STRATEGIC PLAN FOR REGIONAL DEVELOPMENT (SPRD)

BACKGROUND STUDY
REGIONAL AGROTOURISM POLICY

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June, 2010
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EXECUTIVE SUMMARY

E.1 BACKGROUND

The development of productive and fully integrated linkages between the Agri-Food Sector and Tourism in the Caribbean Region offers significant potential for repositioning and broad-based growth in the Agriculture value chain, and opportunities for channeling the region’s diversity and building-in genuine competitiveness and sustainability in the Tourism product.

Forging Agriculture-Tourism linkages capitalizes on the inherent ability of the Tourism sector to diversify the Caribbean economy, stimulate entrepreneurship, catalyse investment and assist in wider social development in local communities. Such linkages offer unprecedented opportunities to stem and reverse the declines in traditional agriculture, stimulate the rapid growth in ‘new’ agriculture and build resilience and sustainability of Caribbean economies. The latter is particularly critical for reducing the high levels of leakage in tourism (as much as 90% in the Bahamas to 50% in Barbados), preserving cultural identity, reducing poverty in local communities and enhancing local awareness and good practices with respect to climate change and environmental issues.

DEFINITION OF AGROTOURISM

For the purposes of this Study, Agrotourism is simply defined as the combination of rural / agricultural environments, farm commodities and tourism products and services. It therefore comprises the full range of product and service development options and commercial linkages possible across the Agri-Food – Tourism Value chain.

SCOPE OF THE STUDY

The Study on Agrotourism Policy forms part of the Strategic Plan for Regional Development (SPRD) for the Caribbean Community that will give strategic focus to the achievement of Community goals and objectives in keeping with the Single Development Vision. The Plan will address (i) self-sustaining economic growth; (ii) a full-employment economy; and (iii) spatially equitable economic growth within the Community as stated in the Single Development Vision that was approved by the Conference of Heads of Government in July 2007.

The scope of the Study covers four (4) Regional Public Goods which have been identified as critical drivers for the development of Agrotourism in the Caribbean Region. These are:

1. Trade Support
2. Investment Promotion
3. Product Development / Business Advisory Services
4. Intellectual Property / Research & Development
E.2 KEY FINDINGS AND RECOMMENDATIONS

E 2.1 STATUS OF AGROTOURISM IN THE CARIBBEAN REGION

Global trends (including food and dining trends; climate change, energy conservation, and environmental protection; nutrition, health and wellness; and the conservation of heritage) are all driving growth in AgroTourism. Current market research indicates a preference by tourists for a product and an experience that is authentic, linked to local foods, culture and heritage in a destination, and a willingness to pro-actively select and pay a premium price for such an experience. The top dining trends also show that internationally recognized hotel brands and restaurant chains as well as world-renowned chefs, are investing in their local agricultural and food sectors as part of their response to Climate Change impacts, and are experimenting with exotic tropical flavours and colours in foods typical of the Caribbean Region.

In the Caribbean, the huge potential for trade in food presented by the annual influx of 40 million visitors to the region, is as yet un-realized. Also untapped is the “ready-made” demand for locally sourced foods created under the hotel certification and accreditation schemes which specify the use of indigenous produce as a criterion for achieving 5 diamond status. Related to this are initiatives by agencies such as Fair Trade and the private sector (Virgin Atlantic and UK Travel Foundation) to drive visitor business to hotels which conserve water and energy, serve organic food and engage in sustainable tourism projects with local communities.

A review of available information shows that linkages between the food production sector and tourism are as low as 10-30% for several destinations and as high as 70-90% for some products and for specific market niches (such as small hotels, local restaurants and caterers, and larger hotels with a “Green” focus). Many countries have identified specific agricultural commodities which have competitive advantage, and are putting in place incentives and programmes to promote their production for the tourism sector. Work is also being conducted on regional value chains for commodities (including hot pepper, ackee, papaya and root crops) with potential for trade to both fresh and processed food (including Specialty Food) markets.

Significant opportunities also exist for trade with tourism in authentic craft and souvenirs, and natural beauty and wellness products and for the associated movement of service professionals in the rapidly growing spa sector.

Procurement systems employed by international and regionally owned hotel chains, as well as by other hospitality and foodservice establishments, favour consolidation of imported shipments, and provisioning of cruise ships outside of the Region, primarily through SYSCO, an international brokerage used by the majority of tourism players across the region. At national levels, however, several success stories and best practice models of Farmer-Hotel partnerships
exist, and give credence to the real potential for replication and expansion of these initiatives. Worthy of mention are the Nevis Model (a 15-year success story with the Four Seasons Resort); Sandals Resorts models in Jamaica and St. Lucia; UK Travel Foundation projects in Tobago, Dominican Republic, Jamaica and the OECS; the OXFAM Market Access Initiative in the OECS; and Goodfellows Farms in The Bahamas.

