efficiency, logistics infrastructure, and digital trade systems.
- **Export Finance Access and Risk Management** — strengthening trade credit, guarantee schemes, and blended finance facilities.
- **Innovation, Digitalization, and Quality Infrastructure** — fostering innovation hubs, digital tools for exporters, and quality certification support.
- **Skills Development for Export Readiness** — aligning training and education with sector export needs, including digital skills and entrepreneurship

**3. Inclusion Focus**

- The strategy prioritizes inclusion of women-led businesses, youth entrepreneurs, rural producers, and micro and small enterprises — ensuring that the benefits of export growth are distributed broadly and equitably across Saint Lucia.

**4. Sports and Entertainment Services**

- Positioning sports, athlete branding, and sport-linked experiences as emerging export offerings through sports diplomacy, merchandise, and sports tourism.


National Priority Export Sectors
Services
ICT & Digital Services
Knowledge & Professional services
Sports & Entertainment Services
Creative & cultural Industries
Digital creation
Fashion
Film & Audio Visual
Agro-processing/food & beverage
Organic foods
Functional foods
Artisanal beverages
Tourism
Digital tourism
Sports Tourism
MICE & Business Events
Events Tourism
Cultural heritage & Community based tourism
Health & Wellness
Eco & Adventure tourism

# Sustainability, Resilience, and Innovation Outlook

The NES 2026–2030 embeds resilience, sustainability, and innovation as core principles, not optional layers.

Strategic sustainability actions include:

- Building climate-smart agricultural and tourism value chains.
- Supporting enterprises to achieve green certifications (organic, fair trade, sustainable tourism labels).
- Facilitating access to climate finance, green investment funds, and blended financing mechanisms.
- Strengthening adaptive capacity through export risk management, scenario planning, and resilient infrastructure investments.
- Promoting innovation through research, digital platforms, and public-private collaboration.

This integrated approach ensures that Saint Lucia's exporters are positioned not only to survive but to adapt to a changing global economy that increasingly values authenticity, sustainability, and innovation.



# Strategy Dashboard

The NES will track progress through a practical, action-oriented Strategy Dashboard:

| Component | Focus Areas | Sample KPIs |
|---|---|---|
| Priority Sectors | Tourism, Agro-Processing, Creative Industries, ICT | • Sector-specific export growth rates;<br>• Number of new certified export products;<br>• Number of new market entries |
| Cross-Cutting Enablers | Trade Facilitation, Export Finance, Innovation, Skills Development | • Reduction in customs clearance times;<br>• Percentage of SMEs accessing export finance;<br>• Number of exporters trained in digitalization |
| Sustainability and Inclusion | Green Exports, Women and Youth Inclusion | • Number of climate-certified exports;<br>• Percentage of supported exporters that are youth- or women-owned;<br>• Amount of climate finance mobilized for exporters |

Monitoring will be conducted quarterly and bi-annually using a Traffic Light Reporting System, with a formal mid-term review in 2028 to allow for adaptive strategy management.

The NES 2026–2030 offers a bold, pragmatic, and future-ready roadmap for Saint Lucia's economic transformation — ensuring that export growth becomes a driver of national prosperity, social inclusion, resilience, and innovation.

# Strategic Framework Overview

## vision

## Strategic Objectives

Buy-in

Awareness

Accountability

- Strengthen sectoral competitiveness
- Expand and diversify market access
- Enhance trade facilitation and the business environment
- Promote export oriented entrepreneurship and MSME participation
- Strengthen the trade support ecosystem and institutional coordination
- Embed sustainability, innovation, and resilience across export sectors

## Priority Sectors & Enablers

- Tourism
- Agro-processing /Food & Beverage
- Creative and Cultural Industries
- ICT & Digital Services
- Services

- Trade facilitation
- Export Finance and insurance
- Quality Infrastructure
- Innovation
- Skills
- Renewable energy

### Implementation Framework

- Institutional roles and responsibilities
- Implementation phasing
- Bi-annual review cycle
- Resource mobilization

### Monitoring, Evaluation and Learning

- Traffic light reporting system
- Mid-term review and adaptive management

# INTRODUCTION

Trade remains a cornerstone of Saint Lucia's economic transformation agenda, acting as a catalyst for growth, innovation, private sector development, and sustainable livelihoods. The National Export Strategy (NES) 2020–2024 made important strides in enhancing competitiveness, sectoral value addition, and market outreach. However, shifting global dynamics—including increased geopolitical volatility, tightening regulatory environments, accelerating digital disruption, and intensifying climate risks—require a recalibrated and future-ready response. The NES 2026–2030 is therefore conceived as a continuation and evolution: building on past achievements while addressing structural vulnerabilities such as small production scales, high logistics costs, skill gaps, limited digital infrastructure, and narrow sectoral concentration. It incorporates lessons learned from the previous NES cycle, extensive stakeholder consultations, and emerging opportunities in high-value services, green trade, and digital commerce, while remaining grounded in the realities of a complex, uncertain, and highly competitive global environment.



Trade plays a vital role not only in Saint Lucia's GDP performance but also in unlocking broader objectives such as private sector resilience, inclusive economic empowerment, rural and youth entrepreneurship, and diversification beyond tourism dependence. A dynamic export sector generates critical foreign exchange, supports rural livelihoods, drives technology transfer, builds resilience against external shocks, and embeds Saint Lucia more competitively within regional and global value chains. By strengthening the links between trade, productive sectors, and innovation ecosystems, the NES seeks to support Saint Lucia's transition toward a diversified, climate-smart, knowledge-driven economy.





The NES is explicitly aligned with Saint Lucia's Medium-Term Development Strategy (MTDS) and sectoral transformation goals. Regionally, it reinforces commitments under the OECS Regional Integration Agenda, CARICOM Single Market and Economy (CSME) pillars, and the CARICOM Regional Digital Strategy. Internationally, it reflects Saint Lucia's obligations and opportunities under the World Trade Organization (WTO) agreements, the Economic Partnership Agreement (EPA) with the European Union, and the Sustainable Development Goals (SDGs), particularly in promoting decent work, innovation, climate resilience, and partnerships for sustainable trade. This alignment ensures strategic coherence across national, regional, and international policy spheres.

The scope of the NES 2026–2030 is deliberately broad, recognizing that modern trade increasingly blurs traditional sector boundaries. It encompasses goods exports—including both traditional strengths and emerging agro-innovation segments—services exports such as tourism, cultural and creative industries, professional services, and digital services, cross-border digital trade platforms, e-commerce, and non-traditional and frontier sectors including green technologies, renewable energy-linked services, and health and wellness-based exports

While Saint Lucia must accelerate diversification into these emerging spaces, the NES acknowledges that capacity-building, investment attraction, institutional upgrading, and phased market development will be critical to converting potential into sustained export readiness.

> Trade is not just a driver of growth — it is a catalyst for resilience, innovation, and shared prosperity

The objectives of the NES revision are therefore focused and pragmatic: to accelerate export competitiveness by improving product quality, branding, compliance, and innovation; to expand and diversify Saint Lucia's presence in regional and global markets while managing exposure to geopolitical volatility; to strengthen trade support functions such as logistics, certification, financing, and digital access; to foster innovation-driven, technology-enabled export sectors; to promote inclusive trade participation across MSMEs, women, youth, and rural communities; and to embed resilience measures that ensure Saint Lucia's export sector remains agile, shock-resistant, and globally competitive even in an era of disruption. The revised NES reflects a clear recognition that sustained export growth is not automatic: it must be strategically nurtured through deliberate policy coherence, institutional coordination, private sector partnership, and continuous capacity-building, positioning Saint Lucia to navigate complexity while capitalizing on opportunity.



# METHODOLOGY




The development of the National Export Strategy 2026–2030 was anchored in a methodologically rigorous, structured, and evidence-based process designed to ensure that the resulting strategic framework is both reflective of national realities and responsive to the evolving dynamics of regional and international trade. The methodology combined targeted stakeholder engagement, in-depth desk review and secondary data analysis, and the application of internationally recognized analytical tools to produce a comprehensive and forward-looking export strategy.

## STAKEHOLDER ENGAGEMENT

Stakeholder engagement was a central element of the NES revision process, aimed at capturing a broad spectrum of perspectives from across Saint Lucia's trade ecosystem. Structured interviews and focused consultations were conducted with representatives from public sector agencies, private sector organizations, and trade-related institutions critical to trade facilitation, export promotion, policy formulation, and sectoral development. While the initial engagement plan envisioned consultations with a wide cross-section of stakeholders, including MSMEs, youth entrepreneurs, and academic institutions, scheduling and operational constraints led to a more targeted engagement approach centered on key agencies and sector representatives. The consultation process provided valuable insights into institutional strengths and gaps, sectoral priorities, trade facilitation challenges, and emerging opportunities, all of which informed the diagnostic assessment and strategic orientation of the revised National Export Strategy.



Where direct consultations with certain groups such as MSMEs, youth organizations, women entrepreneurs, and academic institutions were not feasible within the consultation window, insights were drawn indirectly through representative organizations and existing stakeholder mappings.

Complementing the stakeholder engagement process, a comprehensive desk review was undertaken, drawing upon a wide array of sources including the previous NES 2020–2024, sectoral policy frameworks, Saint Lucia's Medium-Term Development Strategy (MTDS), trade performance datasets from 2018–2024, the Economic and Social Review 2023, tourism satellite account data, regional integration reports, and international trade intelligence platforms. This secondary research provided the empirical foundation for assessing Saint Lucia's trade environment, sectoral strengths and weaknesses, competitiveness gaps, and emerging global and regional trends.



## METHODOLOGICAL APPROACH

**A structured, evidence-based process combining stakeholder insights, rigorous analysis, and strategic foresight to guide Saint Lucia's export transformation.**

A multi-layered analytical framework was applied to strengthen the strategic diagnosis. At the macro level, a PESTLE analysis examined the political, economic, social, technological, legal, and environmental factors shaping Saint Lucia's trade competitiveness. Scenario planning was guided by global trade trend reviews, regional economic outlooks, and climate-related risk forecasts, allowing for the construction of plausible future states encompassing base, optimistic, and pessimistic export growth scenarios.

The VUCA framework informed the identification of volatility, uncertainty, complexity, and ambiguity risks relevant to the Saint Lucian export sector. At the sectoral level, SWOT analyses were developed for priority goods and services sectors to assess internal capacities and external market positioning. Porter's Five Forces analysis provided sector-specific competitiveness insights, while value chain and cluster analyses mapped value creation bottlenecks and opportunities for deeper domestic and regional integration.



## METHODOLOGICAL APPROACH

A blended, future-focused methodology grounded in global best practices, rigorous analysis, and strategic foresight to guide Saint Lucia's export transformation

Trade performance and competitiveness were assessed using the International Trade Centre's Strategic Trade Development Roadmap (STDR) model, focusing on revealed comparative advantage, export diversification, market penetration, and trade support function gaps. Border efficiency and regulatory readiness were evaluated using OECD Trade Facilitation Indicators (TFIs). Institutional diagnostics drew upon the McKinsey 7-S Framework to assess strategic coherence, coordination mechanisms, and capacity gaps across export support agencies. Resilience assessments, drawing on UNDP and OECD models, evaluated financial, infrastructural, and institutional resilience, critical for sustaining trade performance amid external shocks.

Throughout the methodology, triangulation was emphasized, cross-referencing stakeholder insights, secondary data trends, and diagnostic outputs to validate findings, reconcile discrepancies, and enhance the robustness of the strategic recommendations. Particular attention was paid to ensuring that the NES remains realistic, future-oriented, and adaptable, embedding flexibility to accommodate evolving trade conditions and external shocks.

The diagnostic review and stakeholder consultations affirmed the continuing relevance of Saint Lucia's priority sectors. Accordingly, the approach to sector prioritization for the NES 2025–2029 was guided by the following principle to build on existing sectoral strengths through evidence-based refinement, future-fit adaptation, and strategic diversification, ensuring that Saint Lucia's export development efforts remain resilient, competitive, and aligned with emerging global opportunities.

In revising the National Export Strategy, the approach adopted was to build upon the strong foundations established in the NES 2020–2024, rather than fundamentally reconfigure Saint Lucia's priority sectors. Consultations confirmed that the sectors identified previously remain largely relevant to the country's economic structure, export potential, and development ambitions. The revision process therefore focused on deepening, repositioning, and refining these sectors to better align with prevailing global dynamics, emerging opportunities, and evolving competitiveness challenges. This approach ensures strategic continuity where justified, while making the NES 2026–2030 more adaptive, future-focused, and resilient to the structural changes and external shocks expected to shape global trade in the decade ahead.

While the methodology was designed to be as comprehensive as possible, limitations are acknowledged. Direct consultations with certain stakeholder groups, including MSMEs, youth representatives, and women entrepreneurs, were constrained, and data gaps remain in emerging sectors such as digital trade, e-commerce readiness, and certain services sub-sectors. Furthermore, the rapid evolution of geopolitical and global market conditions underscores the importance of maintaining continuous monitoring and adaptive management within the implementation phase of the NES.

In sum, the methodology underpinning the NES 2026–2030 reflects a deliberate commitment to structured engagement, evidence-based analysis, strategic foresight, and resilience planning. It provides a credible, pragmatic, and comprehensive foundation for advancing Saint Lucia's export ambitions in an increasingly complex and competitive global environment.



# REVIEW OF NES 2020–2024

***Evaluating progress, lessons, and future opportunities for trade***

## Implementation Performance

The implementation of the National Export Strategy 2020–2024 unfolded against a backdrop of considerable global and national challenges, notably the economic disruptions caused by the COVID-19 pandemic, evolving geopolitical tensions, climate-related events, and shifts in global trade dynamics. Despite these headwinds, progress was recorded across several sector-specific and cross-cutting priority areas, although implementation outcomes were uneven and in some instances delayed or scaled back relative to initial ambitions.

**Measured progress achieved despite global disruptions, underscoring the resilience and adaptability of Saint Lucia's export development efforts**

Within the sectoral priorities, notable headway was achieved in tourism, food and beverage, and to a more limited extent, in creative industries. In tourism, efforts to diversify beyond traditional offerings were evident through increased investment in community tourism initiatives, digital marketing strategies targeting new demographics, and early steps toward developing yachting and marine-related tourism services. Data from the 2023 Tourism Satellite Account indicates that while inbound visitor spending remained heavily concentrated in traditional accommodation and hospitality services, new tourism niches, including wellness-oriented activities, began to contribute incrementally to tourism GDP.



In the food and beverage sector, specific initiatives supporting agro-processing, value addition, and certification of export-ready products were launched. Export data between 2019 and 2024 reflects moderate growth in agro-processed goods, particularly in niche products such as artisanal beverages and value-added foods, although structural challenges related to logistics, standards compliance, and limited economies of scale constrained full market expansion.





The creative and cultural industries sector made initial progress in promoting local content and building awareness of export potential, but significant gaps in institutional support, digital infrastructure, and regional market penetration limited broader sector activation, a reality also reflected in the limited share of creative exports captured in available trade data.

Cross-cutting enablers, particularly in trade facilitation and quality infrastructure, saw partial progress. Efforts to streamline customs procedures through digital platforms advanced incrementally, supported by initiatives within the Customs and Excise Department. However, the full implementation of a national single window system and expanded export finance mechanisms remained limited in scope, challenges echoed in stakeholder consultations and reflected in the constrained diversification of export markets beyond traditional partners such as the United Kingdom and Barbados during the 2019–2024 period.

Data from seaport and cargo movement records further highlights the fragility of trade logistics, with fluctuations in cargo throughput during the pandemic years underscoring the vulnerability of export channels to external shocks.

Alignment of interventions with shifting global dynamics was mixed. The NES 2020–2024 was conceived prior to the full impact of the COVID-19 pandemic and the subsequent acceleration of digital trade, shifts in tourism demand patterns, heightened supply chain vulnerabilities, and the emergence of new sustainability and climate-linked trade standards. While some tactical adjustments were made during implementation—such as increased digital marketing for tourism exports and continued discussions on e-commerce—overall, the strategy's operational response to these global shifts was constrained by limited institutional agility, resource challenges, and the absence of an integrated resilience framework within the original NES design.

Export performance indicators for emerging sectors such as digital services and creative industries show minimal growth over the period, pointing to missed opportunities in adapting more aggressively to global trade transformations.

In sum, the implementation of the NES 2020–2024 demonstrated that while Saint Lucia remains committed to export-led growth, sustained and adaptable execution will be critical to realizing its full potential. The progress made under difficult circumstances provides a foundation upon which the revised NES 2026–2030 can build, particularly by embedding greater flexibility, strategic foresight, and resilience in sectoral and cross-cutting initiatives.



# Institutional Effectiveness and Coordination

The effective implementation of the National Export Strategy 2020–2024 was supported by the sustained engagement of national institutions, public agencies, and private sector stakeholders. Over the course of implementation, important foundations for collaboration were established, and progress was made in promoting greater alignment between export development objectives and sectoral initiatives. At the same time, the experience underscored areas where institutional coordination mechanisms and operational capacities could be further strengthened to fully realize the intended outcomes of the Strategy.

Export Saint Lucia served as the principal implementing agency, delivering direct support to exporters through capacity-building initiatives, market intelligence, trade promotion activities, and branding strategies for key sectors. These efforts contributed to greater exporter visibility in regional and international markets and improved awareness of export opportunities across both traditional and emerging sectors. However, resource limitations, including human capital constraints and restricted access to finance, affected the agency's ability to scale interventions and deepen engagement in new and evolving trade areas such as digital commerce, value-added services, and green exports. Despite these challenges, Export Saint Lucia maintained a central and catalytic role throughout the NES implementation period, adapting to changing conditions and sustaining focus on export development priorities.

The National Export Council (NEC) provided a valuable platform for multi-stakeholder dialogue and strategic oversight, marking a significant step toward fostering a coordinated national approach to export development. The Council convened a wide cross-section of public and private sector actors and facilitated important exchanges of knowledge and policy perspectives. However, sustaining consistent momentum in driving cross-agency action reflected broader systemic challenges. Limited technical support structures, overlapping mandates across institutions, and evolving sectoral priorities affected the overall coordination and operational effectiveness of the institutional framework supporting NES implementation. Strengthening the NEC's institutional anchoring, formalizing inter-agency collaboration protocols, and enhancing technical secretariat support would contribute significantly to improving strategic coherence and accelerating the delivery of future export development initiatives.

Line ministries and sector-specific agencies contributed to advancing NES objectives within their respective mandates, particularly in areas such as tourism promotion, agro-processing support, quality assurance, and investment facilitation. Nonetheless, the degree of alignment between sectoral policies and NES strategic priorities varied, reflecting the broader complexity of embedding export development as a cross-cutting national objective. Strengthening policy coherence, mainstreaming export facilitation across sectoral strategies, and enhancing inter-ministerial coordination remain important areas for continued enhancement to ensure more integrated and strategic sectoral contributions to national export growth.

The private sector, represented through organizations such as the Chamber of Commerce, the Manufacturing Association, and other non-state actors, played an active role in advocacy, capacity development, and market access facilitation. Public-private engagement frameworks matured during the implementation period, contributing to a stronger culture of dialogue and joint problem-solving. However, opportunities exist to deepen structured consultation processes, strengthen feedback loops, and expand support to a wider array of exporters, including MSMEs and firms operating in emerging sectors, to ensure that private sector perspectives are systematically integrated into national export policies and programs.

Capacity and resource considerations were consistent themes across the institutional landscape. Funding allocations for export development activities were often fragmented or reliant on external sources, limiting institutional agility and responsiveness to emerging market opportunities or external shocks. Specialized technical expertise in areas such as trade finance, e-commerce regulation, logistics management, and resilience planning remained limited, affecting the scope and depth of program delivery in several strategic sectors. These realities reinforce the importance of sustained investment in institutional strengthening, human capital development, and strategic resource mobilization to support effective execution of the NES moving forward.

The implementation of the NES 2020–2024 must also be viewed within the broader context of Saint Lucia's national development landscape and the inherent challenges faced by small island developing states in advancing complex trade and competitiveness agendas. Structural constraints such as limited productive scale, constrained fiscal space, small domestic market size, vulnerability to external shocks, and human capital gaps present significant headwinds to achieving rapid export transformation. Within a five-year period, the ambition to diversify exports, strengthen value chains, build institutional capacity, and penetrate new markets represents a formidable undertaking, even under stable global conditions. The NES implementation period coincided with a series of extraordinary global disruptions, including the COVID-19 pandemic, heightened geopolitical volatility, and accelerated shifts in global trade patterns, which further compounded existing challenges. The alignment of the NES 2020–2024 with Saint Lucia's Medium-Term Development Strategy ensured coherence with the country's broader economic planning framework. However, in reflecting on the experience, it is appropriate to consider whether a five-year horizon is sufficient to achieve the scale of structural transformation required to significantly strengthen export competitiveness. As Saint Lucia looks to the future, a broader strategic timeframe, potentially extending beyond five years, may offer a more feasible platform for realizing ambitious export diversification and resilience goals. Any adjustment in the planning horizon would need to be carefully aligned with the evolution of national development frameworks to maintain policy coherence, fiscal sustainability, and institutional capacity. The conclusion of the NES 2020–2024 therefore presents not only an opportunity for objective assessment, but also for strategic reflection on the optimal timeframe required to drive Saint Lucia's long-term trade and development aspirations.