Analysis of the status of initiatives in Agro-and Rural-based tourism sites and attractions shows a multitude of exciting and successful initiatives in culinary events, nature and agriculture-based accommodation, tours and attractions; health and wellness service and product offerings; and agro-heritage sites and attractions. Noteworthy among these are Taste T&T, Jamaica’s Calendar of Food Festivals; plantation tours featuring cocoa, coffee, sugar cane and rum; rural trails and “Rutas” and natural health and beauty products utilizing cerasee, ginger, crabwood oil, organic coffee and cocoa, casareep, cassava, noni, and aloe.

Constraints to further development of this aspect of agrotourism include the absence of information, technical assistance and seed funding for investment; poor rural infrastructure, uncoordinated systems for certification of products and service providers that are relevant to the Caribbean reality and consistent with basic international requirements and standards; and an apparent weakness among community-based organizations and producer associations to work in organized professional groups to develop and manage projects, access markets or take advantage of available assistance and financial resources.

In terms of socio-economic impacts, the data indicate significant revenue generation for farmers through trade with the hospitality industry, and new employment opportunities for women and youth, and for men displaced from traditional agriculture in banana and sugar production. Benefits are also evident for hotels in terms of positive impacts on the “bottom line” (in the form of significant savings on food and beverage purchases), and improved profile as environmentally and socially responsible corporate citizens.

**E 2.2 STATUS OF POLICY AND INSTITUTIONAL FRAMEWORK**

Since 2004, there has been a yearly progression of positive and significant initiatives undertaken to strengthen the policy and institutional framework for agrotourism development in the Caribbean. These are:

2004: Presentation on agrotourism to the Caribbean Tourism Organisation (CTO) Board Meeting and subsequent appointment of IICA as a CTO Affiliate member;
2005: Official signing of an MOU to collaborate on Farmer-Hotel Partnerships between IICA and the Caribbean Hotel Association, and participation of 20 Caribbean companies and their products in CHIC 2006;

2006: The inclusion of agrotourism in the high-level CSME forum and subsequent inclusion of agrotourism in the CSME Implementation Plan;

2007: Presentation of a draft agrotourism strategy by IICA at the joint Ministerial of the Alliance of Ministers of Agriculture and COTED at the Caribbean Week of Agriculture (CWA) 2007, and endorsement of the proposals by the Ministerial;

Also in 2007: Presentation to the 6th meeting of the OECS Ministers of Tourism in response to an expressed urgency to expand linkages between agriculture and tourism. The Ministers underscored the need for the OECS member countries to deepen their relationship with IICA, as a means of securing maximum benefits for the OECS by way of technical assistance, advice and capacity building, in forging greater linkages between Agriculture and Tourism. They also noted the importance of collaboration between the IICA and Chambers of Agriculture being established in the OECS, in order to achieve the institutional link required for sustainability.


2006 -2009: Participation of Ministers and Permanent Secretaries of Tourism and Agriculture and formal inclusion of agrotourism issues in national agricultural strategies and policies, following the convening of stakeholder forums in seven Caribbean countries (Jamaica, St. Kitts & Nevis, Commonwealth of Dominica, Barbados, Trinidad & Tobago, Guyana and Suriname) under the OAS-funded IICA project “Strengthening the Tourism Sector through the Development of Linkages with the Agriculture Sector in the Caribbean Region.”

And as recently as June, 2010:

2010: Joint meeting of OECS Ministers of Agriculture and Ministers of Tourism to build greater synergies between agriculture and tourism, and to discuss associated issues of sub-regional shipping and transportation and an OECS Quality seal.

2010: Videoconference convened by the Agrotourism Cluster under the Office for Functional Cooperation of the Caricom Secretariat, to define an Agrotourism strategy for the Region, and involving Barbados (CTO, CDEMA, FAO, IICA); Belize (CCCCC and CFRAMP); Jamaica (Ministry of Agriculture, private sector); and Guyana.
E 2.3 IDENTIFIED GAPS AND STRATEGIC POLICY INITIATIVES

While all of the above initiatives bode well for support for Agrotourism development at both national and regional levels, there is an urgent need for Coordination, Engagement and Collective Action to address the following critical policy gaps:

- Investment promotion in agricultural production, postharvest management, agro-processing, and delivery systems to meet the volume, timeliness and quality specifications of identified products for the tourism industry;

- Skills development, training and institutional strengthening for the creation, strengthening, and ease of movement within the region, of a cadre of professionals to service all of the employment opportunities generated by agrotourism investments;

- Streamlining of all the certification and accreditation requirements along the Agri-Food – Tourism Value chain for goods and services, and for professionals employed along the chain;

- Removal of inter-regional barriers to trade between and among Caribbean member states, particularly with respect to livestock, dairy and fishery products;

- Review of provisions under the Economic Partnership Agreements and other multi-lateral and bi-lateral trade agreements that are inimical to local and regional sourcing of produce and processed foods and agricultural materials for trade with the tourism industry.

- Incentives to the tourism industry and investors to source locally and intra-regionally so as to reduce the leakage of foreign exchange on imports of food and beverages;

- Promotion of investment and technical support for the development of new sites and attractions and projects linking the Rural and Agri-Food Sector with Tourism;

- Development of innovative strategies for risk management and insurance to cover crop production, trade issues, insurance liability for visitors going into rural areas, inter alia;

- Analysis of the Trade policy – Innovation nexus to determine the strategy for protection of Intellectual Property in the Agri-Food sector and the promotion of innovation;
E 2.4 STRATEGIC POLICY INITIATIVES

TWO MAJOR STRATEGIC POLICY INITIATIVES (SPIs) are proposed to address these policy gaps. They are:

1. Consolidation of Legislative, Policy Institutional Framework for Increased Production, Processing and Distribution

2. Consolidation of Services in support of Investments in Agrotourism

E 2.5 CRITICAL NEXT STEPS

The critical “Next Steps” under the two strategic policy initiatives identified above are described as follows:-

TWO PRIORITIES are identified under the Strategic Policy Initiative (SPI) of Consolidation of Legislative, Policy Institutional Framework for Increased Production, Processing and Distribution. They are:

PRIORITY #1: Coordination, Engagement, and Collective Action

- Establishment of clear national Agrotourism Policy and Strategy in each country and in the OECS sub-region, harmonized with Regional Policy and Strategy
- Establishment of multi-stakeholder National Agriculture-Tourism Advisory Committees for strategic planning and monitoring
- Scheduled and formal dialogue at the regional level, for joint collaboration on Public-Private Sector initiatives (Ministries of Agriculture and Tourism, Environment and Health, CTO, CHA, FCCA, IICA, PAHO, CARICOM). One area which holds tremendous potential is the preparation of a joint proposal for Marketing the Caribbean as a Culinary Destination.
- Inclusion of Agrotourism investment proposals in CHTA’s Annual Investment Conference and the CARICOM Regional Agricultural Investment Forum (RAIF)
- Establishment of Bi-Annual forum for dialogue between Ministries of Tourism and Agriculture (similar to RIMSA for Health and Agriculture, and following on the example of the OECS Ministers of Tourism. Ministers of Tourism could be invited to the CWA and/or Minister of Agriculture to the Caribbean Week of Tourism held twice yearly)
• Expansion of existing national and regional Disaster Management Plans to include preservation of linkages between Agriculture and Tourism sectors, and increase the ability of communities to respond to geo-political events, natural disasters and other risks

PRIORITY #2: Consolidation of Food Production Supply and Distribution Networks

• Conduct of demand aggregate studies to determine nodes of supply and demand (Hub and Spoke approach), distribution networks and purchasing strategies, and select key commodities for regional trade
• Development of innovative alliances and strategies for intra-regional shipping (by air and sea freight) and delivery of fresh and processed commodities
• Identification of production areas and establishment of a critical mass of production for a basket of commodities required by the tourism foodservice sector
• Provision of financial and technical support for implementation of large-scale projects (to achieve critical mass) involving high-level technology production systems for high value horticultural commodities (greenhouse, hydroponic and organic production systems)
• Rationalisation and consolidation of existing Buyer-Seller trade and market information systems

TWO PRIORITIES are also proposed under the second Strategic Policy Initiative (SPI) - Consolidation of Services in support of Investments in Agrotourism

PRIORITY #1:
The most urgent action is the establishment of a Caribbean AgroTourism Resource Centre (CATRC) (as proposed to the joint Ministerial at the CWA in 2007).