Overall, the NES 2020–2024 implementation experience demonstrates that valuable institutional foundations have been laid for Saint Lucia's export development agenda. Building on these foundations by enhancing coordination mechanisms, improving institutional agility, and deepening strategic partnerships with the private sector will be critical to maximizing the impact of the NES 2026–2030 and positioning Saint Lucia to compete effectively and sustainably in an increasingly complex global trade environment.

# Monitoring, Evaluation, and Data Systems

The effective monitoring, evaluation, and adaptive management of the National Export Strategy 2020–2024 were shaped by the availability of timely and relevant trade data, the use of performance indicators, and the strength of learning mechanisms across implementing institutions. During the NES implementation period, notable efforts were made to enhance the availability of trade and sectoral data to support evidence-based decision-making, although critical gaps remained that limited the full operationalization of a comprehensive monitoring, evaluation, and learning system.

Trade data availability improved incrementally, with institutions strengthening data collection and reporting on goods exports, services, and sector performance. These developments provided a stronger foundation for assessing trends, supporting strategic planning, and informing trade promotion initiatives. However, limitations persisted in areas such as services exports, digital trade activities, and emerging sectors, where disaggregated and real-time data remained limited. The ability to generate comprehensive, multi-sectoral trade intelligence to support dynamic strategy adjustments was therefore constrained.

The use of performance indicators to systematically track NES outcomes was partial. While reporting mechanisms captured operational activities and outputs across key implementing agencies, there was no fully integrated results framework linking these outputs to overarching strategic objectives through a consistent set of measurable indicators. Monitoring was often oriented around project-based deliverables rather than embedded within a unified, outcome-focused national performance management system. This limited the ability to assess the strategic impact of interventions, identify early signals of implementation challenges, and recalibrate approaches where necessary.

The National Action Plan provided a structured framework for assigning responsibilities and guiding NES implementation. Agencies reported progress against assigned activities, contributing to an operational overview of implementation status. However, reporting on the National Action Plan was not always consistent or timely across all institutions, and the aggregation of progress updates remained fragmented. Furthermore, reporting systems were often focused on activity completion rather than strategic outcomes, limiting the ability to systematically assess the broader impact of interventions against NES objectives. The absence of a centralized digital platform for consolidating updates, combined with limited integration of strategic-level indicators, constrained the ability to fully realize adaptive management principles.

Gaps in measurement, reporting, and institutional learning further affected the ability to drive continuous improvement during the implementation period. While internal monitoring structures within agencies captured important operational information, the systematic aggregation, analysis, and strategic use of data across the broader export support ecosystem were limited. The lack of a real-time, integrated trade performance monitoring system constrained the ability to provide timely strategic decision support or course corrections during implementation.

Notwithstanding these constraints, the NES 2020–2024 implementation period laid important foundations for strengthening monitoring, evaluation, and learning systems. Investments in improving trade and sectoral data collection, expanding institutional awareness of performance measurement needs, and strengthening inter-agency data sharing mechanisms provide a platform for future progress. Moving forward, the definition of clear and measurable strategic indicators, the establishment of a centralized trade performance dashboard, the institutionalization of regular strategic review cycles, and the strengthening of analytical capacities across implementing agencies will be essential to delivering an agile, accountable, and continuously evolving export development strategy



# Lessons Learned and Structural Challenges

The implementation of the National Export Strategy 2020–2024 provided valuable insights into the opportunities and constraints that shape Saint Lucia's export development efforts. Reflecting on this experience, several important lessons emerge that are critical for informing the design and execution of the revised NES and for strengthening the resilience, inclusiveness, and competitiveness of Saint Lucia's export ecosystem.

First, the experience underscored the importance of integrated, cross-sectoral implementation approaches. While progress was achieved within individual sectors, full realization of NES objectives was constrained by the limited alignment and coordination of actions across ministries, agencies, and private sector stakeholders. Export development is inherently cross-cutting, requiring the systematic integration of trade facilitation, investment promotion, skills development, innovation, quality infrastructure, and sectoral transformation initiatives. Future success will depend on establishing stronger mechanisms for policy coherence, joint program design, and coordinated execution across the national development landscape.

Second, structural constraints within the export support environment remain significant. Access to trade finance continues to pose a critical bottleneck for many exporters, particularly for micro, small, and medium enterprises seeking to expand production capacity, upgrade quality standards, and penetrate new markets. Existing financing instruments are often limited in scale, risk tolerance, or accessibility relative to the needs of emerging exporters. Similarly, infrastructure gaps, including logistical efficiency, cargo handling capacity, cold chain services, and digital connectivity, affect the competitiveness and reliability of Saint Lucia's exports, particularly in perishable goods and time-sensitive sectors. In services exports, while there have been important advances in tourism, broader support systems for knowledge-based, creative, professional, and digital services remain underdeveloped, limiting the ability of these sectors to scale and internationalize.

Third, institutional coordination and policy alignment are essential for driving strategic export growth. While platforms such as the National Export Council have provided space for dialogue, the full institutionalization of cross-agency collaboration mechanisms, joint monitoring systems, and adaptive strategic planning processes remains a work in progress. Divergences between sectoral strategies and overarching export development priorities at times diluted focus and resource efficiency. Strengthening institutional anchoring, formalizing coordination protocols, enhancing information sharing, and embedding export development objectives more explicitly within sectoral and national planning frameworks will be critical for advancing a more integrated and effective export growth agenda.

Finally, the experience of implementing the NES 2020–2024 reinforces the importance of agility, resilience, and long-term strategic commitment in export development. External shocks such as the COVID-19 pandemic, shifting global trade patterns, and climate-related disruptions demonstrate the need for flexible strategy execution models, diversified market engagement, and sustained investment in capacity-building. Export transformation is a long-term endeavor, requiring not only tactical responsiveness but also steady, strategic investment in the capabilities, systems, and partnerships that underpin competitive participation in the global economy.

These lessons collectively provide a strong foundation for the refinement of strategic priorities, institutional arrangements, and policy tools under the NES 2026–2030. By embracing a more integrated, resilient, and inclusive approach to export development, Saint Lucia can strengthen its ability to navigate complexity, leverage emerging opportunities, and build a more prosperous, sustainable trade future.





# ENVIRONMENTAL SCAN

# Global Trade Trends and Risks

The global trade environment throughout the NES 2020–2024 implementation period was characterized by heightened volatility, shifting power dynamics, accelerated digital transformation, and growing emphasis on climate resilience.

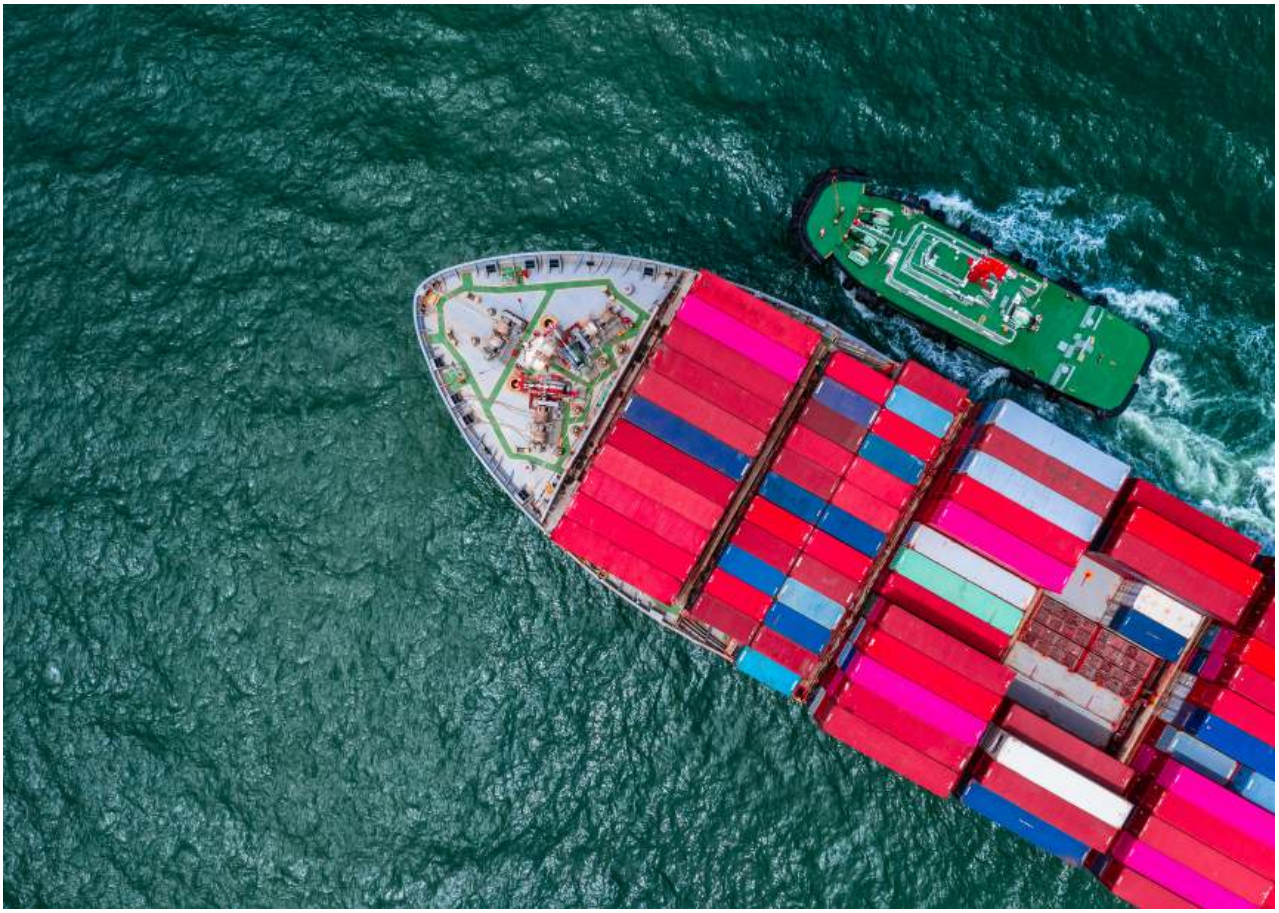
These factors created both opportunities and challenges for small island economies such as Saint Lucia. The COVID-19 pandemic triggered sharp contractions in global trade flows in 2020. The World Trade Organization reported a 5.3 percent decline in merchandise trade volumes that year (WTO, 2021). An uneven recovery followed, marked by supply chain disruptions, surging freight costs, and significant shifts in consumer demand patterns toward digital and sustainable goods and services. By 2022, global trade rebounded, with merchandise trade volumes expanding by 2.7 percent. Services trade also showed notable recovery, particularly in tourism and digital services sectors (UNCTAD, 2023). However, underlying structural fragilities persisted. These included logistical bottlenecks, port congestion, and vulnerability to external shocks. Such fragilities disproportionately impacted small economies with narrow export bases and heavy reliance on maritime transport.

Climate change risks became increasingly central to trade competitiveness during this period. Extreme weather events, rising insurance costs for shipping, and disruptions to agricultural supply chains intensified. UNCTAD warned in its 2022 SIDS report that small island developing states faced systemic trade vulnerabilities exacerbated by environmental instability (UNCTAD, 2022). Geopolitical tensions also escalated between 2020 and 2024. Firms diversified sourcing away from concentrated hubs, traditional multilateral cooperation frameworks weakened, and new regional trade blocs emerged. These developments required agile market diversification strategies. Digital transformation advanced rapidly. E-commerce volumes reached record levels during pandemic-related lockdowns and continued to reshape trade structures in 2023 and 2024. The World Bank's Digital Development Overview (World Bank, 2024) emphasized the growing importance of digital readiness for trade competitiveness.

As Saint Lucia's NES 2020–2024 period concluded, the global outlook for 2025 reflected both continuity and new challenges. The WTO's April 2025 forecast projects that global merchandise trade growth will moderate at 2.6 percent due to persistent geopolitical frictions and a cautious global investment climate (WTO, 2025). Climate-linked regulatory shifts, such as carbon border adjustment mechanisms in major markets, are expected to increasingly shape trade terms.

Heightened global uncertainty in 2025 is further amplified by the imposition of broad-based tariffs by major economies. This is contributing to a reconfiguration of traditional supply chains, the slowing of cross-border investment flows, and the emergence of fragmented regional trade patterns (WTO, 2025; IMF, 2025).

These evolving dynamics have significant implications for the design of a future-fit and responsive National Export Strategy for Saint Lucia. They underscore the urgent need to build greater resilience into export sectors, diversify market access strategies, and strengthen the agility of trade support institutions. Enhancing digital trade readiness, embedding climate resilience measures across export value chains, developing risk mitigation tools such as trade finance instruments, and investing in strategic market intelligence capabilities will be critical to navigating an increasingly fragmented and climate-conscious global trading system. The future NES must move beyond traditional sector promotion models and adopt an integrated approach that positions Saint Lucia's exports competitively in a world shaped by volatility, regulatory shifts, and technological transformation.



# Saint Lucia's Macroeconomic and Competitiveness Outlook

Saint Lucia's macroeconomic performance over the NES 2020–2024 implementation period reflected a dynamic interplay between global shocks, domestic policy responses, and the structural characteristics of a small island developing economy. The onset of the COVID-19 pandemic in 2020 triggered a severe contraction in economic activity, with real GDP declining by an estimated 20 percent, primarily driven by the collapse of tourism and associated sectors (Government of Saint Lucia, Economic and Social Review 2021). Recovery efforts gained momentum from 2021 onward, supported by gradual reopening, targeted fiscal interventions, and renewed external demand. By 2023, preliminary estimates indicated that Saint Lucia's GDP had returned to near pre-pandemic levels, with real growth of 3.8 percent driven by rebounds in tourism, construction, and to a lesser extent, financial and business services (Economic and Social Review 2023).

Despite this recovery trajectory, underlying structural vulnerabilities remained evident. Saint Lucia's economy continued to display high dependence on a narrow range of services, with tourism accounting for an estimated 40 percent of GDP and more than half of foreign exchange earnings (TSA Preliminary Report, 2023). Export diversification efforts showed moderate progress, with traditional agricultural exports facing competitiveness pressures and emerging non-traditional exports such as agro-processed foods, creative industries, and professional services still representing a small share of total exports. Merchandise exports experienced some volatility between 2019 and 2024, reflecting external market fluctuations and logistical disruptions, while services exports rebounded more strongly, albeit concentrated in tourism-related activities.

From a competitiveness perspective, structural challenges persisted across several dimensions. Logistics performance remained constrained by port congestion, limited cold chain infrastructure, and high shipping costs, as highlighted in trade facilitation consultations and seaport cargo flow analyses. Access to affordable trade finance and investment capital continued to pose barriers for small and medium-sized enterprises seeking to expand into export markets. Productivity growth was modest, reflecting both skills mismatches and technology adoption gaps across key sectors. Institutional competitiveness also faced limitations, with administrative procedures for business registration, investment approvals, and customs clearance processes cited as areas requiring continued modernization and streamlining.

The broader investment climate remained stable but constrained by structural factors typical of small states. Political stability, sound macroeconomic management, and ongoing infrastructure investments provided important enablers, yet small market size, vulnerability to external shocks, and high costs of doing business relative to larger economies tempered broader investment expansion. According to the last available World Bank Doing Business indicators, Saint Lucia ranked relatively favorably among OECS peers but lagged behind larger Caribbean economies in areas such as ease of trading across borders and access to credit.

Looking ahead to 2025 and beyond, Saint Lucia's competitiveness outlook is shaped by both opportunities and risks. Continued investment in sustainable tourism, renewable energy, digital economy infrastructure, and logistics modernization offer avenues to strengthen resilience and diversify the economic base. At the same time, emerging global trade risks, climate vulnerability, and technological disruption underscore the need for strategic reforms to deepen competitiveness foundations, enhance export sophistication, and build adaptive institutional capabilities. Positioning Saint Lucia to compete effectively in a more fragmented, climate-conscious, and digitally driven global economy will require sustained focus on strengthening macroeconomic stability, improving trade and investment facilitation, and accelerating private sector development as central pillars of the NES 2026–2030.



# Sector Performance

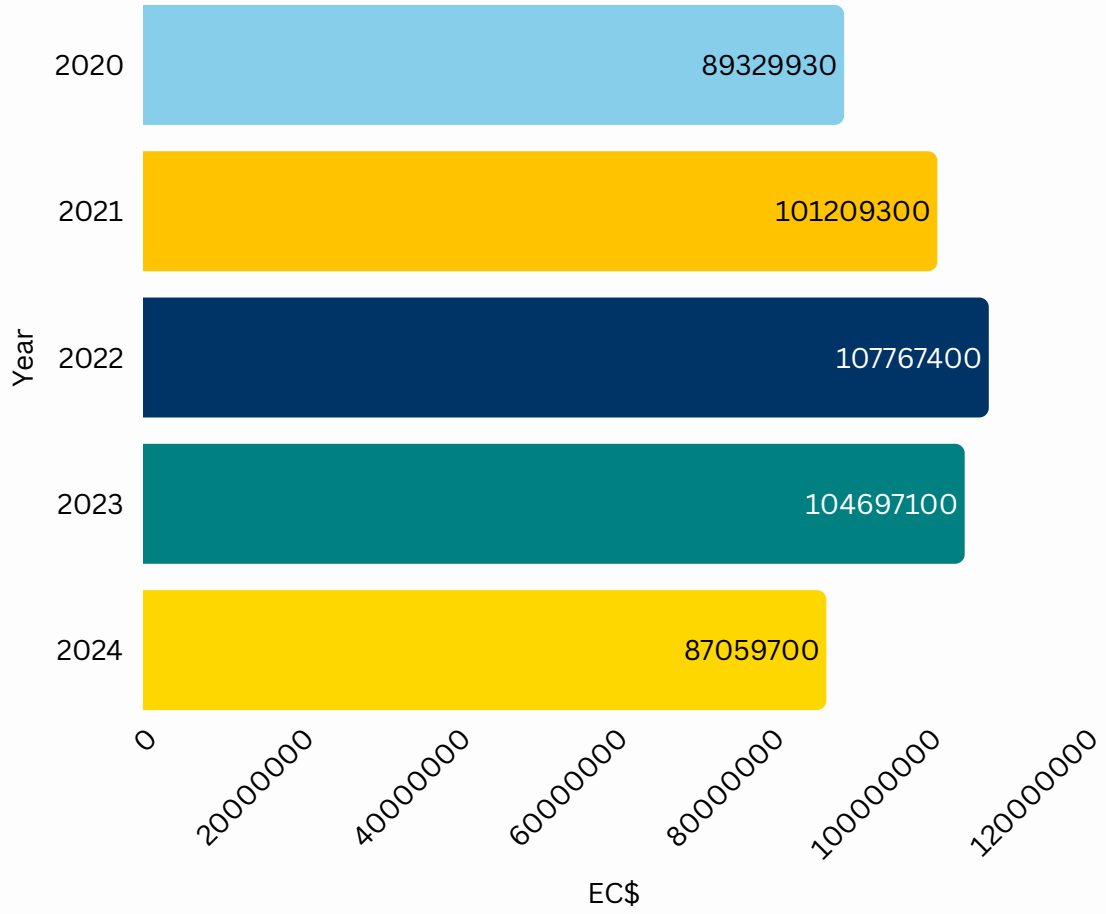
Saint Lucia's sectoral export performance over the NES 2020–2024 implementation period reflected resilience in traditional sectors and nascent potential in emerging areas, shaped by broader global dynamics, competitiveness conditions, structural bottlenecks, and exposure to external volatility. Tourism remained the principal export service, contributing an estimated 40 percent of GDP by 2023. Stable political conditions and regional integration frameworks provided favorable market access, while the sector simultaneously faced rising environmental risks and growing demand for sustainable tourism offerings.

Competitive pressures intensified within the Caribbean, with several destinations investing in product diversification and resilience measures. Saint Lucia's niche in high-end experiences such as yachting, boutique wellness tourism, and eco-adventure tourism offered opportunities for differentiation, yet heavy reliance on traditional source markets left the sector vulnerable to external demand shocks and shifting travel behaviors. The rebound of tourism post-pandemic demonstrated important resilience, but maintaining competitiveness will require deeper product diversification, sustainability certification, and investment in digital marketing and visitor engagement platforms.

The food and beverage sector experienced modest export growth, driven by increased demand for artisanal beverages, specialty foods, and functional foods aligned with health-conscious consumer trends. Regulatory improvements in food safety and standards compliance enhanced readiness for export market access. However, fragmented supply chains, inconsistent production volumes, and limited cold storage and logistics capacity constrained scaling efforts. Competitive cost pressures from larger regional producers further impacted margin sustainability. Export data between 2019 and 2024 showed positive but uneven growth in niche segments, reinforcing the need for strategic branding, market development, and tailored financial instruments for small exporters seeking to expand production for regional and diaspora markets.