The CATRC will provide leadership needed to support the development of competitive agrotourism products and services. An important role of the Centre would be to actively work with its partners in the following areas:
• tracking agrotourism markets and trends;
• assessing agrotourism fit with existing farming operations;
• working with public- and private-sector officials and policies;
• addressing financial considerations;
• establishing effective marketing programs;
• developing customer friendly service programs;
• creating responsive risk management programs;
establishing credible product and service quality standards;
building strategic partnerships; and
managing niche agrotourism product development opportunities.

Such a Centre would be therefore able to address in a coordinated fashion, many (if not all) of the cross cutting issues involved in the sustainable development of agrotourism in the Caribbean.

**PRIORITY #2: Identification and Accessing of Investment Support**

Investment support is needed for:

1. The establishment of the Caribbean AgroTourism Resource Centre (CATRC), and
2. The establishment of an Agrotourism Development Fund to support investment initiatives.

Sources which could be tapped include:

- Funds provided to regional and national governments and agencies for the implementation of international and bi-lateral trade agreements, and agreed programmes of support (for example, the Regional Investment Fund, CCCCC and market support arrangements under the CSME, EPA, ACS, ALBA, Mercosur and the like)
- Programmes of international donor and technical assistance agencies, including foreign embassies (for example, the assistance promised by Australia at the CHOGM (Commonwealth Heads of Government Meeting));
- National programmes (development funds) funded through Ministries of Government (including Agriculture, Industry and Commerce, Environment, Tourism, Health)
- Development financing available through Investment and Export Development agencies, Business Support Organisations, Manufacturers’ Associations and Chambers of Commerce;
- Equity and investment funds from commercial and development banks, National Insurance funds, Credit Unions; as well as creative revolving funding mechanisms for low interest rate financing of microenterprises
- Private sector sources, the latter including in the case of the tourism sector, NGOs and Tour companies involved in Sustainable Tourism, Green economies, Fair Trade, SME development inter alia.
E 2.6 IMPLEMENTATION FRAMEWORK

The Implementation Framework proposes a format for undertaking the recommended actions, with the identification of lead agencies responsible and a suggested timeline beginning by August 2011 and extending over a period of 5 years.
1. **INTRODUCTION**

The development of productive and fully integrated linkages between the Agri-Food Sector and Tourism in the Caribbean Region offers significant potential for repositioning and broad-based growth in the Agriculture value chain, and opportunities for channeling the region’s diversity and building-in genuine competitiveness and sustainability in the Tourism product.

Forging Agriculture-Tourism linkages will capitalize on the inherent ability of the Tourism sector to diversify the Caribbean economy, stimulate entrepreneurship, catalyse investment and assist in wider social development in local communities. Such linkages offer unprecedented opportunities to stem and reverse the declines in traditional agriculture, stimulate the rapid growth in ‘new’ agriculture and build resilience and sustainability of Caribbean economies. The latter is particularly critical for reducing the high levels of leakage in tourism (as much as 85% in the Bahamas to 50% in Barbados), preserving cultural identity, reducing poverty in local communities and enhancing local awareness and good practices with respect to climate change and environmental issues.

The development of sustainable AgroTourism linkages requires an inter-sectoral and inter-agency approach, with joint programming within a common policy framework and with adequate financial support. Key issues which need to be considered include:

- The achievement of critical mass in the production of food (both fresh produce and processed foods), landscaping and floricultural commodities and indigenous craft for the tourism sector, in compliance with international certifications and quality expectations

- The creation of strategic alliances across the region (using cluster approaches) for supplying the tourism sector with fresh produce, processed foods

- The reduction of foreign exchange leakage for food and beverage purchases (the second largest expenditure after accommodation);

- Promotion of investment for the development of new sites and attractions and projects linking the Agri-Food Sector with Tourism;

- Protection of the natural environment, particularly the natural resources upon which both agriculture and tourism are mutually dependent (environment, rural landscape, water and soil conservation, coastal and marine conservation);

- Conservation and enhancement of the cultural patrimony and traditional knowledge and
practices;
- Involvement and capacity strengthening of local communities in the planning and management of commercial activities and distribution of benefits, thereby enhancing social stability and food security

An AgroTourism Strategy for the Region represents a strategy that maximizes the development impact of Agriculture and Tourism on national and regional economies. The issues involved require commitment to regional dialogue AND ACTION.

1.1 Scope of the Study

The Study on Agrotourism Policy forms part of the **Strategic Plan for Regional Development (SPRD)** for the Caribbean Community that will give strategic focus to the achievement of Community goals and objectives in keeping with the Single Development Vision. The Plan will address (i) self-sustaining economic growth; (ii) a full-employment economy; and (iii) spatially equitable economic growth within the Community as stated in the Single Development Vision that was approved by the Conference of Heads of Government in July 2007.

The scope of the Study covers **four (4) Regional Public Goods** which have been identified as critical drivers for the development of agrotourism in the Caribbean Region. These are:

5. Trade Support
6. Investment Promotion
7. Product Development / Business Advisory Services
8. Intellectual Property / Research & Development

Under **Trade Support**, procurement systems and the potential demand of land based and cruise tourism for identified agricultural goods and services from the Caribbean, are examined. The gaps which need to be addressed, and the policy response required to support trade and distribution, are identified.

In the area of **Investment Promotion**, the provision of technical and financial support to private entrepreneurs to develop commercially viable agro-tourism projects, is one of the key issues that are critical to the sustainable development of Agro-tourism in the Caribbean. The Study identifies the areas for greatest potential for investment at national and regional levels, analyses the key constraints to investment, and recommends policy measures for promotion of investment in agrotourism.
Given the emergent nature of the Agrotourism Sector in the Caribbean, **Product Development and Business Advisory Services** are essential in order to guide and assist potential investors. The establishment of a Caribbean AgroTourism Resource Centre is proposed. The implementation mechanisms for the establishment and management of this Centre include a role for the Office for Functional Cooperation (through the Agriculture Cluster) at the CARICOM Secretariat. The establishment of a virtual support network for sharing and managing information among a *Community of Practitioners* via an Caribbean Agro-tourism Portal will form an essential part of Product Development and Business Advisory Services.

Intellectual Property issues permeate the development of agro-tourism particularly with respect to the development of Agro-Heritage, Culinary and Health & Wellness ventures. The Study addresses policy issues related to protection of intellectual property, as it relates to economically important and endangered indigenous plant and animal species, culinary heritage and traditions, Caribbean knowledge and traditions in the international botanicals and wellness industry, national and regional agro-heritage sites (particularly those related to settlements of Maroons, Caribs and Garifuna indigenous peoples).

### 1.2 Definitions of Agrotourism

*In its purest sense*, AgroTourism refers to travel which combines rural settings with products of agricultural operations – all within a tourism experience that is paid for by visitors. Agrotourism provides “rural experiences” to travelers with the goal of generating revenues for farmers and surrounding communities. These experiences typically include a wide range of attractions and activities that take place in agricultural areas. Important ingredients of such “rural experiences” include open spaces, low levels of urban or industrial development, and opportunities for visitors to directly experience agricultural, pastoral, and natural environments.

The full range of agrotourism product and service development options can be categorized within three broad themes – fixed attractions, events, and services (Table 1.1).

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Many terms have been used to convey the idea of agrotourism. These include agricultural tourism, rural tourism, farm tourism, community tourism, and agri-entertainment. For this study, Agrotourism is simply defined as the combination of rural / agricultural environments, farm commodities and tourism products and services.

The concept of Agrotourism LINKAGES refers to the interactions and trading arrangements along the tourism value chain take the form of direct transactions with operators and
entrepreneurs in the rural community, and also exist within complex trade and distribution networks, across distance and time, at national, regional and international levels.
2. CURRENT STATUS OF AGROTOURISM IN THE CARIBBEAN

This section describes global trends which are triggering a demand in tourism and hospitality sectors for Caribbean food products and for Caribbean experiences rooted in and linked to agricultural production and rural life.

2.1 Global Trends Influencing Growth in Agrotourism

2.1.1 Food and Dining Trends

The International Culinary Tourism Association stated in 2002 that Culinary Tourism is the *hottest trend in leisure*, embraced by savvy tourism planners around the world” and is “...a *key factor* in differentiating the vacation experience”. Culinary Tourism is taking the industry by storm. In an article entitled “Food Tourism is on the Boil” Fiona Jeffery, Group Exhibition Director of World Travel Market, undertook independent research with 2000 people throughout the UK of all ages and socio economic groups, said: “Food tourism today is where eco-tourism was 20 years ago; people are starting to take an interest.......“Although the research was carried out on behalf of World Travel Market was in the UK, it is representative of a new and growing phenomenon within the international industry. The World Travel Market indicated in 2005 that 9 out of 10 Brits surveyed indicated that eating traditional dishes was a “very important” part of a holiday. A staggering 86% of Brits quizzed said they enjoyed local foods when abroad. Moreover, holiday culinary experiences influenced their weekly grocery list on return to their country.