Agro-processing exports, particularly in preserved foods, condiments, and value-added tropical products, showed resilience during the review period. However, limited market diversification and challenges in meeting international certification standards restricted broader market penetration. Bottlenecks in production scale, primary input quality, and packaging sophistication were consistently cited as barriers to competitiveness. Global shifts in consumer demand toward organic, sustainably sourced products offer opportunities, but realizing this potential requires targeted technical support, investment in quality assurance systems, and stronger linkages with high-value regional and diaspora retail channels.

## Total Domestic Export Performance




Source:Central Statistic Office

Saint Lucia's total domestic export performance over the NES 2020–2024 period reflects a pattern of post-pandemic resilience followed by renewed external pressures. After a sharp contraction in 2020 linked to global supply chain disruptions and market uncertainty, domestic exports rebounded strongly in 2021 and 2022, reflecting improved global demand and targeted efforts to stabilize production and market access. However, export performance softened in 2023 and contracted further in 2024, underscoring the fragility of the export recovery amid rising geopolitical tensions, persistent logistics challenges, and evolving market requirements. This trend highlights the need for Saint Lucia to deepen export diversification, strengthen resilience in supply chains, and enhance value-added production capabilities to sustain export growth under increasingly volatile global conditions.

The manufacturing sector remained relatively small and highly concentrated. Light manufacturing activities such as plastics, packaging, and small goods maintained a presence, but export growth stagnated over the period. High input costs, small production volumes, and logistics inefficiencies constrained broader market reach. Regional competition intensified as producers in larger markets leveraged economies of scale and lower production costs. Strengthening selective specialization, enhancing production efficiency, and integrating into niche regional supply chains are key strategies to revitalize manufacturing exports.

Agricultural exports, led by bananas, cocoa, and tropical fruits, remained exposed to climate-related disruptions and fluctuating external demand. Export volumes showed volatility, reflecting the sector's vulnerability to extreme weather events, plant disease outbreaks, and shifting phytosanitary regulations in external markets. Efforts to diversify into high-value crops, including organic and exotic varieties, gained traction but faced similar challenges around scale, aggregation, and consistent market supply. Building climate-resilient agricultural systems and strengthening export-ready value chains are critical to ensuring agriculture's continued role in supporting rural livelihoods and food security.

The creative industries sector demonstrated increasing momentum in music, performing arts, artisan crafts, and fashion. Regional visibility improved through participation in cultural trade events and growing use of digital platforms. However, the sector remained largely informal and undercapitalized. Weak intellectual property protection, limited digital skills, and a fragmented support ecosystem constrained export earnings. Scaling creative exports will require stronger sectoral governance, accessible financing mechanisms for creative entrepreneurs, digital skills development, and targeted initiatives linking creative industries to regional and diaspora markets.

Information and communication technology services showed early promise, underpinned by improvements in broadband infrastructure and growing digital fluency. However, Saint Lucia's digital services exports remained modest, and the country lagged behind regional peers in developing competitive BPO, e-learning, and digital content creation sectors. Limited digital trade readiness, skills gaps, and regulatory constraints restricted the sector's ability to capture emerging opportunities in a rapidly expanding digital economy. Building capacity in cybersecurity, digital entrepreneurship, and remote work facilitation will be essential to unlocking greater growth.

Renewable energy and green services emerged primarily as enablers of broader sustainability goals, with investments in solar energy infrastructure, green building standards, and energy efficiency consulting creating a platform for future green services exports. Global demand for climate-aligned services is growing rapidly, offering Saint Lucia an opportunity to position itself strategically. However, scaling up domestic capacity and building international recognition for Saint Lucia's green credentials remain early-stage challenges.

Education and professional services exports registered incremental growth, particularly in technical and vocational education for regional markets. Legal, consulting, architectural, and engineering services demonstrated niche competitiveness in select markets but remained small in scale. Fragmented regional professional certification frameworks and limited proactive market development strategies constrained broader expansion. Strategic opportunities exist to leverage regional trade agreements, invest in professional services branding, and harmonize certification and quality assurance standards to improve market penetration.

Across all sectors, the resilience assessment highlighted varying degrees of exposure to global volatility, climate shocks, and market disruptions. Traditional sectors such as agriculture and mass tourism remained highly sensitive to external risks, while emerging services sectors and digitally enabled exports offered more opportunities for adaptability and strategic repositioning. Building a more competitive and sustainable export economy will require a comprehensive focus on resilience strengthening, export sophistication, value chain integration, and institutional agility to navigate an increasingly complex and rapidly evolving global trade environment.

# Saint Lucia's Trade Ecosystem and Business Environment

The trade ecosystem and broader business environment in Saint Lucia during the NES 2020–2024 implementation period reflected a combination of resilience and persistent structural challenges that shaped export performance across goods and services sectors. Progress was made in trade facilitation, with improvements in port infrastructure and incremental digitalization of customs operations. However, competitiveness remained constrained by high logistics costs, congestion at key cargo points, and limited cold chain infrastructure. Total cargo volumes declined from 575,716 tons in 2020 to 539,310 tons by 2023, highlighting these pressures (Seaports Data 2018–2024). Although automation of documentation and the introduction of risk management systems contributed to more efficient customs clearance, the full integration of border agency processes and adoption of advanced inspection models remained incomplete, limiting seamless trade facilitation (OECD Trade Facilitation Indicators, 2022).

Export support services, led by Export Saint Lucia, contributed to market development, training initiatives, and trade missions. Nonetheless, exporters continued to face gaps in access to finance, certification assistance, and scaling support, which constrained their ability to meet evolving international market demands. Export trends across key goods sectors reflected these systemic limitations. Agro-processed goods, including sauces, condiments, and preserved fruits, accounted for approximately 18 percent of domestic exports by 2022 but remained concentrated within traditional regional markets (Exports of Selected Commodities, 2024). While beverage exports, notably artisanal rums and specialty drinks, maintained stability, competitive pressures underscored the need for stronger brand development and certification strategies. Banana exports, a traditional mainstay, declined by approximately 15 percent between 2020 and 2023, driven by climate shocks, rising production costs, and market volatility (Saint Lucia Economic and Social Review, 2023).

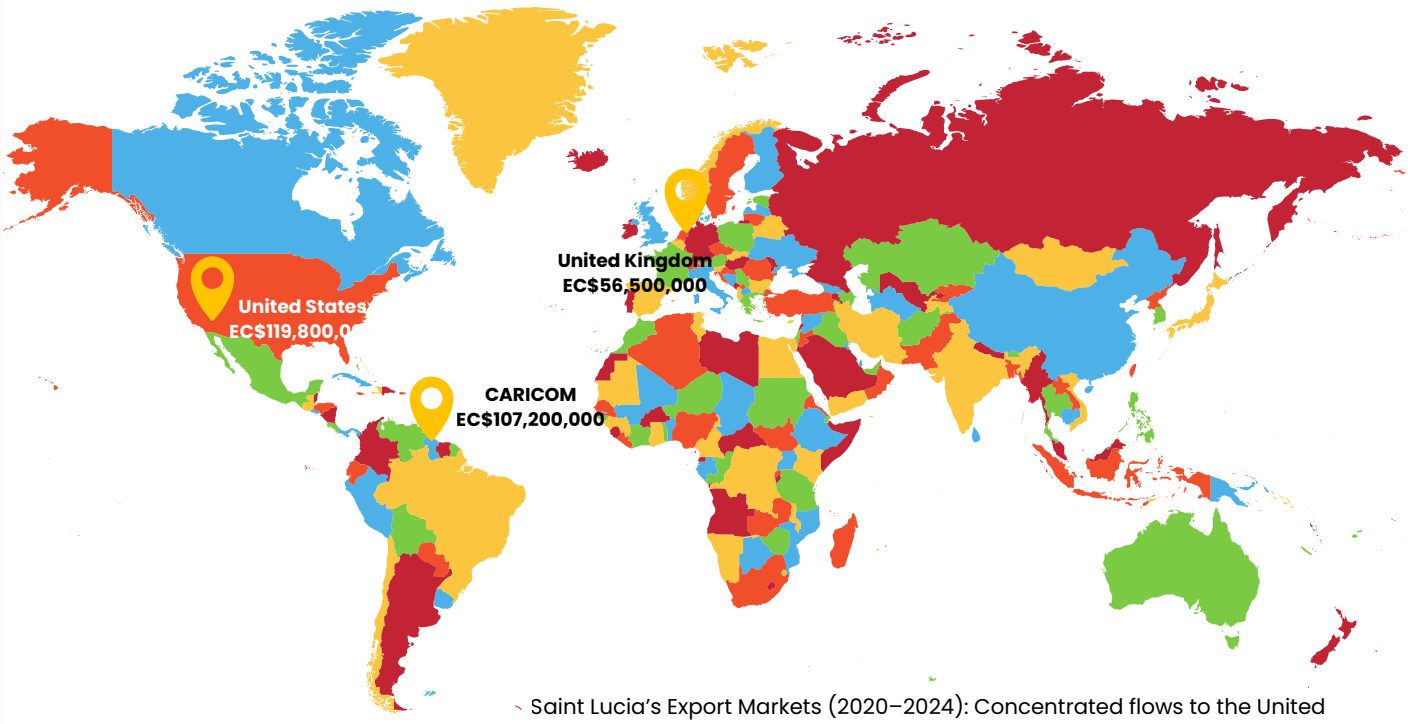
## Export Trends for Key Goods (2020–2024)

| Commodity | 2020 Export Value (EC$) | 2021 Export Value (EC$) | 2022 Export Value (EC$) | 2023 Export Value (EC$) | 2024 Export Value (EC$) |
|---|---|---|---|---|---|
| Bananas | 4,500,000 | 4,700,000 | 4,300,000 | 4,100,000 | 3,800,000 |
| Sauces and Condiments | 2,000,000 | 2,300,000 | 2,500,000 | 2,700,000 | 2,800,000 |
| Beverages (Artisan Rum) | 3,000,000 | 3,200,000 | 3,400,000 | 3,100,000 | 3,000,000 |

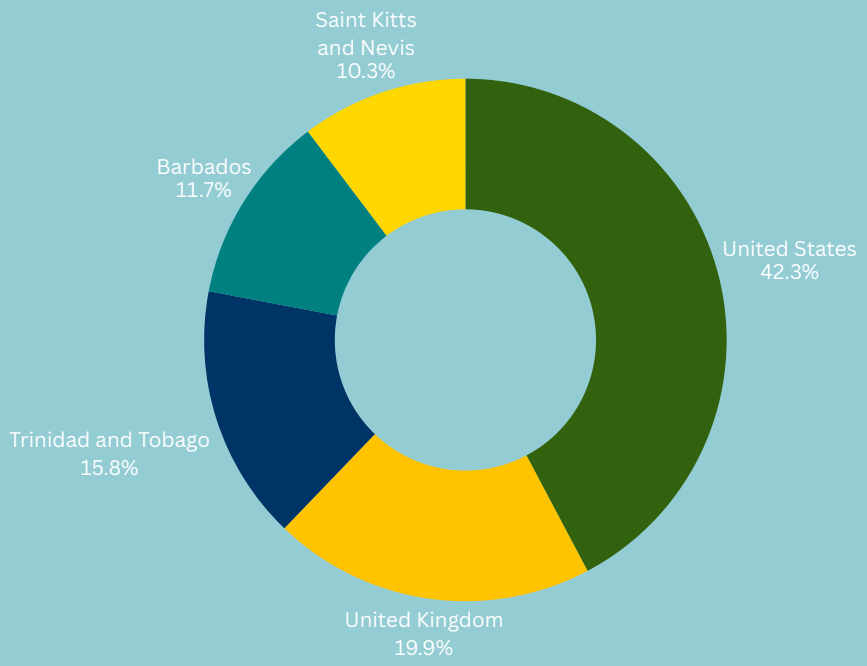
Export performance across Saint Lucia's priority goods sectors between 2020 and 2024 reflected distinct patterns of sectoral momentum and underlying vulnerabilities. Bananas, a traditional agricultural mainstay, exhibited a gradual decline in export value over the period, falling by approximately 16 percent from 2020 to 2024, largely due to climate-related production shocks, rising input costs, and external market volatility. In contrast, agro-processed products, particularly sauces and condiments, demonstrated consistent year-on-year growth, with export values increasing by approximately 40 percent over the same period, highlighting the emergence of a more resilient and higher-value niche within Saint Lucia's agricultural value chain. Beverages, including artisan rum, maintained relatively stable export values, peaking in 2022 before experiencing moderate softening in 2023 and 2024, reflecting competitive pressures in regional markets and shifting consumer preferences. These differentiated trends point to the importance of sustaining traditional agricultural exports through climate adaptation measures, while simultaneously accelerating the growth of agro-processing and specialty food and beverage exports to strengthen Saint Lucia's export diversification strategy and value addition efforts.

Export market concentration remained a strategic vulnerability. In 2022, over 60 percent of Saint Lucia's total domestic exports were destined for five key markets, with the United States alone accounting for nearly 47 percent (Total Exports by Destination Dataset, 2022). Although regional and extra-regional trade agreements, such as CARIFORUM-EU EPA and CSME protocols, provided market access opportunities, Saint Lucia's ability to diversify export destinations was limited by resource constraints in trade policy advocacy, market intelligence, and technical compliance support.

# SAINT LUCIA
# MAJOR TRADING PARTNERS




Saint Lucia's Export Markets (2020–2024): Concentrated flows to the United States, United Kingdom, and CARICOM highlight strategic opportunities for market diversification under the revised National Export Strategy.




Source:Central Statistics Office

Over the NES 2020–2024 period, Saint Lucia's export markets remained highly concentrated among a few key destinations. The United States accounted for the largest share of total exports, with an estimated EC$119.8 million over the five-year period, reflecting the island's continued reliance on North American demand.

The Caribbean region, comprising Trinidad and Tobago, Barbados, and Saint Kitts and Nevis, collectively represented approximately EC$107.2 million in exports, underscoring the strategic importance of regional integration and market proximity. The United Kingdom accounted for EC$56.5 million, highlighting the ongoing relevance of traditional European linkages, particularly for agricultural and niche products. This market structure points to both opportunities and vulnerabilities: while deepening ties with familiar markets offers stability, the heavy reliance on a limited number of destinations underscores the critical need for Saint Lucia to pursue strategic market diversification initiatives under the revised National Export Strategy.

To respond to these market concentration risks and strengthen the resilience of Saint Lucia's export sector, several strategic actions are recommended. First, diversifying export markets is essential. Targeted efforts should be made to explore emerging markets within Latin America and the wider Caribbean to reduce dependency on traditional partners and unlock new growth opportunities. Second, enhancing value addition in agricultural and agro-processed products must be prioritized. Investments in processing, branding, and certification will enable Saint Lucia to increase export revenues, capture higher-value segments, and improve competitiveness in regional and global markets. Third, strengthening trade facilitation is critical to support exporters in accessing new markets efficiently. Upgrading logistics infrastructure, streamlining regulatory processes, and improving the efficiency of customs and border management will be vital to lowering transaction costs and improving market access. Together, these initiatives form a foundation for building a more diversified, resilient, and future-ready export economy aligned with Saint Lucia's broader development objectives.

The trade and investment environment provided a stable platform but demonstrated untapped potential for deeper integration between foreign direct investment (FDI) and export development. Saint Lucia's openness to trade and investment, underpinned by political stability and a liberal investment regime, facilitated inflows of capital, particularly into tourism, real estate, and energy sectors. However, linkages between FDI and the local export base remained limited, with few structured efforts to promote investment projects that integrate backward supply chains, stimulate local sourcing, and drive value-added export growth. Strengthening investment promotion strategies with an explicit export development lens could improve the transformative impact of FDI on Saint Lucia's trade competitiveness.

The trade policy environment was broadly supportive but faced operational gaps in coherence, implementation, and private sector engagement. Saint Lucia's participation in CARICOM, OECS, the Economic Partnership Agreement with the European Union, and WTO agreements provided a strong framework for trade integration and market access. Nonetheless, the translation of these international commitments into domestic policy incentives, standards compliance frameworks, and business support programs remained incomplete. The Institutional capacity to monitor, implement, and advocate for trade policy reforms was constrained by limited human and financial resources. Stakeholder consultations during the NES review process highlighted the need for more proactive engagement between policymakers and exporters, particularly in addressing non-tariff barriers, export standards alignment, digital trade facilitation, and services trade promotion.

The broader business environment provided a stable macroeconomic foundation, underpinned by political stability and continued investment in infrastructure. However, structural challenges persisted, particularly in areas critical for export-led growth. Constraints related to access to credit, enforcement of contracts, trading across borders, and business registration processes continued to impact business dynamism (World Bank Doing Business Report, 2020). Although there were improvements in broadband connectivity and e-government services during the NES period, gaps in digital readiness, cybersecurity, and e-commerce facilitation continued to restrict the expansion of digitally enabled exports and limited SME participation in cross-border trade.

The resilience of Saint Lucia's trade ecosystem was tested during the review period by global supply chain disruptions, the COVID-19 pandemic, and increasing climate variability. While domestic goods exports rebounded strongly in 2021 and 2022, the subsequent softening in 2023 and 2024 illustrated the fragility of these gains. Exporters in agro-processing and small-scale manufacturing demonstrated adaptability through supply chain innovation and diversification efforts, yet resilience was uneven across sectors. Institutional coordination platforms helped facilitate dialogue but faced resource and capacity constraints that limited their effectiveness in driving integrated export growth strategies

Building a future-ready trade ecosystem will require an integrated approach to resilience strengthening. Investing in physical resilience through climate-adapted logistics infrastructure, enhancing digital resilience by improving cybersecurity, e-commerce capabilities, and digital skills, and reinforcing institutional resilience through stronger export finance mechanisms, certification support systems, and market intelligence services will be critical. These actions are essential to positioning Saint Lucia's exporters to compete effectively and sustainably in a global economy that is increasingly fragmented, climate-conscious, and digitally driven.



# Market Intelligence and Demand-Side Trends

The demand environment for Saint Lucia's exports during the NES 2020–2024 period was shaped by evolving global consumption patterns, heightened sustainability expectations, and the acceleration of digital trade. Key consumer markets, particularly in North America and Europe, demonstrated increased appetite for sustainably sourced agricultural products, organic foods, and ethically produced niche goods, aligning with Saint Lucia's strategic focus on agro-processing and specialty food and beverage exports. Agro-processed products, such as sauces and condiments, benefited from growing global preference for authentic, artisanal, and culturally distinctive food items, providing opportunities for differentiation in premium retail and specialty distribution channels (ITC Market Trends, 2022). In the services sector, the rise of remote work, online consumption, and digital outsourcing opened new possibilities for digital services and creative industries exports, although Saint Lucia's readiness to capture these opportunities remained constrained by gaps in digital infrastructure, e-commerce facilitation, and cross-border services promotion (UNCTAD Digital Economy Report, 2022).

Regional demand trends also presented mixed signals. The Caribbean market continued to be an important destination for Saint Lucian goods, particularly food and beverage products, packaging materials, and selected manufactured goods. However, competitive pressure from neighboring producers, such as expanded beverage and agro-processing exports from Trinidad and Tobago and the Dominican Republic, intensified across regional markets. This dynamic emphasized the need for continuous product innovation, brand strengthening, and market intelligence-driven positioning to protect and grow Saint Lucia's market share within the Caribbean.

Global logistics disruptions, heightened shipping costs, and evolving non-tariff measures—particularly related to food safety, sustainability certification, and digital compliance—shaped market access conditions across all major destinations. Buyers increasingly demanded not only price competitiveness but also proof of traceability, ethical production, and certification compliance, particularly in the agro-food and specialty goods sectors. These evolving buyer expectations reinforced the strategic imperative of strengthening Saint Lucia's export quality infrastructure, certification systems, and market intelligence capabilities to remain competitive in international markets.

Despite these shifting dynamics, market intelligence capabilities remained limited across most export sectors. While Export Saint Lucia provided valuable market-entry support and facilitated participation in trade promotion events, resource constraints limited the depth and frequency of proactive market research, competitive intelligence gathering, and buyer engagement activities. Exporters often operated without timely insights into evolving consumer preferences, regulatory changes, or emerging market opportunities, weakening their ability to adapt products and strategies effectively. Strengthening Saint Lucia's market intelligence systems—through structured buyer feedback mechanisms, sector-specific competitive analysis, and early warning systems for regulatory and consumer trend shifts—will be essential to future-proofing export development efforts. Building real-time, sector-driven market intelligence capabilities will allow Saint Lucian exporters to respond more agilely to dynamic global demand trends, enhancing resilience, competitiveness, and sustained market relevance.