There is also a growing segment of travellers who go on vacation in search of extraordinary culinary experiences and international chefs now travelling and filming reality shows and competitions featuring new and exciting food and taste sensations. These culinary tourists, referred to as *foodies*, seek unique and memorable food and drink experiences whether they be urban or rural. They go to restaurants, wineries, breweries, delis, road-side stands or food trucks. Some culinary tourists train with the chefs from the best restaurants, go to cooking schools and tour herbal gardens and farms that show where the food comes from.

One of the top food trends for 2006 (as identified by Robin Uler, senior vice president of food & beverage, spas and retail services, and Brad Nelson, vice president of culinary and corporate chef for Marriott International, Inc.) is that diners are looking for purity of product: fresh, wholesome and locally grown.

Dining trends are increasingly being influenced by climate change and social responsibility with respect to environmental conservation. The concept of “Living La Vida Locavore” viz. eating
locally and seasonally, both at home and in restaurants” is evidenced by two of the Benchmark Hospitality's Top Five Dining Trends for 2009. Trend #1 states "It doesn't Get Any Fresher Than Farm-to-Table - Organically grown produce pulled fresh from the earth that morning, farm-fresh eggs collected before breakfast, and locally produced, hormone-free meats are what consumers will be eating in 2009 - in restaurants and at home. Trend #5 refers to Footprints on Mother Earth and states that “Farm-to-table organically grown cuisine consumed locally reduces green house gas emissions and minimizes shipping requirements, helping to stabilize the earth's environment by starting in our own 'back yard.'

Many chefs are partnering with their local farmers, purchasing product grown practically in their own back yards. In Anguilla for example, arrivals increased by 12% as a result of “foodies” flocking to CuisinArt Resort and Spa to eat fresh vegetables grown in hydroponic greenhouses and organic gardens. Tours of the hydroponic greenhouse are made available to guests four times a week, where the cropping techniques and hydroponic cultures are described. The guests always remark about the tasty salads they eat in the restaurants. One restaurant, the "Hydroponic Café", serves lunches of fresh salads picked from the greenhouse.

At Stowe Mountain Lodge in Vermont, Chef Sean Buchanan, an advocate of the local farm movement, escorts guests to his favorite farms, buys the produce, and then returns to the Lodge to teach a two-hour cooking lesson followed by a four-course dinner. The Golden Door Spa at The Boulders Resort in Scottsdale, Arizona, uses the products in its organic garden for services such as cucumber and mint in the Seasonal Sugar Scrub. “We encourage our guests to visit the garden to take the time to enjoy, meditate, and relax; and to see, touch, and smell the strawberries, tomatoes, herbs, citrus trees, grapes, and jalapenos,” says Spa Director Jennifer.
Wayland-Smith. At **The Spa at Camelback Inn in Scottsdale, Arizona**, a JW Marriott property, which recently completed a $50 million renewal, there are organic herb gardens with cozy fire pits and a new menu focusing on fresh, local, and organic ingredients.

Farmers are also establishing their own restaurants. Such is the case of Founding Farmers in Washington, a 2-storey, 8,500 square foot Certified Green Restaurant which serves fresh Farm-to-Table American-inspired true food and drink. The restaurant features Gold Standard design criteria complete with LEED Certification (*Leadership in Energy and Environmental Design*) and is a partner of Carbonfund.org, supporting global climate-friendly renewable energy projects.

The Slow Food Movement is also having positive impacts on the utilization of local foods. The Movement works to defend biodiversity in food supply, spread taste education and connect producers of excellent foods with co-producers through events and initiatives. Slow Food believes that the enjoyment of excellent food and drink should be combined with efforts to save the countless traditional grains, vegetables, fruits, animal breeds and food products that are disappearing due to the prevalence of convenience food and industrial agribusiness.

Through the [Ark of Taste](#) and [Presidia](#) project (supported by the [Slow Food Foundation for Biodiversity](#) and [Terra Madre](#)), Slow Food seeks to protect the world’s invaluable food heritage. By reawakening and training their senses, Slow Food helps people rediscover the joys of eating and understand the importance of caring where their food comes from, who makes it and how it is made. Convivium activities introduce local foods and producers to both members and non-members, while Taste Workshops offer guided tastings with food experts. School initiatives like Convivium school gardens offer our youngest eaters hands-on learning experiences about the food they eat and grow themselves.

Slow Food created the [University of Gastronomic Science](#) to offer a multidisciplinary academic program in the science and culture of food. UNISG is another way in which Slow Food brings together the innovations and research of the academic and scientific world and the traditional
knowledge of farmers and food producers. Slow Food also organizes fairs, markets and events locally and internationally to link producers with markets and to showcase products of excellent gastronomic quality and to offer discerning consumers the opportunity to meet producers.

The impact of Food Network cable television programmes and the Internet has resulted in transformation of the average home shopper into a gourmet cook in his/her own right at home as specialty foods have become \textit{an affordable indulgence}. These trends are opening up opportunities for new flavours and colours typical of the Caribbean, including fruits such as papaya and pitaya; ginger; hot pepper and spice products; culinary herbs – lemon grass, cilantro and “Shado beni”. The publication of international award winning books such as \textit{Nyam Jamaica} (which takes readers through culinary agrotourism experiences across Jamaica), as well as several other cookbooks, are also driving demand for Caribbean ingredients.

In the processed food category, trends in the hot pepper/spices segment of the industry, for example, indicate that the demand for hot spices has increased by over 200\% in the past 20 years and that this increase in expected to continue as the demand for hot and spicy products continues to drive the interest of large food manufactures to explore the flavour.

The market segments for hot pepper products include: supermarkets – pre-seasoned and rotisserie meats; Food service – Quick service restaurants, causal dining; Snack Manufacturers; Food Processors; and Spice blenders. In addition value added pepper products used by food and food ingredient manufacturers include Mashed wet; Mashed dry; Mash wet filtered; Flakes; Powder and Extracts. There are also new innovations such as Hot pepper vodka, Pepper cake, Chili mango bubble gum, Pepper ketchup, Pepper tuna, sardines and corn beef, and pepper-dusted chocolate truffles.

It is predicted that the demand for pepper in all forms will increase due to:

- Sophisticated consumers seeking to experience new flavours from hot pepper
- Medical research seeking to identify medical benefits of hot pepper
- Health conscious consumers seeking natural cures
- Food industry in their drive to produce Nutaceutical foods
- Food manufacturers seeking to produce new innovative foods.
There has also been a shift in market focus from the retail market to the foodservice industry across the Caribbean and particularly in the United States. According to one Jamaican Specialty Foods Exporter, “48% of our sales were to the Food Service industry in the US which is a US$1B market”. “….the prohibitively high cost of retail glass is avoided by packaging in 1L, 1-gallon or 5-gal pails or 60-gal drums. Moreover, institutions such as prisons and hospitals offer tremendous potential and Caribbean processors can come in at an attractive and competitive price…..”

Caribbean restaurants in the USA, UK and Canada represent an important driver for the export of Caribbean Specialty Foods. Restaurants such as Darden’s Bahama Breeze for example, feature Caribbean cuisine, and provide a market for institutional sizes of jerk sauces and seasonings and other products. At the regional level, the Quick Service Restaurant industry is worth US$325 million per annum in Jamaica, US$200 million in The Bahamas and US$155 million in Trinidad and Tobago. The most popular food in this industry was chicken and most of the meals required some form of hot and spicy ingredients.

2.1.2 Climate Change, Energy Conservation and Environmental Protection

Nature and Agricultural-based tourism is the fastest growing segment in travel in the US with a 30% increase in last decade. Tourists are fast becoming the newest diversification crop on farms across the USA, Europe and SE Asia, allowing farmers to reap revenues far in excess of returns from traditional crops. An Article in Time Magazine October 2005, entitled “That’s Agritainment” quoted tourism receipts of $200m for farms in New York, $70 million for Hawaii and $60m for Vermont.

Consumer trends driving the growth in farm and nature-based tourism include increasing demand for:

- Authentic experiences – culture, cuisine, outdoor life
- Cultural experiences – historical, outdoor
- Soft Adventure – eco and heritage travelers and rural tourists - It is estimated that 3% of all international tourists travel for rural tourism purposes. The range of products on offer to rural tourists is expected to increase significantly in the next 5-10 years with the growth of agrotourism emerging as a clear trend (World Tourism Organization “Tourism 2020 vision”).
- Togetherness – friends and family fun- families are taking shorter vacations with interests that include history and/or cultural experiences, eco-tourism, arts and crafts, “special
experiences,” outdoor life, and nostalgia that promotes searches for roots and the “time that was” (Purdue Tourism and Hospitality Centre 2001).

- Use of the Internet for planning and booking vacations

In Austria, France, Italy, Switzerland and South East Asia, farm-based tourism is reaping millions for farmers (Time Magazine, Oct. 2005). EuroGites, the European Federation for Farm and Village Tourism, offers agrotourism experiences from a choice of among 24 countries of Europe. Their “Country Tourism” offering includes:

- Farm-Accommodation
- Accommodation in private homes in rural areas
- Either B&B or Self-Catering units
- Traditional Rural Gastronomy
- Activities related to the accommodation

The economic impact for Europe is:

- 400,000 accommodation units
- 3,600,000 bedplaces (2x the total capacity of Spain as second most important tourism destination in Europe)
- 900,000 direct or indirect jobs
- 150,000 million EUR income in rural areas.