# Stakeholder Engagement

The stakeholder engagement process for the revision of the National Export Strategy (NES) 2025–2029 was designed to ensure broad-based, inclusive participation across Saint Lucia's trade and export ecosystem. Recognizing that the effectiveness of the revised NES would depend heavily on sector-specific insights and practical implementation realities, the engagement methodology combined structured interviews and focused discussions with key public and private sector institutions, complemented by online feedback mechanisms to accommodate scheduling challenges and promote broader input where direct engagement was not feasible. While the initial engagement plan envisaged consultations with a wide cross-section of stakeholders, including MSMEs, youth entrepreneurs, and academic institutions, operational constraints during the engagement period led to a more targeted focus on agencies, associations, and trade-related organizations central to export development, facilitation, and sectoral growth.

Key groups consulted included government ministries and agencies responsible for trade, customs, investment promotion, standards, and sector development; private sector organizations representing manufacturing, shipping, logistics, and financial services; and institutions engaged in trade policy, export promotion, and economic development initiatives. Specific consultations were held with Export Saint Lucia, the Customs and Excise Department, the Department of Economic Development, the Ministry of Commerce, the Saint Lucia Bureau of Standards (SLBS), the Ministry of External Affairs, Invest Saint Lucia, the Saint Lucia Manufacturing Association, the Insurance Council, the Saint Lucia Air and Sea Ports Authority (SLASPA), the Saint Lucia Shipping Association, the Customs Brokers and Freight Forwarders Association, and representatives from the tourism and agriculture sectors.

Several core themes and strategic recommendations emerged from these consultations, directly shaping the revision of the NES. There was strong consensus on the need to strengthen institutional coordination and policy coherence across the trade and export development ecosystem, a finding that has been embedded in the proposed strategic objectives and action plans. Participants consistently emphasized the importance of enhancing export readiness among SMEs, improving logistics and shipping efficiency, strengthening market intelligence systems, and supporting exporters to meet evolving international certification, traceability, and compliance standards. Opportunities were identified for export growth in agro-processing, niche tourism services, renewable energy technologies, digital services, and creative industries, reinforcing the NES' focus on emerging sectors and future-fit diversification.

Divergent perspectives surfaced regarding sector prioritization, the design of export financing instruments, and balancing regional market consolidation with extra-regional market expansion, all of which were carefully considered in framing the strategic directions and risk management frameworks proposed. The insights gathered through stakeholder engagement thus played a critical role in validating strategic choices, informing institutional strengthening priorities, and ensuring that the NES 2026–2030 remains grounded in practical realities while being ambitious in its forward outlook.





# STRATEGIC FRAMEWORK

The revision of the National Export Strategy (NES) 2026–2030 is grounded in a strategic commitment to building a globally competitive, diversified, and resilient export economy, while preserving and leveraging Saint Lucia's authentic strengths. Guided by the principles of evidence-based refinement, future-fit adaptation, and strategic diversification, the NES articulates a renewed vision and mission that reflect both continuity and ambition. The strategy is anchored by core values of competitiveness, inclusiveness, resilience, and authenticity, and is structured around overarching strategic objectives designed to drive sustainable export growth, strengthen institutional coordination, and enhance Saint Lucia's positioning in dynamic regional and global markets.



# Vision

Uniquely Saint Lucian with global appeal



# Mission

To facilitate the expansion, diversification, and upgrading of authentic exports through sectoral competitiveness, innovation, and sustainability



# Strategic Values

The National Export Strategy (NES) 2026–2030 is anchored by four core strategic values — Competitiveness, Inclusiveness, Resilience, and Authenticity. These values shape the direction of Saint Lucia's export development efforts, ensuring that the country's growth is not only economically dynamic but also inclusive, adaptable, and distinctly Saint Lucian on the global stage.



## Competitiveness

Strengthening the quality, efficiency, and innovation capacity of Saint Lucia's exports to compete effectively in regional and international markets.



## Inclusiveness

Promoting equitable access to export opportunities for all segments of society, including MSMEs, women entrepreneurs, youth, and rural communities.

## Resilience

Building the capacity of sectors, enterprises, and institutions to absorb and adapt to external shocks such as climate change, global market disruptions, and technological shifts.

## Authenticity

Leveraging Saint Lucia's unique cultural, creative, and natural assets to differentiate its goods and services in global markets, enhancing value and brand recognition.

# Strategic Objectives

To achieve its vision and mission, the NES 2026–2030 pursues the following overarching strategic objectives:

## 01

### Strengthen Sectoral Competitiveness

**Upgrade productivity, quality standards, value addition, branding, research and development and innovation across priority goods and services sectors.**

## 02

### Expand and Diversify Market Access

Deepen engagement with traditional markets while expanding into new regional and international markets, supported by targeted branding, sector positioning, and market intelligence.

## 03

### Enhance Trade Facilitation and the Business Environment:

**Improve logistics, customs modernization, digital trade infrastructure, and regulatory frameworks to support seamless export transactions.**

## 04

### Promote Export-Oriented Entrepreneurship and MSME Participation

Empower small and medium-sized enterprises, women-led businesses, and youth entrepreneurs through training, skills development, and business support to enable dynamic participation in export growth.

## 05

### Strengthen the Trade Support Ecosystem and Institutional Coordination:

Build the capacity of trade-related agencies, enhance public–private collaboration, improve export data collection systems, and foster policy coherence to support export development.

## 06

### Embed Sustainability, Innovation, and Resilience Across Export Sectors:

**Integrate climate-smart practices, sustainable production models, and digital transformation into export strategies to future-proof Saint Lucia's trade competitiveness.**



# Critical Success Factors

The achievement of the NES 2026–2030 strategic objectives depends on a set of high-level critical success factors. These factors represent the essential conditions needed to strengthen sectoral competitiveness, diversify markets, enhance resilience, and sustain export growth. They serve as guiding priorities for implementation, resource allocation, and monitoring.

### Strengthen Sectoral Competitiveness

- Adoption of quality standards and certification systems across priority sectors.
- Increased investment in innovation, branding, and product development.

### Enhance Trade Facilitation and Business Environment

- Operationalization of modernized customs, logistics, and digital trade platforms.
- Reduction in time and cost for export transactions.

### Expand and Diversify Market Access

- Strengthened market intelligence and export promotion capacity.
- New trade agreements or facilitated access to emerging markets.



# Critical Success Factors



### Promote Export-Oriented Entrepreneurship and MSME Participation

- Scaled-up business development services and export-readiness programs.
- Increased number of MSMEs and women-led enterprises entering export markets.



### Strengthen Trade Support Ecosystem and Institutional Coordination

- Effective coordination between trade support agencies under a shared export development framework.
- Institutional strengthening programs implemented across key agencies.



### Embed Sustainability, Innovation, and Resilience Across Export Sectors

- Integration of climate-smart, sustainable, and digital practices in export sector strategies.
- Increased private sector engagement in resilience-building initiatives.



# CATALYSTS FOR EXPORT TRANSFORMATION

# PRIORITY SECTORS



The priority sectors identified under the NES 2026–2030 represent the principal catalysts for transforming Saint Lucia's export economy into a more diversified, resilient, and value-driven system. Sector prioritization builds upon the strategic foundations laid by the NES 2020–2024, retaining continuity where relevance and potential remain strong, while refining focus areas to better capture emerging global demand, technological change, and resilience imperatives. Selection was guided by key criteria, including historical export performance, revealed comparative advantage, sectoral contribution to national development goals, global market opportunities, and potential for value addition, innovation, and authenticity.

Consultations with stakeholders reaffirmed the enduring importance of core sectors such as tourism, agro-processing, and creative industries, while highlighting new opportunities in digital services, renewable energy-related exports, and education and knowledge services. Emphasis was placed not only on current market success but also on the transformative potential of these sectors to drive export diversification, foster innovation, expand employment, and embed greater resilience against external shocks. The selected sectors and enabling systems are therefore positioned as critical levers for repositioning Saint Lucia's exports in an increasingly competitive, digitally driven, and sustainability-oriented global economy.

In the revised National Export Strategy, priority sectors are addressed through a focused and complementary approach that strengthens Saint Lucia's efforts to build a resilient and competitive export economy. Building upon the foundations established in national sector strategies, the NES defines targeted export objectives that align with broader sector ambitions while sharpening the focus on export readiness, competitiveness, and market access.

For each priority sector, specific export-related outcomes have been identified, supported by measurable key performance indicators (KPIs) and carefully designed interventions. These interventions are selective and export-driven, addressing critical constraints and leveraging opportunities that directly impact Saint Lucia's performance in regional and global markets.

To support effective delivery, the NES establishes a clear institutional framework, identifying lead and supporting agencies to drive coordination, accountability, and resource alignment. This structured approach reflects international best practice by promoting coherence across public and private sector actions, ensuring that sectoral development efforts are mutually reinforcing and geared towards measurable export growth.

Through this methodology, the revised NES provides a strong, practical foundation for advancing Saint Lucia's competitiveness, diversifying exports, and building future-ready sectors anchored in resilience and innovation.

# Tourism

Tourism remains a cornerstone of Saint Lucia's economy, contributing significantly to GDP, foreign exchange earnings, and employment. It serves not only as the country's largest services export sector but also as a powerful driver of related industries such as agriculture, manufacturing, creative industries, and professional services. The sector's evolution has been shaped by global shifts in travel preferences, with increased demand for authentic cultural experiences, eco-friendly tourism, health and wellness offerings, and digital nomad-friendly destinations.

Saint Lucia's natural beauty, rich cultural heritage, and world-class attractions provide a strong competitive advantage; however, resilience to external shocks such as pandemics, climate change, and global market disruptions has become increasingly critical. Diversifying tourism products, embedding sustainability practices, strengthening service quality, and expanding into emerging service niches are now central to maintaining the sector's global competitiveness and future-proofing its contribution to national development.

Tourism's cross-cutting impact on MSME development, rural livelihoods, youth and women's employment, and national branding further reinforces its role as a catalyst for inclusive and resilient growth under the NES 2026–2030.



## Strategic Objective

To strengthen and diversify Saint Lucia's tourism sector by promoting authentic, sustainable, and high-value experiences, deepening linkages with local industries, integrating climate resilience and digital innovation, and expanding into emerging tourism service niches to enhance global competitiveness and increase economic benefits for communities across the island.

# Strategic Outcomes

### 1.Increased Tourism Export Earnings through High-Value Niches

- Position Saint Lucia as a premium provider of wellness, eco-adventure, and cultural tourism experiences to drive higher-value tourism exports.

### 2. Expanded Share of Sustainable and Resilient Tourism Exports

- Grow Saint Lucia's share of environmentally sustainable and climate-resilient tourism offerings in international markets.

### 3. Enhanced Global Competitiveness of Saint Lucia's Tourism Brand

- Strengthen Saint Lucia's tourism brand positioning as a high-quality, distinctive, and resilient export sector on the global stage.

### 4. Greater Integration of Local Value into Exported Tourism Services

- Increase the domestic content of exported tourism experiences by deepening linkages with local suppliers, artisans, and service providers.

### 5. Improved Export Readiness and Standards in Tourism Services

- Raise the international service standards and export compliance of Saint Lucia's tourism sector to access and sustain high-value global markets.

# Recommended Actions and Interventions

| Priority Area | Actions |
|---|---|
| 1. Product Diversification and Authentic Experiences | • Develop a national framework to promote investment in authentic niche tourism products (eco, wellness, heritage, yachting, MICE, business events inter alia).<br>• Facilitate tourism investment promotion initiatives targeting emerging service niches through coordination with Invest Saint Lucia.<br>• Strengthen tourism supply chain linkages with agriculture, creative industries, and local manufacturers.<br>• Identify and promote Saint Lucia as a boutique destination for executive retreats, incentive travel, and small-to-medium-scale business events. |
| 2. Sustainability and Climate Resilience | • Establish national guidelines and support programs for sustainable tourism certification.<br>• Integrate climate risk adaptation protocols into tourism development policies and investment standards. |
| 3. Market Expansion and Digital Innovation | • SLTA to lead implementation of targeted international marketing campaigns focusing on niche experiences and diaspora markets.<br>• Ministry to support policy frameworks that enhance destination competitiveness through certification, standards development, and quality assurance.<br>• Develop a branded MICE and business events portfolio to position Saint Lucia in targeted international markets as a location for strategic, high-value corporate gatherings and retreats. |
| 4. Institutional Strengthening and Capacity Building | • Strengthen the Ministry of Tourism's policy coordination, research, digitalization, and sector M&E capabilities.<br>• Strengthen capacity for tourism sector data collection, analysis, and reporting, including export earnings, visitor expenditure, certification uptake, and tourism investment flows, in collaboration with SLTA and Invest Saint Lucia.<br>• Develop and deliver continuous professional development programs for tourism MSMEs, public officers, and community tourism stakeholders.<br>• Upgrade internal Ministry systems for project management, investment facilitation, and tourism data tracking. |
| 5. Infrastructure and Regulatory Support | • Develop and implement policy frameworks for rural tourism incentives, digital nomad visa facilitation, and expansion of yachting/marina services.<br>• Support community-based tourism readiness programs upgrading rural visitor infrastructure and service quality. |

## Recommended KPIs

| KPI | Target by 2030 | Lead Agency |
|---|---|---|
| Number of new certified or officially launched niche tourism products | 10 | Ministry of Tourism / SLTA |
| Number of individuals certified through service excellence/sustainability training programs | 500-1,000 individuals | TVET Council / Ministry of Tourism |
| Number of tourism enterprises certified under recognized sustainability standards | 30 enterprises | Ministry of Tourism / Commerce Agencies |
| Number of tourism sector policy instruments developed or updated (e.g., Digital Nomad Visa, Sustainable Tourism Guidelines) | 3 policy instruments | Ministry of Tourism |
| Number of tourism investment promotion initiatives launched targeting new niches | 5 initiatives | Ministry of Tourism / Invest Saint Lucia |
| Establishment or enhancement of a centralized tourism performance information system | 1 system operational by 2027 | Ministry of Tourism / SLTA |
| Number of targeted international campaigns launched (niche and diaspora markets) | 6 campaigns | Ministry of Tourism / SLTA |
| Community Tourism Agency | Launch 5 certified community-based tourism experiences by 2030 that meet national quality standards and are integrated into Saint Lucia's tourism promotion platforms. | Support for community-based tourism initiatives, stakeholder engagement, and local capacity building in rural and heritage-based tourism offerings. |

# Institutional Framework

| Lead Agency/Partner | Role |
|---|---|
| Ministry of Tourism | Policy development, sector coordination, investment facilitation, institutional strengthening. |
| Saint Lucia Tourism Authority (SLTA) | Destination branding, international marketing campaigns, diaspora engagement. |
| Invest Saint Lucia (ISL) | Facilitation of investment in emerging tourism niches and rural destination development. |
| Ministry of Commerce and Business Support Agencies | Support for MSMEs participating in tourism value chains. |
| SLASPA and Port Authorities | Development and modernization of yachting and marina facilities. |
| TVET Council / NSDC | Delivery of service excellence and sustainable tourism training programs. |
| Export Saint Lucia | Promotion of tourism-related export services and experiences internationally. |
| Community Tourism Agency | Support for community-based tourism initiatives, stakeholder engagement, and local capacity building in rural and heritage-based tourism offerings. |

# Agro-Processing and Food & Beverage

Agro-processing and food and beverage manufacturing are essential pillars of Saint Lucia's export diversification strategy, offering critical linkages between the agricultural base and higher-value international markets. Historically dominated by traditional agricultural exports, Saint Lucia has expanded into niche processed foods, artisanal beverages, organic products, and functional foods. Global demand trends now favor health-conscious, organic, plant-based, and culturally distinctive food products, creating significant opportunities for Saint Lucian exporters to reposition themselves competitively.

The sector contributes not only to foreign exchange earnings but also to rural employment, MSME development, food security, and national branding efforts. However, realizing this potential requires strategic interventions to improve product quality, branding, export market access, certification standards, supply chain efficiency, and innovation. Agro-processing's cross-cutting impact on tourism, retail, creative industries, and logistics further reinforces its role as a catalyst for resilient and inclusive economic growth under the NES 2026–2030.



## Strategic Objective

To strengthen the competitiveness, innovation, and export-readiness of Saint Lucia's agro-processing and food and beverage sector by upgrading product quality and certification, enhancing market access, promoting value-added and culturally distinctive products, and building resilient supply chains to support sustainable export growth.

## Strategic Outcomes

### 1. Expanded Export Earnings from Value-Added Agro-Processed Products

- Increase Saint Lucia's export earnings by scaling the production and international marketing of high-value, value-added agro-processed goods.

### 2. Enhanced International Competitiveness Through Quality and Certification Upgrades

- Strengthen the global competitiveness of Saint Lucian food and beverage exports through expanded adoption of international quality, safety, and sustainability certifications.

### 3. Diversified Export Markets for Agro-Processed Goods

- Achieve greater market diversification for agro-processed exports by penetrating new regional and international markets beyond traditional trading partners.

### 4. Strengthened Agro-Processing Value Chains to Improve Export Readiness

- Deepen and modernize supply chains for agro-processing to ensure consistent quality, production efficiency, and export market readiness.

### 5. Increased Integration of Climate-Smart and Sustainable Practices in Export Production

- Position Saint Lucia's agro-processing sector as a supplier of sustainably produced, climate-resilient food and beverage products in international markets.

# Recommended Actions and Interventions

| Priority Area | Policy and Programmatic Interventions |
|---|---|
| 1. Product Development, Quality Standards, and Certification | • Strengthen implementation and compliance with national certification and quality assurance framework for agro-processed goods (HACCP, sustainability standards).<br>• Modernize national food safety and export compliance frameworks to align with international standards.<br>• Support product innovation initiatives targeting functional foods, plant-based goods, and artisanal product development. |
| 2. Export Market Development and Branding | • Strengthen Saint Lucia's agro-processing country brand around quality, authenticity, health, and sustainability.<br>• Facilitate participation in international trade fairs, diaspora engagement programs, and digital marketing platforms targeting niche agro-products. |
| 3. Supply Chain Efficiency, Digitalization, and Climate Resilience | • Support the establishment of shared-use processing, storage, and cold chain facilities that enhance climate resilience and reduce post-harvest losses.<br>• Promote the adoption of traceability, digital compliance tools, and smart logistics systems by agro-processing exporters.<br>• Build MSME capacity in climate-smart agro-processing practice |
| 4. Institutional Strengthening and Capacity Building | • Build institutional capacity in export facilitation, food safety certification support, and SME export development in collaboration key agencies (Ministry of Commerce, Export Saint Lucia, SLBS).<br>• Deliver continuous training programs for agro-processors on export readiness, food safety management, and international market standards. |
| 5. Access to Finance and Investment Facilitation | • Expand export finance, insurance, and risk-sharing mechanisms tailored for agro-processing MSMEs.<br>• Facilitate investment attraction for agro-innovation hubs and scale-up of emerging niche exporters. |
| 6. Policy and Regulatory Frameworks | • Develop an agro-processing investment incentive framework supporting exporters investing in innovation, technology, and sustainability.<br>• Establish fast-track certification support systems for export-ready agro-processors.<br>• Integrate agro-processing priorities into Saint Lucia's national digital trade policy frameworks. |

# Institutional Framework

| Lead Agency/Partner | Role |
|---|---|
| Ministry of Commerce, Manufacturing, Business Development, Cooperatives, and Consumer Affairs | Policy leadership, SME development, investment facilitation. |
| Export Saint Lucia | Export market intelligence, promotion, trade mission support. |
| Saint Lucia Bureau of Standards (SLBS) | Certification, standards development, testing services. |
| Ministry of Agriculture | Strengthening backward linkages with farmers and primary producers. |
| Saint Lucia Trade Export Promotion Agency (TEPA) (or successor Export entity) | Support branding and export capacity building initiatives. |
| Chamber of Commerce, Manufacturers Association | Private sector collaboration for supply chain and standards adoption. |
| National Competitiveness and Productivity Council (NCPC) | Sectoral competitiveness assessments and export productivity programs. |

## Recommend KPIs

| KPI | Target by 2030 | Lead Agency |
|---|---|---|
| National food safety and export compliance framework updated and operational | 1 framework completed | Ministry of Commerce / SLBS |
| Number of agro-processing exporters achieving HACCP, organic, or similar certification | 30 enterprises | SLBS / Ministry of Commerce |
| Number of new functional, organic, or plant-based products developed and positioned for export | 20 new products | Export Saint Lucia / Manufacturers Association |
| Number of agro-processing MSMEs using traceability and digital compliance technologies | 40 MSMEs | Ministry of Commerce / Export Saint Lucia |
| Number of climate-resilient shared-use processing and cold storage facilities operational | 3 facilities nationally | Ministry of Commerce / Invest Saint Lucia |
| Establishment of agro-processing export finance and innovation incentive programs | 2 programs launched | Ministry of Commerce |
| Increase in export earnings from the agro-processing sector | +25% growth from 2024 baseline | Export Saint Lucia / Ministry of Commerce |

# Creative and Cultural Industries

Creative and cultural industries (CCIs) represent a dynamic and increasingly vital driver of Saint Lucia's economic diversification, national identity, and global engagement. Rooted in the island's rich cultural heritage, talent pool, and artistic innovation, the sector encompasses music, dance, theatre, film, fashion, literary arts, visual arts, digital media, and cultural tourism experiences.

Global demand for Caribbean culture, storytelling, music, design, and digital content demonstrates potential for growth, offering significant opportunities for Saint Lucian creators to access international markets. However, challenges such as limited access to finance, weak IP protection and monetization mechanisms, fragmented value chains, and limited digital readiness have constrained sector growth.

Strengthening the creative economy offers a path to higher value-added services exports, rural inclusion, youth employment, cultural preservation, and national brand amplification. Under the NES 2026–2030, CCIs are positioned as a catalyst for export diversification, resilience, and sustainable development — leveraging authenticity, innovation, and technology to create globally competitive creative exports.



## Strategic Objective

To build a globally competitive, digitally empowered, and resilient creative and cultural industries sector by strengthening market access, intellectual property protection, sector capacity, and innovation ecosystems, while promoting Saint Lucia's unique cultural identity as an export asset.

## Strategic Outcomes

### 1. Expanded International Revenue from Saint Lucian Creative Exports

- Increase export earnings from music, film, fashion, digital media, and cultural services through targeted market expansion and brand positioning.

### 2. Enhanced Global Visibility and Market Positioning of Saint Lucian Creative Products

- Strengthen Saint Lucia's presence in international creative markets by promoting authentic, high-quality, and export-ready cultural goods and services.

### 3. Increased Participation of Creative Enterprises in Global Value Chains

- Integrate Saint Lucian creative businesses into regional and global value chains through capacity-building, partnerships, and export market facilitation.

### 4. Strengthened Intellectual Property Protection to Support Creative Export Competitiveness

- Enhance the protection, registration, and commercialization of intellectual property assets to secure and expand creative sector export opportunities.

### 5. Diversified Export Markets for Cultural and Creative Goods and Services

- Broaden market reach for Saint Lucian creative exports by accessing emerging markets and diaspora communities, reducing dependence on traditional markets.

# Recommended Actions and Interventions

| Priority Area | Policy and Programmatic Interventions |
|---|---|
| 1. Market Access, Export Readiness, and Branding | • Develop and implement a national Creative Export Development Program to support international market entry for creative goods and services (music, fashion, film, visual arts, cultural tourism experiences).<br>• Strengthen Saint Lucia's cultural branding strategy for creative exports.<br>• Facilitate market access and export promotion for Saint Lucian creatives by strengthening the presence of creative services and products in international cultural markets, trade shows, festivals, and digital platforms.<br>• Operationalise Protocol III of the CARIFORUM–EU EPA as a prerequisite for market entry of creative industries, through legal and institutional alignment. This includes coordination across relevant ministries and integration into the National Plan. |
| 2. Digitization and Innovation in Creative Industries | • Promote adoption of digital platforms, virtual marketplaces, and e-commerce models for creative products and services.<br>• Support investment in digital production infrastructure (e.g., recording studios, editing suites, digital art labs).<br>• Provide technical assistance to help creators digitize their work, access global audiences, and build digital revenue streams. |
| 3. Intellectual Property Protection and Monetization | • Strengthen national IP frameworks to support protection, licensing, collective management, and export monetization of creative outputs.<br>• Deliver training programs for creative entrepreneurs on IP rights, contract negotiation, and licensing models. |
| 4. Institutional Strengthening and Capacity Building | • Build the capacity of agencies (Export Saint Lucia, Culture Division, Commerce, Intellectual Property Office) to facilitate creative export development.<br>• Establish creative business incubators and mentorship programs for export-ready talent and enterprises. |
| 5. Climate Resilience and Sustainability in Cultural Production | • Promote climate-smart event production standards and sustainable practices in cultural festivals, performances, and production supply chains.<br>• Develop disaster risk management guidelines for cultural venues and creative infrastructure. |
| 6. Policy and Regulatory Frameworks | • Update Saint Lucia's national Creative Industries Policy to embed export development, digital economy integration, and IP monetization.<br>• Facilitate regulatory incentives for creative enterprises adopting sustainable practices and digital transformation. |

# Institutional Framework

| Lead Agency/Partner | Role |
|---|---|
| Department of Culture / Ministry of Tourism, Investment, Creative Industries, Culture and Information | Policy leadership, cultural promotion, export program facilitation. |
| Export Saint Lucia | Creative export promotion, trade mission support, branding. |
| Intellectual Property Office (IPO) | IP registration, protection awareness, licensing support. |
| Ministry of Commerce, Manufacturing, Business Development, Cooperatives, and Consumer Affairs | SME support, digitalization programs for creative enterprises. |
| SLBS | Development of standards for sustainable event production and creative products. |
| Private Sector Associations (e.g., Musicians Associations, Fashion Guilds, Film Councils) | Industry mobilization, partnership building. |

## Recommended KPIs

| KPI | Target by 2030 | Lead Agency |
|---|---|---|
| National Creative Export Development Program established and operational | 1 program operational by 2027 | Ministry of Culture / Export Saint Lucia |
| Number of creative enterprises accessing international markets through structured export support | 100 enterprises supported | Export Saint Lucia |
| Increase in number of registered and licensed creative works | +30% over 2024 baseline | Intellectual Property Office |
| Number of creative enterprises adopting e-commerce platforms or digital distribution channels | 100 enterprises | Ministry of Commerce / Export Saint Lucia |
| Updated national Creative Industries Policy integrating export development and digital economy focus | 1 updated policy by 2027 | Ministry of Culture |
| Number of creative enterprises adopting sustainability guidelines or standards | 30 enterprises | SLBS / Ministry of Culture |

# ICT and Digital Services

ICT and digital services are key enablers of Saint Lucia's ambition to transform into a resilient, diversified, and future-ready economy. As global demand for ICT-enabled services accelerates — spanning business process outsourcing (BPO), cybersecurity services, fintech, digital education, health tech, e-commerce solutions, and creative digital media — small states like Saint Lucia have opportunities to integrate into global value chains through services exports.

Digital services offer high value-to-weight ratios, low physical export barriers, and strong linkages to innovation ecosystems, youth employment, diaspora engagement, and inclusive growth. However, challenges remain in digital infrastructure gaps, regulatory modernization, workforce digital skills, access to finance for tech startups, and global market visibility. Strengthening Saint Lucia's ICT and digital services ecosystem is critical to creating new export sectors, expanding employment opportunities, improving economic resilience, and embedding digital transformation across the wider economy.

The NES 2026–2030 positions ICT and digital services not just as a growth sector, but as a strategic enabler across all priority sectors.




## Strategic Objective

To position Saint Lucia as a competitive exporter of ICT and digital services by strengthening digital infrastructure, enhancing workforce capabilities, promoting innovation ecosystems, modernizing regulatory frameworks, and facilitating international market access for technology-driven enterprises.

# Strategic Objective

### 1. Expanded Export Revenue from ICT-Enabled Business and Professional Services

- Increase Saint Lucia's export earnings from ICT-enabled services such as business process outsourcing (BPO), knowledge process outsourcing (KPO), digital marketing, remote accounting, and creative digital content services.

### 2. Positioning Saint Lucia as a Boutique Nearshore Services Destination

- Establish Saint Lucia as a boutique nearshore hub offering customized, high-quality digital business services to regional and international clients, leveraging cultural affinity, service excellence, and location advantages.

### 3. Improved International Market Access for Saint Lucian Digital Services Providers

- Strengthen access to regional and international markets for Saint Lucia's ICT-enabled service providers through export facilitation initiatives, trade missions, certifications, and digital trade platforms.

### 4. Strengthened Capacity for Export-Ready Digital Skills and Services

- Build a pipeline of digitally skilled professionals equipped for export-driven services, including customer support, virtual assistance, content creation, online education services, and financial back-office services.

### 5. Enhanced Digital Infrastructure to Support Export-Led Growth

- Upgrade digital infrastructure — broadband reliability, cybersecurity standards, and data protection — to create a supportive environment for the expansion of ICT and digital services exports.

# Recommended Actions and Interventions

| Priority Area | Policy and Programmatic Interventions |
|---|---|
| 1. Digital Infrastructure and Ecosystem Development | • Expand national broadband coverage, international connectivity, and cloud services access to support digital exporters.<br>• Facilitate establishment of technology hubs and co-working spaces targeting digital entrepreneurs. |
| 2. Export Market Development and Positioning | • Develop a National Digital Export Promotion Program targeting priority niches (e.g., BPO, cybersecurity, e-learning, fintech, creative digital services).<br>• Support Saint Lucian digital firms' participation in international ICT trade missions and virtual B2B platforms. |
| 3. Workforce Development and Digital Skills Readiness | • Implement national ICT skills development programs aligned with priority export segments (BPO, cybersecurity, app development, cloud services, AI).<br>• Promote certification programs (e.g., AWS, Microsoft, Cisco, cybersecurity certifications) to enhance global employability. |
| 4. Innovation and Entrepreneurship Support | • Establish digital innovation hubs and accelerator programs for export-ready startups.<br>• Expand access to innovation financing mechanisms tailored for tech-driven enterprises. |
| 5. Climate Resilience and Sustainability in Digital Economy | • Promote green ICT practices (energy-efficient data centers, e-waste management policies).<br>• Integrate climate resilience protocols into national digital economy strategies and infrastructure standards. |
| 6. Policy and Regulatory Framework Modernization | • Update national ICT, e-commerce, data protection, and digital trade policies to support services exports.<br>• Facilitate regulatory reforms to enhance cross-border digital trade, digital taxation clarity, and cybersecurity resilience.<br>• Align with CARICOM Single ICT Space and OECD Digital Trade Best Practices. |

# Institutional Framework

| Lead Agency/Partner | Role |
|---|---|
| Department of the Public Service / Division of Public Sector Modernization / Ministry of Commerce | Policy leadership for digital economy, regulatory modernization, digital infrastructure development. |
| Invest Saint Lucia | Promotion of ICT sector investment (tech parks, co-working hubs). |
| Export Saint Lucia | Export promotion of digital services, B2B matchmaking, trade missions. |
| SLBS | Development of standards for data security, cybersecurity, and green ICT practices. |
| ICT Association of Saint Lucia (or related tech industry bodies) | Private sector engagement, digital entrepreneur mobilization. |
| NSDC / TVET Council | Digital skills training and certification delivery. |

# Recommended KPIs

| KPI | Target by 2030 | Lead Agency |
|---|---|---|
| National Digital Export Promotion Program launched and operational | 1 program operational by 2026 | Export Saint Lucia / Ministry of Commerce |
| Number of digital services exporters accessing new markets | 50 enterprises supported | Export Saint Lucia |
| National ICT skills certification program established and number of individuals certified | 1 program, 1,000 individuals certified | NSDC / TVET Council |
| Number of new tech innovation hubs and co-working spaces established | 3 hubs nationally | Invest Saint Lucia |
| Number of policy and regulatory reforms enacted to support digital exports (e.g., e-commerce law, data protection, digital trade facilitation) | 4 reforms implemented by 2028 | Ministry of Commerce / Public Sector Modernization Unit |
| Increase in ICT and digital services export earnings | +30% growth from 2024 baseline | Export Saint Lucia / Ministry of Commerce |

## Sub-Sectors and Emerging Export Opportunities

As global markets shift rapidly toward digitalization, sustainability, health consciousness, and authenticity-driven consumption, Saint Lucia's export strategy must recognize, nurture, and strategically position emerging sub-sectors that offer high-growth potential. These sub-sectors complement Saint Lucia's traditional export strengths and provide pathways to deeper value addition, greater resilience, expanded services exports, and stronger inclusion of youth, women, and rural entrepreneurs. Targeted support for these dynamic areas will enable Saint Lucia's NES 2026–2030 to remain agile, responsive to global trends, and future-fit.

The following sub-sectors and emerging industries have been identified across the priority sectors:

| Core Sector | Sub-Sectors and Emerging Niches |
|---|---|
| Tourism and Related Services | Eco-tourism and adventure tourism; Sports tourism, Events tourism, Health and wellness tourism; Digital nomad and remote work tourism; Yachting and luxury real estate-linked tourism experiences; Cultural heritage and community-based tourism. |
| Agro-Processing and Food & Beverage | Functional foods (health-oriented, nutritional products); Organic food and beverage lines; Plant-based and vegan product innovations; Artisanal beverage development (rum, liqueurs, specialty juices); Agro-innovation startups leveraging smart agriculture technologies. |
| Creative and Cultural Industries | Digital creative services (animation, digital art, online content production); Fashion and apparel linked to Caribbean heritage; Film and audio-visual exports; Cultural tourism-linked creative products; Virtual performing arts platforms; Sports and Entertainment Services (e.g. professional sport talent exports, sport tourism, entertainment events and festivals, athlete branding). |
| ICT and Digital Services | Cybersecurity services for SMEs and institutions; AI-enabled Business Process Outsourcing (BPO) and knowledge process outsourcing (KPO); E-learning platforms and digital education exports; Fintech and digital finance services; E-commerce platform development and cross-border digital retail services. |

The inclusion of targeted sub-sectors and emerging industries is critical to strengthening the resilience, competitiveness, and adaptability of Saint Lucia's national export strategy. In an increasingly volatile and innovation-driven global economy, Saint Lucia cannot rely solely on traditional sectoral strengths. Sub-sectors such as functional foods, digital creative services, cybersecurity, eco-tourism, and fintech represent fast-growing markets characterized by higher value addition, knowledge intensity, sustainability alignment, and differentiated demand. By nurturing and supporting these emerging areas, Saint Lucia is better positioned to achieve several core objectives under the NES 2026–2030:

- **Enhance Economic Resilience:** A broader, more diversified export portfolio reduces vulnerability to sector-specific shocks, price volatility, and external disruptions.

- **High-Value Markets**: Emerging niches such as health-oriented foods, digital services, and sustainable tourism attract premium market segments seeking authenticity, innovation, and impact.

- **Foster Innovation and Entrepreneurship:** Emerging sectors encourage the development of dynamic MSMEs and startups, especially among youth and creative professionals.

- **Drive Inclusive Growth:** Sub-sectors offer accessible entry points for rural entrepreneurs, women-led businesses, and smaller producers into export markets.

- **Align with Global Sustainability and Digital Trends:** Markets are increasingly demanding eco-friendly, digitally accessible, and socially responsible products and services — creating strategic advantages for forward-looking exporters.

- **Strengthen National Branding:** Exporting distinctive, culturally authentic, and sustainability-driven products enhances Saint Lucia's international image as an innovative and responsible trading nation.

To fully leverage the potential of emerging sectors, the National Export Strategy 2025–2029 must adopt a forward-looking, flexible, and adaptive implementation approach. This entails the following strategic shifts:

- **Mainstream Sub-Sector Development**: Policy, promotion, and capacity-building initiatives must explicitly support and track progress in emerging niches alongside core sectors.

- **Tailor Investment and Export Promotion**: Investment attraction efforts should prioritize dynamic sub-sectors by offering targeted incentives, facilitating financing, and showcasing emerging opportunities to international investors and buyers.

- **Enhance Digital and Innovation Capabilities:** Support for digital transformation, innovation hubs, and tech-enabled service models must underpin the growth of sub-sectors such as e-learning, digital arts, fintech, and smart agro-processing.

- **Embed Climate Resilience and Sustainability:** Development pathways for emerging sectors must integrate green practices, sustainable certifications, and climate-smart business models.

- **Develop Responsive Regulatory Frameworks:** New sectors may require modernized legislation and standards — for instance, in IP protection for digital content, data security for fintech, or sustainability standards for eco-tourism products.

- **Strengthen Trade Facilitation for New Sectors:** Trade policy and facilitation efforts must consider the specific needs of services exports (e.g., digital trade policies, online certification processes) and non-traditional goods exports (e.g., functional foods).

By doing so, Saint Lucia's NES 2026–2030 will not only build on current export strengths but will also create a dynamic platform for future growth, competitiveness, and sustainability.


National Priority Export Sectors
Services
ICT & Digital Services
Knowledge & Professional services
Sports & Entertainment Services
Creative & cultural Industries
Digital creation
Fashion
Film & Audio Visual
Agro-processing/food & beverage
Organic foods
Functional foods
Artisanal beverages
Tourism
Digital tourism
Sports Tourism
MICE & Business Events
Events Tourism
Cultural heritage & Community based tourism
Health & Wellness
Eco & Adventure tourism

# Service Export Approach

Saint Lucia's National Export Strategy 2026–2030 recognizes the services sector as a central pillar of export diversification, competitiveness, and economic resilience. Services account for a growing share of global trade, with cross-border services expanding faster than goods over the past decade. For a small island developing state like Saint Lucia, services offer critical advantages: low physical barriers to trade, strong opportunities for innovation and differentiation, higher value-added potential, and pathways for inclusive growth through youth, women, and rural participation.

Building a vibrant services export sector strengthens Saint Lucia's positioning in the global economy, supports job creation, attracts investment, and enhances national brand equity. Services are no longer auxiliary to goods trade — they are a dynamic growth engine in their own right and must be prioritized with the same strategic intent.




True North for Services Export Development

Guided by the national vision for services sector development, the NES 2026–2030 anchors Saint Lucia's services export trajectory toward building a globally competitive, digitally empowered, and resilient services economy. The strategy prioritizes innovation, market access, sustainability, and inclusiveness, positioning Saint Lucia as a trusted provider of high-value services grounded in authenticity, creativity, and technology.

The NES 2026–2030 aligns Saint Lucia's services export strategy with CARICOM's seven priority sectors: professional services, ICT, tourism, cultural and entertainment services, education services, health and wellness services, and financial services. This alignment promotes regional coherence and positions Saint Lucia to compete more effectively within the CARICOM Single Market. The strategy integrates the United Nations Central Product Classification framework to support consistent data tracking, facilitate international benchmarking, and guide service-specific interventions.

Service development priorities are also organised around the four WTO modes of supply: cross-border trade, consumption abroad, commercial presence, and movement of natural persons. This helps clarify how services are traded, what enabling policies are needed, and where national support should be directed. Mode 4, which relates to the temporary movement of natural persons, is especially relevant for Saint Lucia's growth in areas such as cultural services, professional consulting, and wellness-based offerings.

# Core Strategic Pillars

| Pillar | Focus Areas |
|---|---|
| 1. Policy and Regulatory Reform | • Modernize services trade-related legislation and regulations (e.g., digital trade, e-commerce, data protection, IP protection for services outputs).<br>• Develop clear frameworks for cross-border service provision, digital taxation, and recognition of professional qualifications.<br>• Align national services regulation with CARICOM Single Market (CSME) and CARIFORUM-EU EPA obligations to maximize market access. |
| 2. Market Access and Export Promotion | • Establish a National Services Export Promotion Program focused on targeted international market entry for priority services niches.<br>• Develop services-specific trade missions, virtual showcases, and B2B matchmaking programs.<br>• Integrate services into all national and regional export promotion strategies. |
| 3. Capacity Building for Service Providers | • Develop tailored capacity building programs for service MSMEs and freelancers, covering areas such as internationalization, contracting, licensing, branding, digital marketing, and IP management.<br>• Facilitate mentorship, business incubation, and accelerator initiatives focused on services entrepreneurs.<br>• Promote digital and soft skills upgrading aligned with export requirements. |
| 4. Innovation, Digital Transformation, and Infrastructure | • Expand digital infrastructure and broadband access to support services firms.<br>• Support digital platform development for e-learning, fintech, creative content, health tourism, and professional services.<br>• Strengthen cybersecurity frameworks to protect digital service providers and cross-border transactions.<br>• Facilitate the adoption of emerging technologies such as AI, blockchain, and IoT in service delivery models. |
| 5. Data Systems for Services Trade Monitoring | • Strengthen national statistical capacity to collect, analyze, and report services trade data (aligned with WTO and CARICOM standards).<br>• Develop new indicators to track services exports performance, contribution to GDP, and MSME participation.<br>• Institutionalize services trade monitoring into the NES Monitoring and Evaluation Framework. |
| 6. Inclusive Services Trade Development | • Promote participation of women, youth, rural entrepreneurs, and diaspora in services export opportunities.<br>• Develop targeted programs to support underrepresented groups in accessing training, finance, and export platforms.<br>• Facilitate diaspora business networks for services exports (e.g., consulting, creative industries, education, health services). |
| 7. National Branding for Services | • Build and promote a strong national services brand under the "Brand Saint Lucia" initiative.<br>• Position Saint Lucia internationally as a provider of high-quality, authentic, sustainable, and innovative services.<br>• Leverage digital marketing, diaspora ambassadors, and strategic partnerships to expand brand reach. |

# Emerging Services Sub-Sectors

| Core Services Area | Priority Niches |
|---|---|
| ICT and Digital Services | • Cybersecurity services<br>• Digital content production<br>• E-learning platforms and EdTech<br>• BPO/KPO and remote work solutions |
| Creative and Cultural Services | • Digital creative media (film, animation, online arts)<br>• Music and audio production<br>• Fashion and design exports<br>• Virtual performing arts platforms |
| Tourism and Related Services | • Health and wellness tourism<br>• Digital nomad services and remote work hosting<br>• Eco and adventure tourism experiences<br>• Cultural tourism experiences |
| Knowledge-Based and Professional Services | • Consulting services (legal, management, education)<br>• Financial technology (fintech) solutions<br>• Remote education and digital certification services |

# Institutional Framework

| Lead Agency | Supporting Partners |
|---|---|
| Ministry with Responsibility for Creative Industries, Commerce, ICT, and Tourism | • Export Saint Lucia, Intellectual Property Office, SLBS, Business Support Organizations, Private Sector Associations, Diaspora Networks, Investment Promotion Agencies, TVET Council. |

# KPIs for Monitoring Services Strategy

| KPI | Target by 2030 |
|---|---|
| National Services Export Promotion Program launched and operational | 1 program operational by 2027 |
| Number of services enterprises supported for internationalization | 100 enterprises |
| Increase in services exports as a share of total exports | +20% from 2024 baseline |
| Number of regulatory reforms implemented to support cross-border services trade | 4 reforms |
| Number of digital platforms developed to promote services exports | 5 platforms |
| Number of new services export-focused trade missions or showcases | 8 missions/events |

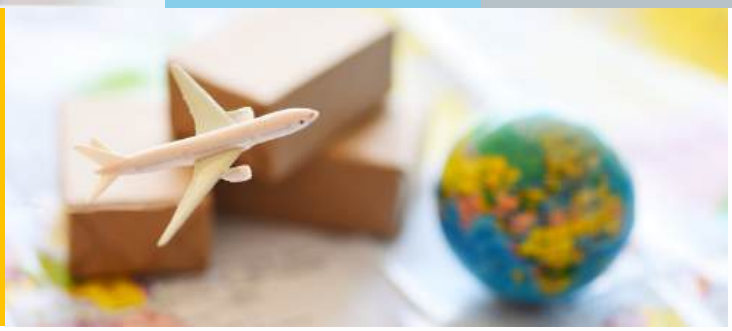
The NES 2026–2030 builds purposefully on the foundation laid by Saint Lucia's broader national services development initiatives, reinforcing the country's long-term vision of cultivating a vibrant, innovative, and globally competitive services economy. Recognizing the strategic importance of services in driving inclusive economic growth, technological innovation, and global market integration, the NES complements existing policy frameworks by placing targeted emphasis on strengthening the export dimensions of services. It translates national ambitions into actionable measures aimed at enhancing service provider competitiveness, facilitating international market access, modernizing regulatory and digital infrastructure, and expanding opportunities for women, youth, and rural entrepreneurs. By maintaining strong alignment with established priorities and advancing practical interventions that address market demands and evolving global trends, the NES ensures continuity of vision while sharpening Saint Lucia's focus on building a resilient, digitally empowered, and internationally recognized services export sector.

# Enabling Systems for Export Competitiveness, Innovation, and Resilience

The success of Saint Lucia's National Export Strategy 2026–2030 is underpinned by the development of robust enabling systems that support dynamic sectoral growth, facilitate market access, drive innovation, and build economic resilience. Strengthening these cross-cutting systems is critical to creating an export environment that is inclusive, competitive, sustainable, and digitally adaptive. The NES adopts a comprehensive approach to enabling systems, ensuring that both traditional sectors and emerging industries are supported by an integrated, future-fit ecosystem.



Building smart, resilient systems for export success



## Strategic Export Enablers

Strategic enablers strengthen existing export foundation for a more competitive, resilient, and innovative Saint Lucia — creating the systems needed to drive sustained export success.

## Results driven

Each enabling system is designed to deliver measurable improvements in export performance, business efficiency, and market readiness.

## Trade Facilitation and Logistics

Efficient trade facilitation and logistics are foundational to export competitiveness. Saint Lucia will modernize customs operations, strengthen risk management protocols, enhance border agency coordination, and advance implementation of its WTO Trade Facilitation Agreement commitments. Key priorities include the expansion of digital customs platforms, development of a national single window for trade documentation, and regional harmonization initiatives through CARICOM and OECS. Upgrading port infrastructure, strengthening cold chain systems for perishable exports, and improving inter-island and global shipping logistics will be prioritized to reduce transaction costs, enhance speed to market, and improve trade resilience.

## Artificial Intelligence and Emerging Technologies

The integration of artificial intelligence (AI) and emerging technologies across the export ecosystem will drive efficiency, innovation, and market responsiveness. AI will be deployed for supply chain optimization, predictive analytics, export credit risk assessments, digital marketing, and customer engagement. Capacity building initiatives will equip businesses and institutions with the knowledge to adopt AI responsibly, while also strengthening the cyber-resilience of trade facilitation systems and online transactions. Targeted support for the adoption of emerging technologies such as blockchain for traceability and IoT for smart logistics will be integrated into export support programs.



## Renewable Energy and Green Technology

Transitioning toward renewable energy and green technology is a strategic imperative for Saint Lucia's exporters. Adoption of renewable energy solutions in production, logistics, and processing will not only reduce operational costs but also enhance compliance with emerging carbon competitiveness standards, including the European Union's Carbon Border Adjustment Mechanism (CBAM). Promotion of energy-efficient manufacturing, eco-certification programs, and support for circular economy initiatives will position Saint Lucia's exports as climate-smart and internationally competitive.

## Export Finance and Insurance

Access to affordable and innovative export finance remains a barrier for MSMEs. The NES will support the expansion of export credit guarantee schemes, pooled insurance models, risk-sharing mechanisms, and access to working capital financing. Financial literacy programs, pre-export finance readiness training, and partnerships with regional development banks and private financial institutions will bridge the financing gap and enable broader participation of SMEs and startups in export markets.



# Innovation and Technology

Improving digital infrastructure, supporting digital entrepreneurship, and increasing e-commerce readiness are critical enablers of Saint Lucia's export performance. These foundational elements allow exporters to adopt e-commerce platforms, meet international compliance and traceability requirements, and engage securely in cross-border trade using electronic payment and invoicing solutions. Robust cybersecurity protocols are essential to build trust and safeguard digital transactions.

A strategic emphasis must be placed on research and development to drive innovation within priority sectors. This includes applied research for product development, market intelligence, and digital solutions that meet export market needs. Investment in digital skills, platform development, and digital tools will help firms adapt to changing trade dynamics and access new opportunities. Strengthening the innovation ecosystem requires a culture that supports experimentation, learning, and responsible risk-taking across both public and private sectors. Developing capable leadership and attracting diverse talent with expertise in emerging technologies will improve the ability of firms and institutions to respond to new market demands. Collaboration with academic institutions, regional partners, and industry stakeholders will support more effective innovation outcomes.

Access to support structures such as incubators, accelerators, and innovation labs will help entrepreneurs commercialise products and services with export potential. Establishing metrics to track innovation performance and benchmark against global indicators will provide feedback for continuous improvement and help position Saint Lucia as a competitive exporter in a digital, innovation-driven economy.



## Education, Knowledge, Skills, and Workforce Readiness

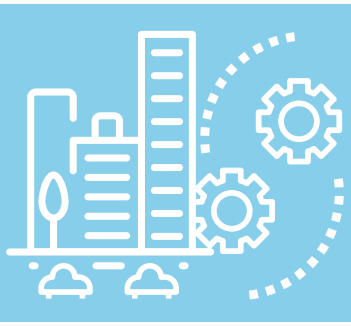
A future-ready workforce is essential for export transformation. TVET programs will be expanded and aligned to the needs of emerging sectors such as agro-processing, ICT services, renewable energy, tourism, and creative industries. National certification frameworks will be updated to align with global standards. Special focus will be placed on reskilling and upskilling displaced workers and supporting youth entry into emerging industries. Export entrepreneurship training, digital literacy programs, and innovation capacity building will be mainstreamed across education and workforce development initiatives.

## Quality Infrastructure and Standards

An internationally recognized quality infrastructure will be strengthened through expansion of laboratory services, testing and certification capabilities, standards development, and packaging innovation. SLBS and sector-specific agencies will collaborate to develop standards for food safety, digital security, green certification, and market-specific export compliance. Investments will be made to upgrade infrastructure and human capital within the quality system to ensure readiness for export certification demands.

## Institutional Coordination and Capacity Building

Strong institutional governance is necessary to implement the NES effectively. Export governance structures will be formalized, including National Export Councils, sector-specific committees, and inter-agency coordination mechanisms, guided by structured MoUs. Capacity building programs for Export Saint Lucia, Ministry of Commerce, line ministries, and private sector organizations will be designed to strengthen policy development, project management, monitoring and evaluation, and digital trade governance capabilities.



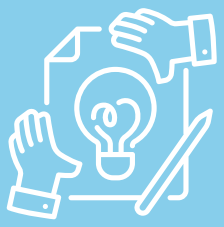


## Inclusive Trade

Ensuring that export growth benefits all segments of society is a fundamental principle of the NES. Targeted programs will promote the inclusion of women entrepreneurs, youth innovators, rural exporters, and diaspora communities in export markets. Gender equity, youth engagement, and regional development goals will be mainstreamed into export promotion strategies. Diaspora networks will be leveraged for market entry, mentoring, and investment mobilization initiatives.

## National Branding

A cohesive and future-facing national brand strategy will be implemented to enhance the visibility and appeal of Saint Lucia's exports. The "Brand Saint Lucia" initiative will emphasize authenticity, quality, creativity, sustainability, and resilience, positioning the country as a competitive, responsible, and innovative trading partner. Branding strategies will be fully integrated into sectoral export promotion plans, leveraging digital platforms, global partnerships, and diaspora engagement to amplify Saint Lucia's global presence.







# IMPLEMENTATION FRAMEWORK

The successful execution of Saint Lucia's National Export Strategy (NES) 2026–2030 requires a structured, coordinated, and agile implementation framework. This framework ensures that institutional roles are clearly defined, collaboration is strengthened across public and private stakeholders, and strategic actions are phased, resourced, risk-managed, and monitored for measurable impact.

Export Saint Lucia will serve as the lead implementing agency, working under the strategic oversight of the National Export Council (NEC). Export Saint Lucia will coordinate closely with sector ministries, industry associations, development partners, and private sector representatives. Dedicated sectoral working groups, supported by a Technical Secretariat, will drive operational coordination to ensure that interventions remain aligned with national export priorities.

The framework emphasizes the following pillars:

- **Phased and Prioritized Action**: Strategic actions will be sequenced to optimize resource allocation, achieve early wins, and maintain sustained momentum across the strategy period.

- **Monitoring and Evaluation (M&E)**: A comprehensive M&E system will track progress against defined KPIs and milestones. Bi-annual review forums and performance dashboards will be utilized. Where progress lags, corrective action plans will be developed collaboratively to realign efforts and maintain trajectory toward export targets.

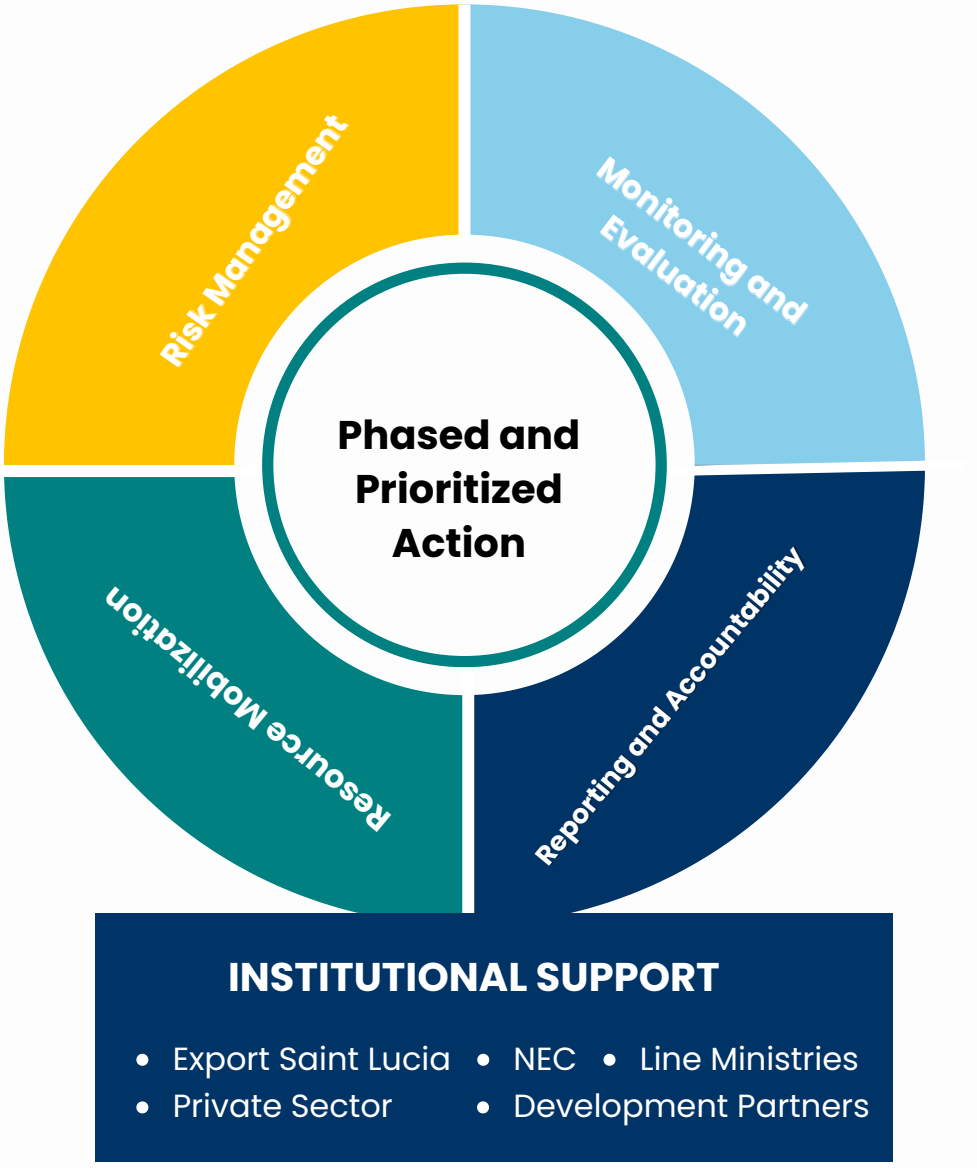
- **Risk Management:** A dynamic risk management plan will be embedded within implementation strategies. Risks — including global market volatility, climate impacts, and institutional capacity constraints — will be continuously monitored. Risk ownership will be assigned to sectoral leads, and escalation protocols will ensure timely mitigation.

- **Resource Mobilization**: Public-private partnerships (PPPs) and donor collaboration will be leveraged to mobilize financial and technical resources. An implementation resource plan will guide targeted mobilization efforts to ensure that interventions are adequately funded and supported.

- **Reporting and Accountability**: Regular reporting cycles will be instituted, with Export Saint Lucia submitting performance reports to the NEC and stakeholders bi-annually. An annual NES Progress Report will be published to ensure transparency, document lessons learned, and maintain public engagement.

- Strategic Communication and Feedback: A communication strategy will disseminate key achievements, reforms, and milestones. Additionally, structured stakeholder feedback mechanisms will be established to capture insights, identify emerging issues, and inform adaptive management practices.

By embedding principles of inclusivity, transparency, resilience, and strategic agility, this implementation framework ensures that Saint Lucia's NES is not only action-oriented and results-driven but also future-fit — capable of adapting to evolving global trade dynamics and sustaining long-term export competitiveness.




**Anchoring Saint Lucia's export transformation in strategic action, risk intelligence, and continuous learning**

## 1. Institutional Roles and Responsibilities

**Export Saint Lucia (ESL):** As the lead implementing agency, ESL will coordinate NES activities, facilitate stakeholder engagement, and monitor progress.

**Responsibilities include:**

- Developing annual work plans aligned with NES objectives.
- Coordinating with sectoral working groups and line ministries.
- Managing communication and reporting mechanisms.
- Serving as the Secretariat for the National Export Council (NEC).

**National Export Council (NEC):** The NEC will provide strategic oversight and policy guidance, ensuring alignment with national development goals. Comprising representatives from key ministries, private sector entities, and civil society, the NEC will:

- Oversight implementation of the NES
- Review bi-annual progress reports and evaluations.
- Facilitate high-level coordination among stakeholders.

**Line Ministries:** These ministries will integrate NES priorities into their sectoral plans, implement relevant initiatives, and report on sector-specific progress.
Private Sector and Industry Associations: Engagement with the private sector is crucial.

Their roles include:

- Identifying opportunities and challenges for NES implementation
- Providing feedback on policy impacts.
- Participating in capacity-building programs.

**Development Partners and Donors:** These stakeholders will offer technical assistance, funding, and share international best practices to support NES objectives.

## 2. Governance Structure and Coordination Platforms

**NES Steering Committee:** Chaired by the NEC, this committee will comprise representatives from ESL, key ministries, private sector, and civil society to ensure cohesive strategy execution. Responsibilities include:

- Overseeing the implementation of NES activities.
- Ensuring inter-agency coordination and collaboration.
- Addressing implementation challenges and bottlenecks.

**Sectoral Working Groups:** Focused groups for priority sectors (e.g., agriculture, tourism, manufacturing) will develop and oversee sector-specific action plans, ensuring alignment with NES objectives.

**Technical Secretariat:** Located within ESL, the Secretariat will handle day-to-day coordination, data collection, and reporting. It will also support the functioning of the Steering Committee and Sectoral Working Groups.

**Bi-Annual Review Forums:** Held every six months, these forums will:

- Assess progress against defined milestones.
- Facilitate knowledge sharing and stakeholder engagement.
- Inform necessary adjustments to strategies and action plans.

## 3. Implementation Phasing and Milestone Planning

- **Phase 1 (2026–2027)**: Strengthen governance structures, conduct baseline assessments, and initiate quick-win projects to build momentum.

- **Phase 2 (2028–2029)**: Scale up successful initiatives, strengthen institutional capacities, and expand market access efforts.

- **Phase 3 (2030)**: Conduct a comprehensive evaluation, consolidate gains, and plan for the next strategic cycle.

Milestones: Defined for each phase, including specific targets for export growth, market diversification, and capacity-building achievements.

## 4. Public-Private Partnerships (PPPs) and Donor Collaboration

- **PPP Development:** Identify opportunities for joint ventures in infrastructure, logistics, and value-added processing to enhance export competitiveness.

- **Donor Engagement:** Align NES priorities with donor programs to secure funding and technical support, ensuring complementarity and avoiding duplication.

- **Regional Collaboration:** Leverage CARICOM and OECS frameworks to access regional markets and share resources.

## 5. Resource Mobilization Strategy

**Government Funding:** Allocate budgetary resources to priority NES initiatives, demonstrating national commitment.

**Donor Contributions:** Pursue grants and concessional financing aligned with NES objectives, focusing on capacity building and infrastructure development.

**Private Sector Investment:** Encourage investment through incentives, risk-sharing mechanisms, and facilitating access to finance for exporters.
Innovative Financing: Explore mechanisms such as blended finance and impact investing to fund sustainable export projects.

## 6. Capacity Building and Institutional Strengthening

- **Training Programs:** Develop targeted training for exporters, government officials, and support institutions to enhance skills and knowledge.
- **Institutional Development:** Strengthen ESL and other trade-related institutions through organizational assessments and capacity enhancement plans.
- **Knowledge Management:** Establish systems for capturing and disseminating best practices, lessons learned, and market intelligence.
- **Monitoring and Evaluation (M&E):** Implement robust M&E frameworks to track progress, inform decision-making, and ensure accountability.

# Monitoring, Evaluation, Accountability, and Learning (MEAL) Framework

## 1. Revised MEAL Architecture

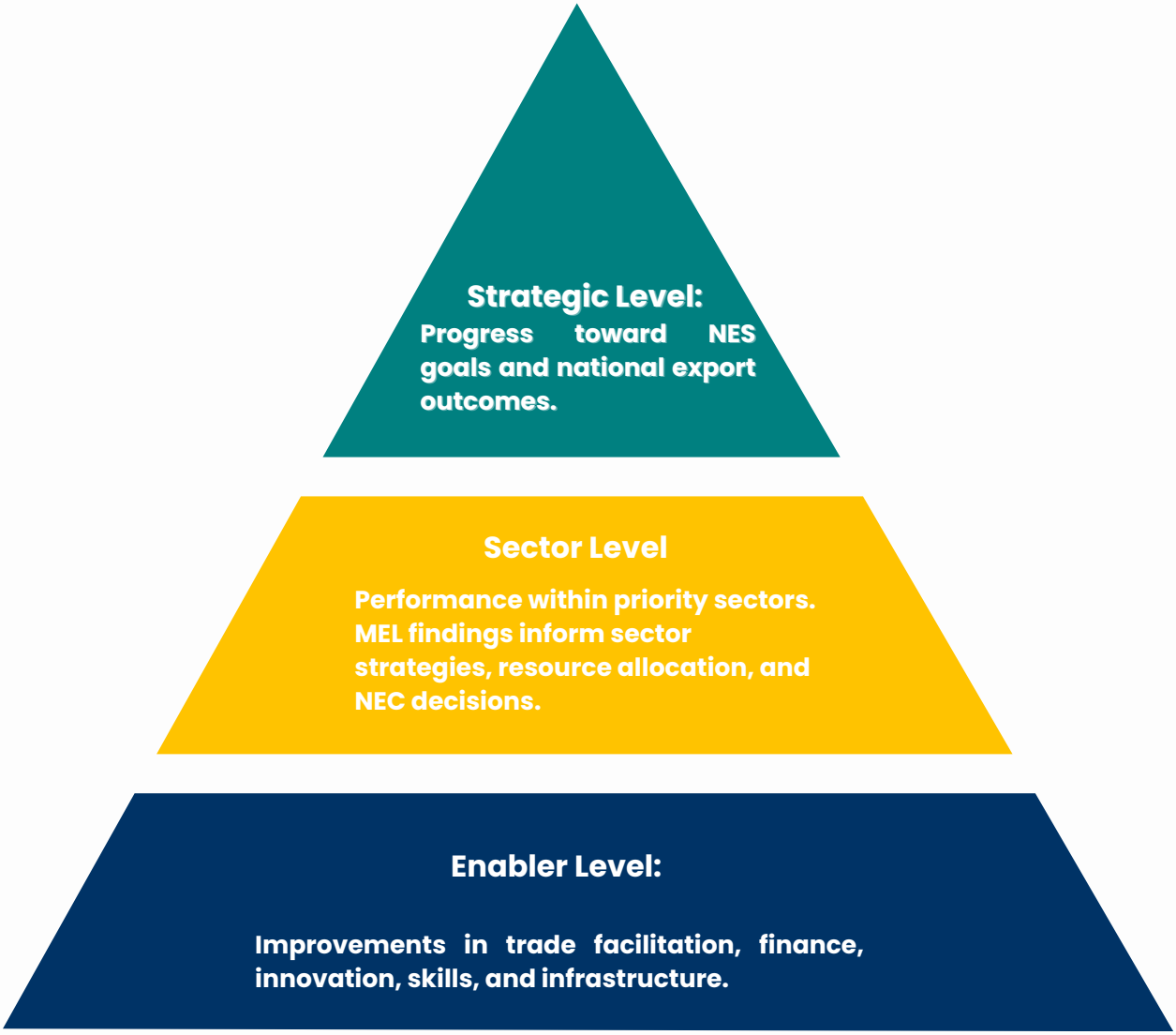
The NES 2026–2030 MEL system is designed to be agile, practical, and learning-driven, ensuring continuous alignment with strategic objectives and responsiveness to changing trade conditions.

**Key Features:**

**Central Coordination:** Export Saint Lucia will anchor the MEAL process, supported by the Technical Secretariat and sectoral working groups.

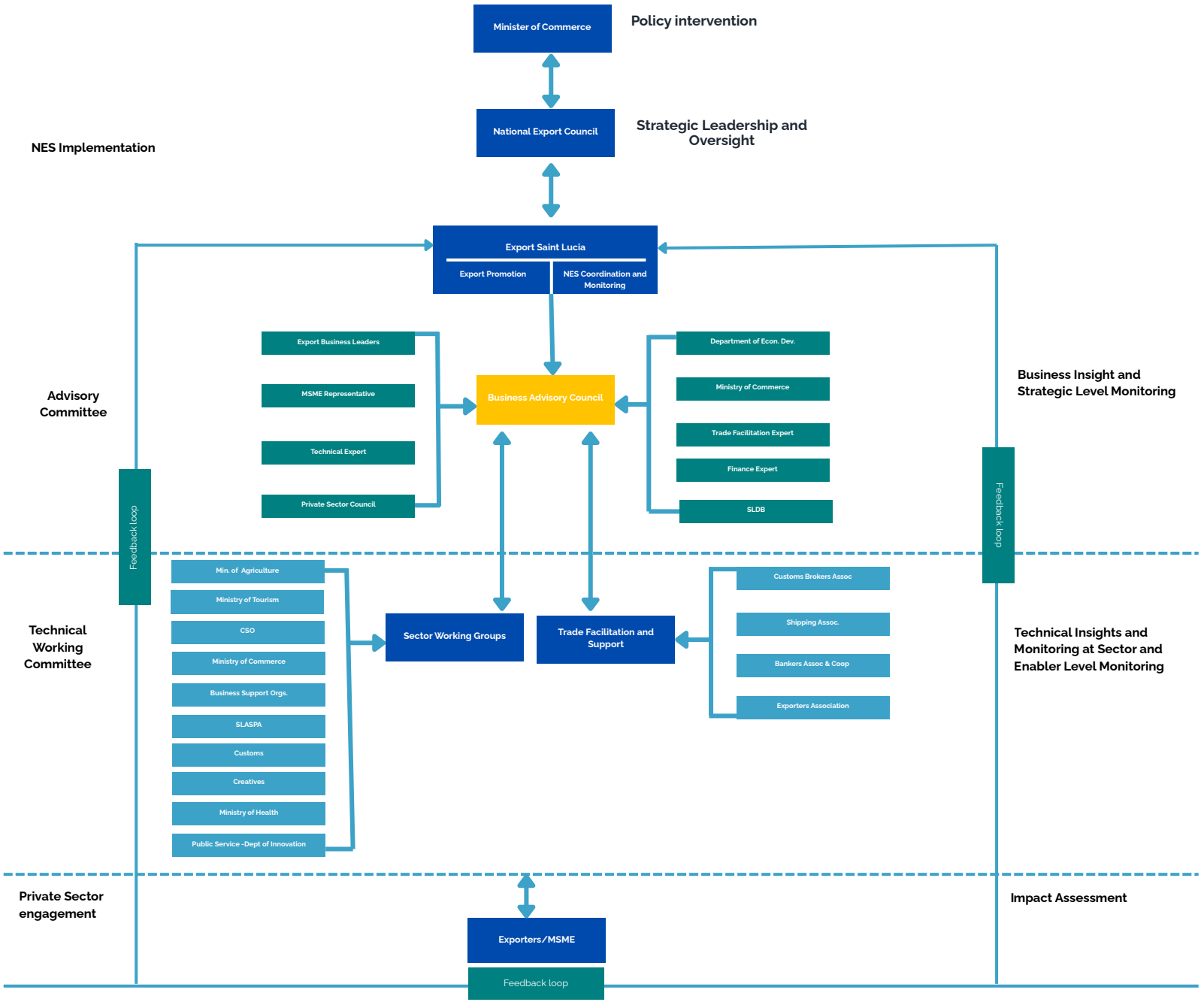
**Decentralized Data Collection:** Sector leads and key implementing agencies will gather sector-specific data and submit quarterly updates.

**Three Monitoring Levels:**



# Forum for high-level dialogue, collaborative problem-solving, and informed analysis

COORDINATION AND COLLABORATION MAP OF KEY PLAYERS



## NES Implementation Coordination Mechanism

The National Export Strategy 2026–2030 is supported by a coordination and accountability mechanism that ensures clear roles, regular feedback, and effective collaboration across public and private stakeholders.

The National Export Council (NEC) provides overall oversight and policy direction. It is responsible for maintaining alignment between the NES and national development priorities, addressing cross-cutting bottlenecks, and supporting resource mobilisation. The NEC reviews regular reports from technical and advisory structures, enabling it to make timely and informed decisions.

Export Saint Lucia, through the NES Secretariat, is the lead coordination body for implementation. The Secretariat supports the preparation of implementation plans, coordinates activities across ministries and agencies, and consolidates data on progress. It facilitates structured engagement with stakeholders and ensures that reporting flows effectively between the NEC and implementing partners. The Secretariat also works closely with the Department of Economic Development to ensure alignment with the national planning and budgeting cycle.

Two key structures support the implementation and continuous improvement of the strategy:

- The Sector Working Group is a single, multi-sectoral group made up of focal points from each NES priority sector. These representatives include technical officers from ministries, private sector actors, and support institutions. The group is responsible for collating implementation data, identifying challenges, and advising on areas where greater alignment is needed between sectoral initiatives and NES objectives. It also plays a role in surfacing interdependencies and overlaps across sectors to support more coordinated action.

- The Business Advisory Council (BAC) is a formal public-private mechanism that brings together business leaders, relevant government officials, and technical experts. It serves as a structured forum for providing real-time implementation feedback, private sector insights, and forward-looking recommendations to the NEC and NES Secretariat. The BAC strengthens the link between strategy and enterprise-level realities, ensuring that emerging market conditions and private sector concerns are factored into decision-making.

This coordination mechanism supports the broader monitoring and evaluation framework by enabling timely data collection, structured dialogue, and shared accountability. It ensures that implementation of the NES is not isolated, but embedded within institutional systems, aligned with national planning structures, and responsive to both public policy and market realities.

## 2. Indicators by Objective, Sector, and Enabler

| Area | Key Indicators | Related Enablers |
|---|---|---|
| Strategic Objectives | • Growth in total export value (%)<br>• Number of new exporters entering international markets<br>• Export market diversification index (number of new markets accessed)<br>• Export contribution to GDP (%) | • SME access to trade finance and guarantees<br>• Strengthened trade facilitation and logistics<br>• Policy coherence for export development<br>• Program development funding mobilized for NES initiatives |
| Priority Sectors (e.g., Agro-processing, Tourism, ICT, Creative Industries) | • Sector-specific export revenue growth (%)<br>• Share of value-added exports in total sector exports (%)<br>• Number of new certified export products/services (e.g., HACCP, organic, creative industry standards)<br>• Number of new sector investment projects facilitated | • Sector-targeted program development (sector upgrading programs, certifications, export-readiness initiatives)<br>• Sector innovation support and technology adoption<br>• Workforce skills upgrading tailored to sector needs<br>• Export-ready SME pipeline development |
| Enablers (Cross-Cutting Systems) | • Reduction in customs clearance time (%)<br>• Number of SMEs accessing export finance products<br>• Number of exporters trained in digitalization and innovation practices<br>• Share of NES program funding disbursed (%) | • Trade facilitation and logistics modernization<br>• Expansion of SME financing facilities<br>• National innovation hubs and e-commerce platforms<br>• Public-private partnership development<br>• Dedicated program development budgets for key NES initiatives |

| Enabler Area | Specific Focus Areas |
|---|---|
| Modernized Trade Facilitation and Logistics Systems | • Trade logistics infrastructure upgrades (ports, customs, warehousing)<br>• Trade facilitation reforms (single window systems, paperless trade)<br>• Reduction in customs clearance time |
| SME Financing and Export Credit Support | • SME access to export credit, insurance, and guarantee schemes<br>• Development of trade finance facilities (working capital, invoice factoring)<br>• Facilitation of blended finance mechanisms for SMEs |
| Innovation, Digitalization, and Technology Adoption | • Development of national innovation hubs for exporters<br>• Expansion of digital trade platforms (e-commerce, virtual market access tools)<br>• Sector-specific innovation grants and technical support programs |
| Export Readiness and Capacity Building Services | • Delivery of sector-specific exporter training and coaching programs<br>• Support for export readiness through internationally recognized standards, certification systems (e.g., HACCP, ISO), metrology services, and quality infrastructure to enhance product and service compliance.<br>• Mentorship, incubation, and export accelerator programs for SMEs |
| Access to Finance and Resource Mobilization (Including Program Development Funding) | • Government budget lines dedicated to NES program design and implementation Donor grants and PPP investments mobilized to fund NES initiatives<br>• Resource mobilization strategies targeting climate finance, impact investment, and regional development funds<br>• Tracking of program development funding disbursement rates and leverage ratios (public/private/donor mix) |

## 3. Feedback Loops, Data Systems, and Reporting Cycles

### Feedback Loops:

- Bi-Annual Sector Performance Reports:
  - Sector working groups submit updates to Export Saint Lucia every six months for review.

- Quarterly Technical Briefings:
  - Short, targeted updates to NEC Technical Secretariat to flag immediate challenges.

- Stakeholder Consultations:
  - Annual exporter consultations to validate findings and gather real-world feedback on NES implementation.

### Data Systems:

- Export Saint Lucia MEL Portal:
  - Develop a centralized, simple digital dashboard using Excel or low-code systems for real-time tracking.

- Agency Reporting Templates:
  - Standardized forms for ministries and sectoral agencies to streamline submissions.

- Trade Statistics Integration:
  - Use existing CSO and SLASPA trade data where available to avoid duplication.

### Reporting Cycles:

- Quarterly Sector Progress Snapshots (internal).
- Bi-Annual NES Progress Reports (for NEC, Cabinet, and funders).
- Annual Public Performance Summary (to maintain public transparency and accountability).

## 4. Mid-Term Reviews and Strategy Adaptation

**Mid-Term NES Review (end of Year 2):**

- Conduct a full independent evaluation of NES performance at the midway point.
- Assess relevance, effectiveness, efficiency, sustainability, and emerging risks.
- Identify areas requiring course correction (sector prioritization, resource allocation, external engagement).

**Strategy Adaptation Mechanism:**

- Based on mid-term review findings, the NEC will:
- Revise sector priorities if global demand or sector performance shifts.
- Reallocate resources to high-performing or high-potential sectors.

**Update the action plan and targets as needed.**

- Export Saint Lucia will document adjustments and communicate changes to all stakeholders.

## Integrating the NES into Government Work Programmes

The effective implementation of the NES requires integration into the strategic and operational work programmes of all relevant ministries, departments, and agencies. Ministries with export-related mandates will be required to align their planning, budgeting, and performance frameworks with NES priorities. Institutional responsibilities will be clearly defined and reporting will be structured through the National Export Council to support accountability, coordination, and results tracking. This approach positions the NES as a central organising framework for export development, rather than a stand-alone initiative.

## Strengthening Political Commitment and Policy Coherence

Political leadership is essential to maintain strategic focus, resolve policy bottlenecks, and secure the institutional alignment needed for effective implementation. Regular engagement with the political directorate will support high-level buy-in, enable cross-government coordination, and reinforce the NES as a national priority within the broader development agenda.

## Strategic Support and Financing Mechanisms

Successful implementation of the NES depends on robust systems of support. This includes building institutional capacity, enhancing digital trade infrastructure, and facilitating access to financing. A key area of focus will be the development of structured diaspora investment and financing mechanisms to support export-ready enterprises. This will be pursued in coordination with diaspora networks, financial institutions, and government partners, alongside ongoing efforts to mobilise funding from development partners and the private sector.

# FINANCING FRAMEWORK

The financing model for the National Export Strategy 2025–2029 outlines a structured, phased approach to resource mobilisation and implementation. It enables the prioritisation of public resources, targeted support from development partners, and coordinated delivery across government and private sector actors.

The model presents three investment scenarios, each linked to different levels of delivery scope, institutional reach, and expected outcomes:

**Conservative Scenario (EC$2.5 million over 5 years):**

- Provides minimum support for NES delivery. Resources are focused on core coordination, basic secretariat operations, and limited technical engagement. This scenario maintains functionality but offers restricted reach and responsiveness.

**Balanced Scenario (EC$4.5 million over 5 years):**

- Enables broader implementation with targeted support to key sectors, enhanced trade support functions, and some institutional strengthening. It facilitates improved responsiveness and moderate systems impact while remaining financially feasible.

**Optimistic Scenario (EC$7 million over 5 years):**

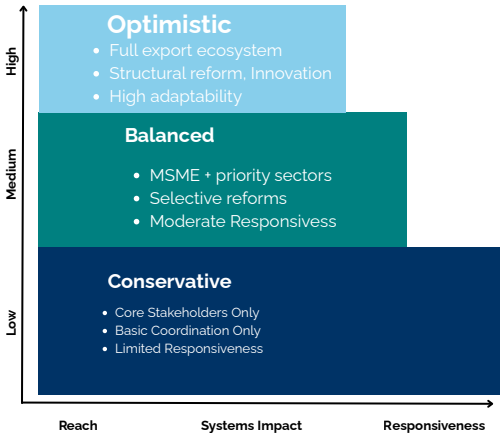
- Supports full-scale NES rollout, including structural reforms, innovation-driven programming, and wide institutional engagement. This scenario maximises impact by enabling high adaptability, multi-sector reach, and sustained momentum.

Each scenario corresponds to a tier on the NES Benefit Ladder, allowing policymakers to weigh ambition against capacity. The framework helps guide financing decisions over the strategy period and supports planning for domestic budgeting, development assistance, and private sector or diaspora investment.
This flexible structure ensures that the NES can be implemented progressively, while maintaining alignment with national development priorities and the overall strategic vision.

**Financing Scenarios – At a Glance**

| Scenario | 5-Year Estimated Investment | Delivery Scope |
|---|---|---|
| **Conservative** | EC$2.5 million | Minimum delivery: core coordination and essential activities |
| **Balanced** | EC$4.5 million | Expanded implementation: targeted sector support and reform |
| **Optimistic** | EC$7 million | Full rollout: system-wide delivery, institutional reform, innovation |

**Benefit Ladder**



# Reporting System and Responsibilities

Effective reporting is critical to ensuring that the National Export Strategy (NES) 2026–2030 remains adaptive, accountable, and results-driven. A streamlined reporting system will monitor progress systematically and facilitate timely interventions when necessary.

## Use of the Traffic Light Progress Reporting System

To simplify monitoring and facilitate rapid decision-making, a Traffic Light Reporting System will be employed across all strategic objectives, sector outcomes, and enabler indicators. This system uses a color-coded rating to indicate the status of performance:

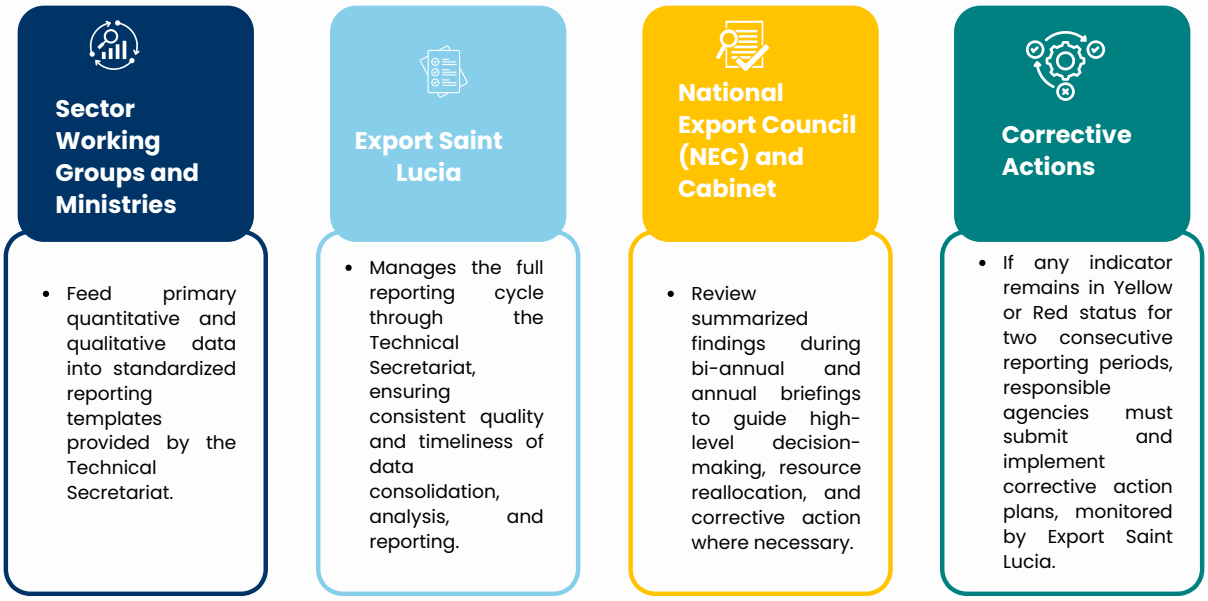
| Color | Status | Definition |
|---|---|---|
| 🟢 Green | On Track or Ahead | Activities and results are on schedule or exceeding planned targets. |
| 🟡 Yellow | Minor Issues Emerging | Moderate delays or minor shortfalls exist but can be corrected with adjustments. |
| 🔴 Red | Off Track | Serious delays or underperformance, requiring urgent intervention and possible strategic adjustment. |

Traffic light assessments will be reviewed each reporting cycle to maintain focus and transparency on NES progress.

# Reporting Cycle and Responsibility Matrix

| Action | Responsibility | Timing |
|---|---|---|
| Data Collection (for each indicator) | Sector Working Groups, Line Ministries, Export Saint Lucia | Quarterly |
| Traffic Light Assessment and Compilation | Export Saint Lucia MEL Secretariat | Quarterly |
| Bi-Annual Progress Reports (Consolidated) | Export Saint Lucia MEL Secretariat, validated by NEC | Every 6 months |
| Mid-Term Review and Strategy Adjustment | Independent External Evaluators, coordinated by Export Saint Lucia | End of Year 2 |
| Final Evaluation and NES Cycle Completion Report | Independent External Evaluators, validated by NEC | End of NES cycle (2030) |

## Core Reporting Responsibilities



# Risk Management and Sustainability

Effective export strategies must anticipate, prepare for, and respond to a broad range of risks and shocks. Saint Lucia's revised National Export Strategy (NES) 2026–2030 integrates a forward-looking risk management and sustainability framework to build competitiveness, resilience, and future readiness across sectors and trade support systems.

This approach aligns with leading international practices, including the WTO Trade Facilitation Agreement's resilience principles, UNCTAD's Sustainable Freight Transport Guidelines, and the OECD Green Trade Guidelines. It also responds to the emerging reality that sustainability and risk mitigation are no longer optional considerations, but central pillars of national and sector competitiveness

## 1. Institutional, Economic, and Climate-Related Risks

Saint Lucia's export development is exposed to a diverse risk landscape, including:

### Economic and Market Risks:

- Global recessions, currency fluctuations, inflationary pressures, and rising trade protectionism can reduce demand for exports.
- Volatility in key sectors such as tourism and food exports underscores the need for market diversification and value chain resilience.

### Institutional Risks:

- Coordination challenges among implementing agencies, regulatory fragmentation, and insufficient risk monitoring frameworks can hinder the NES's success.
- Limited capacity in trade facilitation institutions (e.g., customs, ports, logistics) may affect Saint Lucia's ability to respond quickly to external shocks.

### Climate-Related Risks:

- Saint Lucia's vulnerability to hurricanes, droughts, floods, and sea-level rise poses serious threats to trade infrastructure, agricultural exports, and tourism services.

- Climate change also affects the cost structure and reliability of export logistics, supply chains, and insurance coverage.

### Geopolitical and Global Supply Chain Risks:

- Increased geopolitical tensions, trade sanctions, shifting alliances may disrupt traditional export markets and supply routes.
- Events such as the COVID-19 pandemic have demonstrated the rapid and far-reaching impact of global shocks on small island economies.

## 2. Risk Mitigation Strategies across Sectors and Systems

The NES adopts a multi-layered risk mitigation approach, encompassing:

### Economic Diversification:

- Deepen export baskets within traditional and emerging sectors (e.g., services exports, creative industries, green products) to reduce exposure to single-market or single-product risks.

### Trade Infrastructure Strengthening:

- Prioritize investments in climate-resilient ports, customs modernization, e-commerce platforms, and efficient logistics systems.

### Institutional Coordination and Resilience:

- Strengthen the National Export Council's mandate for risk oversight and multi-agency collaboration.
- Develop a National Export Risk Register updated annually, supported by early warning systems tracking economic, climatic, and geopolitical indicators.

### Financial Resilience Tools:

- Expand access to trade finance instruments, including blended finance models, credit guarantees, and climate-aligned investment funds to cushion exporters against financial shocks.

### Scenario Planning and Business Continuity Planning (BCP):

- Encourage sector associations and exporters to develop scenario planning models and BCPs to manage export disruptions.

## 3. Resilience Integration in Priority Sectors

Recognizing the specific vulnerabilities and opportunities in Saint Lucia's key export sectors:

**Tourism:**

- Promote eco-certification programs, sustainable tourism models, and climate-resilient tourism infrastructure.
- Develop recovery protocols for a pandemic, climate, or geopolitical disruptions affecting travel flows.

**Agriculture and Food Exports:**

- Invest in climate-smart agriculture practices, post-harvest value addition, and resilient supply chains.
- Promote water management systems and hurricane-resistant crop varieties.

**Trade Infrastructure:**

- Prioritize green port initiatives (e.g., renewable energy use, waste management), strengthen warehouse and storage resilience, and modernize cold chain logistics.



## 4. Climate-Smart Exports, Green Trade Readiness, and Renewable Energy Links

The NES positions Saint Lucia to benefit from the rising global demand for sustainable and climate-smart goods and services by:

- Supporting the growth of green sectors such as renewable energy solutions, eco-tourism services, and organic products.
- Building green certification capacity among exporters to meet international standards.
- Facilitating access to climate finance to support green transition initiatives at the enterprise and sector levels.
- Promoting renewable energy use across export-related industries to reduce production costs and carbon footprints.

## 5. Export-Related Environmental Indicators and Monitoring

To ensure accountability and continuous improvement, the NES introduces an environmental monitoring mechanism with the following indicators:

- Share of exports from certified sustainable or eco-friendly products.
- Percentage of exporters accessing climate resilience support programs.
- Reduction in carbon emissions across trade logistics and export production systems.
- Increase in blended finance flows towards climate-smart export projects.

Through this comprehensive risk management and sustainability framework, Saint Lucia's NES 2026–2030 seeks not only to safeguard the gains of export growth but to build an agile, competitive, and future-fit export economy. The emphasis on resilience, climate readiness, and institutional coordination ensures that Saint Lucia can better withstand external shocks while positioning itself as a sustainable trading partner of choice.

# Communication and Engagement Strategy

The success of the National Export Strategy (NES) 2026–2030 hinges not only on the strength of its policies and interventions but also on the ability to foster broad-based national awareness, commitment, and ownership. A robust communication and engagement strategy is therefore critical to mobilizing Saint Lucia's exporters, public agencies, funders, and communities around a shared vision for export-driven growth.

The Communication and Engagement Strategy will serve as a practical tool to support NES implementation by building three core pillars: awareness, buy-in, and accountability. It will ensure that all stakeholders—whether a farmer in Mabouya Valley, an ICT entrepreneur in Castries, a ministry official, or an international development partner—understand the NES's objectives, see how they are connected to it, and, are motivated to contribute to its success. Recognizing Saint Lucia's unique development context, the communication approach will prioritize practical, people-centered messaging. It will focus on tangible outcomes such as jobs, opportunities, community development, and economic resilience, ensuring that the NES narrative resonates across sectors, generations, and communities.

The strategy will segment engagement efforts by key audience groups: exporters and SMEs, public agencies, donors and development partners, civil society organizations, and the broader public. It will leverage traditional media (radio, television), digital platforms (social media, websites, e-newsletters), business forums, stakeholder dialogues, and community outreach activities to reach different segments effectively. Special attention will be given to amplifying voices of youth, women entrepreneurs, and rural communities to reinforce an inclusive, countrywide ownership of the NES.

To maintain transparency and strategic discipline, a structured reporting and feedback mechanism will accompany communication efforts. Regular progress updates, stakeholder consultations, and visibility campaigns highlighting real success stories will foster a culture of accountability and trust. Export Saint Lucia, through its Technical Secretariat, will coordinate these efforts in collaboration with sector working groups, ministries, and private sector associations.

## Public Sector Orientation and Institutional Alignment

Structured sensitization and orientation will be conducted with all ministries and government agencies. This includes tailored buy-in sessions involving ministers, permanent secretaries, and designated NES focal points. These sessions will clarify each institution's role in export development and provide guidance on aligning sectoral work programmes with NES priorities.

To embed accountability and operational alignment, ministries and agencies will be encouraged to formalize their commitments through memoranda of understanding. These MOUs will define roles, responsibilities, and deliverables related to NES implementation and coordination. Public sector retraining will be integrated to strengthen understanding of economic planning functions related to export development.

### Private Sector Facilitation and Targeted Outreach

Targeted facilitation efforts will engage the private sector in meaningful dialogue and action planning. This includes collaboration with business support organizations, chambers, and sector associations to deepen understanding of NES opportunities and to promote collective ownership. Technical engagement will be supported through sector working groups and the Business Advisory Council.

### Inclusive Communication Tools and Channels

Communication efforts will use digital tools, national media, and grassroots methods to ensure wide reach. Campaigns will be designed for different stakeholder groups, including exporters, MSMEs, youth, diaspora communities, and rural entrepreneurs. Local champions and community leaders will be engaged to support message delivery and deepen public understanding.

This communication and engagement strategy supports transparency, public accountability, and alignment across sectors. It reinforces Saint Lucia's commitment to inclusive export development and provides the platform for a coordinated national effort under the NES 2026–2030.

Through strategic communication and authentic engagement, the NES 2026–2030 will not only chart the course for export growth but also embed itself as a national movement for opportunity, resilience, and shared prosperity.
The detailed Communication and Engagement Framework is provided in the Appendix to guide operational planning and implementation.



# Communication Approach



At the core of the communication approach are three interconnected pillars: Awareness, Buy-In, and Accountability. Together, these pillars guide how the strategy will reach and influence key target audiences: exporters and SMEs, public agencies, funders and development partners, and civil society organizations. Each group has a distinct role in building the export ecosystem and contributing to national competitiveness.

The strategy recognizes that effective engagement requires tailored communication channels. Accordingly, a combination of media outreach, digital platforms, structured briefings, and community-level engagement will be used to ensure that messaging is accessible, relevant, and action-oriented across different stakeholder groups.

Ultimately, the diagram reflects how strategic communication efforts will build the broad-based commitment necessary to drive Saint Lucia's export progress, foster collaboration, and deliver measurable results under the NES. It positions communication not as a supplementary activity, but as a vital enabler of national export success.

## Appendix 1: Action Plan

| Strategic Objective | Strategic Intervention | Action | Deliverable | Lead Agency | Timeline | Resource Note | KPI & Target |
|---|---|---|---|---|---|---|---|
| 1. Strengthen Business Ecosystem | Reform business regulations | 1.1. Streamline business registration processes | Updated business registration system | Ministry of Commerce | 2026-2027 | Within Ministry Budget | Reduce business start-up time to <5 days by 2026 |
| | Strengthen Trade Support Institutions | 1.2. Modernize Export Saint Lucia's SME services | Exporter Service Upgrade Plan | Export Saint Lucia | 2026-2027 | Requires donor funding support | 100 SMEs supported annually |
| | Improve Access to Finance | 1.3. Launch Export Credit Guarantee Scheme | Credit Guarantee Facility operational | Ministry of Finance, SBDC | 2026-2027 | Needs World Bank/CDB co-financing | $2M in SME export finance leveraged by 2027 |

# Appendix 1 -Action Plan

| Strategic Objective | Strategic Intervention | Action | Deliverable | Lead Agency | Timeline | Resource Note | KPI & Target |
|---|---|---|---|---|---|---|---|
| 2. Expand Productive Capacity | Sector Upgrading | 2.1. Implement Sector Modernization Programs (ICT, Creative Industries, Food & Beverage) | Sector Upgrading Action Plans | Export Saint Lucia, Sector Ministries | 2026-2027 | Suitable funding modalities to be identified | 5 sector programs launched by 2028 |
| | Foster Innovation | 2.2. Establish Innovation Hub and Voucher Scheme | Innovation Hub and SME Grant Fund | Ministry of Innovation, NSDC | 2026-2028 | Needs donor support | 20 innovations commercialized by 2028 |
| | SME Export Readiness | 2.3. Develop SME Export Readiness Program | Export Readiness Certification Scheme | Export Saint Lucia, Chamber of Commerce | 2026-2028 | Funded within existing programs | 50 SMEs certified export-ready by 2030 |

# Appendix 1 -Action Plan

| Strategic Objective | Strategic Intervention | Action | Deliverable | Lead Agency | Timeline | Resource Note | KPI & Target |
|---|---|---|---|---|---|---|---|
| 3. Ensure Sustainable & Inclusive Trade | Promote Green Trade | 3.1. Develop green standards and certifications | National Green Certification Scheme | Ministry of Sustainable Development, SLBS | 2026-2028 | Needs TA (Technical Assistance) | 20 green-certified products by 2028 |
| | Expand Inclusiveness | 3.2. Launch Women and Youth Export Development Program | Gender and Youth Export Support Facility | Export Saint Lucia, Ministry of Equity | 2026-2028 | Requires partial external funding | 30% of supported exporters women/youth -owned |
| | Build Resilience | 3.3. Upgrade Border Infrastructure and Systems | Enhanced Border Management System | Customs & Excise, SLASPA | 2026-2030 | Capital investment needed | 25% reduction in export clearance time by 2030 |

# Appendix 1 -Action Plan

| Strategic Objective | Strategic Intervention | Action | Deliverable | Lead Agency | Timeline | Resource Note | KPI & Target |
|---|---|---|---|---|---|---|---|
| Cross-Cutting | Trade Facilitation | 4.1. Implement Trade Single Window System | Fully digital border process operational | Customs & Excise, SLASPA | 2026-2030 | Funded under TFA support | 100% digital border processing by 2030 |
| | Skills Development | 4.2. Align skills training with export sectors | Skills-Export Sector Curriculum Developed | Ministry of Education, NSDC, SALCC | 2026-2030 | National budgeted | 500 trainees certified by 2030 |
| | Trade Intelligence | 4.3. Develop a National Trade Intelligence Portal | Live Market Intelligence Portal | Export Saint Lucia | 2026-2030 | Requires donor ICT funding | 1,000 users accessing trade info portal by 2030 |

# National KPI Dashboard

| Level | KPI | Target 2025-2029 | Data Source |
|---|---|---|---|
| Level 1: National Impact | Annual Export Growth Rate (%) | 5% average annual growth | CSO trade statistics |
| Level 1: National Impact | Number of Export Markets Penetrated | 3 new markets entered | Export Saint Lucia market reports |
| Level 1: National Impact | Percentage of Exports from Non-Traditional Sectors | Increase to 20% | Export Saint Lucia sector analysis |
| Level 2: Sector & Cross-Sector Outcome | Number of SMEs Certified Export-Ready | 15 SMEs by 2028 | Ministry of Commerce / Export Saint Lucia SME support program records |
| Level 2: Sector & Cross-Sector Outcome | Number of Green-Certified Products | 10 products by 2028 | SLBS and Ministry of Sustainable Development |
| Level 2: Sector & Cross-Sector Outcome | Increase in Services Export Value (%) | 15% growth by 2030 | National Accounts, Central Statistics Office |
| Level 3: Activity Output | Launch of Trade Intelligence Portal | Portal live by 2029 | Export Saint Lucia project reports |
| Level 3: Activity Output | Operationalization of Trade Single Window | System operational by 2028 | Customs & Excise, SLASPA |
| Level 3: Activity Output | Export Credit Guarantee Facility Established | Facility operational by 2027 | Ministry of Finance reports / Ministry of Commerce |
| Level 3: Activity Output | Innovation Hub Operational and Supporting SMEs | Hub launched and 20 SMEs supported by 2028 | Ministry of Commerce/ Export Saint Lucia reports |

**Risk and Funding Notes**

**Key Risks:**

- Institutional delays in procurement and project approvals.
- Limited absorptive capacity of implementing agencies.
- Global economic shocks affecting export sectors.
- Climate-related disruptions to border and trade infrastructure.

**Funding Priorities:**

- Export Credit Guarantee Facility (high priority for MSME access)
- Innovation Hub and SME Innovation grant support
- Border Management System upgrades
- Development of Trade Intelligence Portal

## Appendix 2 :Communication and Engagement Framework

### 1. Communication Objectives

The communication and engagement approach for the NES 2026–2030 is designed to achieve three strategic objectives:

| Objective | Purpose |
|---|---|
| Awareness | Build national understanding of Saint Lucia's export priorities, opportunities, and the role of exports in sustainable development. |
| Buy-In | Secure strong ownership and participation from exporters, investors, public agencies, and communities critical to the NES's success. |
| Accountability | Maintain transparency around NES progress, funding use, outcomes, and ensure active feedback loops with all stakeholders. |

## 2. Target Audiences

| Audience | Strategic Role | Engagement Priority |
|---|---|---|
| Business Sector (Exporters, SMEs, Investors) | Primary drivers of export growth | Promote sector-specific opportunities, finance access, market intelligence, incentives |
| Public Agencies (Ministries, Statutory Bodies) | Enablers through policies, regulation, services | Ensure inter-agency alignment, ownership of actions, commitment to implementation |
| Funders and Development Partners | Technical and financial support | Showcase readiness, results, impact potential to mobilize funding and technical assistance |
| Civil Society and Communities | Broader national buy-in and sustainability | Position exports as a source of inclusive growth, jobs, and community development |
| Youth and Women Entrepreneurs | New generation of exporters | Inspire participation, build capacities, and promote inclusive export development |

## 3. Messaging Approach and Narrative Framework

The NES communication narrative must resonate with the realities of a small, open economy focused on resilience, opportunity, and national pride.

**Core Messages:**

- "Exports Grow Saint Lucia"
  - (Exports drive jobs, investment, innovation, and sustainable livelihoods.)

- "Every Sector, Every Community Counts"
  - (The NES supports not just big businesses but farmers, artists, tech innovators, and small enterprises.)

- "Partnering for Prosperity"
  - (Government, business, and community working together to open new doors for Saint Lucia.)

- "Results You Can See, Opportunities You Can Seize"
  - (Promoting measurable success stories, real export wins, and opportunities for new entrants.)

**Tone and Style:**

- Aspirational but practical: show tangible benefits, not vague promises.
- Relatable: use language that is straightforward, people-centered, and community-driven.

**Inclusive:** actively reference opportunities for youth, women, rural businesses, and emerging sectors.

## 4. Communication and Engagement Channels

Multi-channel approach, using platforms that match Saint Lucia's media consumption patterns and institutional capacities:

| Channel | Use Case |
|---|---|
| Traditional Media (Radio, TV) | Key for reaching rural communities, older business owners, and general public awareness (e.g., interviews, NES updates on NTN, Radio 100, DBS, Choice TV) |
| Digital Media (Social Media, Website, E-newsletters) | Targeting youth, entrepreneurs, diaspora investors, and online-savvy exporters (e.g., Export Saint Lucia social media pages, NES microsite updates, short video explainers) |
| Sector Briefings and Business Forums | Quarterly or bi-annual targeted sessions by sector (e.g., tourism exporters' forum, agro-processing cluster meetings) |
| Community Roadshows and Town Halls | Localized events in communities tied to sector outreach (especially for agriculture, creative industries, rural tourism exporters) |
| Policy Dialogues and Stakeholder Workshops | Structured sessions for ministries, statutory bodies, and private sector leadership to align on policy, reforms, and action plans. |
| Donor and Development Partner Roundtables | Targeted presentations showcasing NES milestones, resource mobilization needs, and partnership opportunities. |

## 5. Ownership, Visibility, and Success Story Promotion

**Ownership Mechanisms:**

- Export Saint Lucia, through the Technical Secretariat, will coordinate all communication activities.
- Ministries and Sector Working Groups will appoint Communication Focal Points to feed into coordinated messaging efforts.
- Private sector associations (e.g., Chamber of Commerce, SLHTA, manufacturers' groups) will be engaged as amplifiers.

**Visibility Actions:**

- Launch a "NES Month" annually: profiling sectors, exporters, export champions.
- Feature real success stories:
- Example: A small agro-processor accessing a new market.
- Example: A young creative exporting digital services to Europe.

**Recognition Programs**: NES Exporter of the Year Awards tied to tangible export achievements.

**Success Story Framework:**

- Profile the person, not just the business.
- Show before/after scenarios (how NES support or reforms helped).
- Focus on impact for community/family/jobs — make it human, relatable, proud.

The goal is to make the NES feel like a national effort, not a government project.

# Appendix 3Traffic Light Reporting

Traffic Light Progress Reporting Template
(for Quarterly, Bi-Annual, and Annual Reviews)

### 1. Traffic Light Performance Scale

| Color | Status | Definition |
|---|---|---|
| 🟢 Green | On track or ahead | Progress is on schedule or exceeding planned targets. No major action needed. |
| 🟡 Yellow | Minor issues emerging | Some delays or shortfalls identified but corrective action can restore progress without major disruption. |
| 🔴 Red | Off track | Significant underperformance or delay. Urgent action, management intervention, or reprogramming required. |

## 2. NES Progress Summary Table

| Area | Indicator | Baseline | Target (Year) | Current Progress | Assessment of Progress | Traffic Light | Corrective Actions (if needed) |
|---|---|---|---|---|---|---|---|
| Strategic Objective | Export Value Growth (%) | | | | | | |
| Strategic Objective | Number of New Export Markets | | | | | | |
| Sector: Agro-processing | Number of Certified Export Products | | | | | | |
| Sector: Creative Industries | Growth in Export Revenue (%) | | | | | | |
| Enabler: Trade Facilitation | Average Customs Clearance Time (days) | | | | | | |
| Enabler: Access to Finance | % SMEs Accessing Export Credit | | | | | | |
| Enabler: Program Development | % NES Programs Fully Funded | | | | | | |

## 3. Narrative Sections

### 1. Highlights of Key Achievements
- Brief description of major progress milestones achieved in the reporting period.

### 2. Major Challenges Identified
- Explanation of issues encountered, linked to sectors, objectives, or enablers.

### 3. Corrective Actions Proposed
- Action plans to address any Yellow or Red flagged areas, including responsible agencies and timelines.

### 4. Cross-Sector or External Risks
- Identification of macroeconomic, geopolitical, or environmental risks affecting NES execution.

### 5. Opportunities for Acceleration
- Areas where additional investment, partnerships, or reforms could fast-track results.

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