Through its structuring of 28 professional associations of rural tourism, EuroGites provides an exemplary range of attractions and activities for the avid eco- and heritage travellers. The Canadian Agri-Tourism Network formed in 1998 is also actively developing its agrotourism industry, investing in farm vacations and rural community-based activities such as the "Get Out of Town" Harvest Day in Ontario.

2.1.3 Nutrition, Health and Fitness Trends

Fitness and Nutrition are important global trends driving consumer demand for health and wellness vacations. Problems of obesity and lifestyle related diseases are prevalent worldwide, and more increasingly in the Caribbean region. The obesity rankings by WHO (Forbes, February 2007) of the world’s fattest countries show several Caribbean countries falling within the first 100 (Table 2.1).

Health consciousness has a tremendous influence on the growing demand for specialty and gourmet foods. The increasing demand for foods high in energy and nutritive value, promoting weight loss, or slowing down the effects of ageing and CNCDs (chronic non-communicable diseases) has led to consumers purchasing the following types of items:
- Natural and low-calorie sweeteners – honey, brown sugar, stevia
- Herbal teas – green tea, Yerba mate, Rooibos
- Nutraceuticals – noni and aloe-based beverages
- Green foods and herbs
- Organic foods
- Dark Cocoa products
- Red and purple root vegetables and fruits

Industry experts have recorded exponential growth in the health and wellness/spa tourism sector in the last decade (Zimmer Associates International, 2006). The health and wellness/spa industry is currently estimated to be worth US $40 billion, and is considered to be still in its infancy. Industry experts expect spas to expand promotion of travel concepts such as honeymoon spas, mind/body/spirit holidays and medical/spa travel. Men now generate 25% of total spa revenues. (Spa Finder, Forbes.com, 2006).

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>RANK</th>
<th>% of Overweight 15 yrs +</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barbados</td>
<td>12</td>
<td>69.7</td>
</tr>
<tr>
<td>Trinidad and Tobago</td>
<td>20</td>
<td>67.9</td>
</tr>
<tr>
<td>Jamaica</td>
<td>49</td>
<td>57.4</td>
</tr>
<tr>
<td>Saint Lucia</td>
<td>51</td>
<td>57.3</td>
</tr>
<tr>
<td>Saint Kitts/Nevis</td>
<td>59</td>
<td>56.1</td>
</tr>
<tr>
<td>Antigua and Barbuda</td>
<td>62</td>
<td>55.5</td>
</tr>
<tr>
<td>Grenada</td>
<td>75</td>
<td>53.3</td>
</tr>
<tr>
<td>Saint Vincent &amp; the Grenadines</td>
<td>87</td>
<td>50.6</td>
</tr>
</tbody>
</table>

An IDB Report (2006) proposed that Caribbean branded herbal remedies, holistic and alternative therapies present significant opportunities for the development of a sustainable health and wellness tourism industry in the region. Alternative health and wellness products and services have proven to be a market segment with strong global demand. This segment exhibits superior prospects for long-term market growth with high value-added potential. “Caribbean branded alternative health and wellness products and services are the area with perhaps the greatest medium and long-term opportunity for the Caribbean to increase multi-sector employment, not only in health and wellness tourism, but also in herbal agriculture, research and development in pharmaceutical and herbal remedies, the bottled water industry, and holistic and alternative therapies.” As these segments are not dependent upon healthcare
insurance reimbursement, and are not as price sensitive as medical tourism, they are much more attractive for development within the current demand structure.

The rich heritage of the Caribbean is reflected in its biodiversity, 80% of which represents plants which are being exploited in the $8 billion dollar international complementary and alternative medicine industry. These trends therefore bode well for the development of future Caribbean enterprises because the forecast is that the demand for restorative and healing services provided by spas is likely to continue to grow exponentially over the coming decade.

The concept of **Accessible Tourism** is becoming more and more important with the billions of tourists travelling to the Caribbean and Latin America seeking medical treatment and wellness experiences. Recent data indicate that 1.2 billion UK tourists are travelling the world. What this means for agrotourism is a potential demand for sites and attractions featuring natural landscapes, fresh and healthy local food, herbal teas, and spa facilities with indigenous spa products and services. Tourists coming to the Caribbean for medical treatment represent long-stay visitors since patients invariably travel with companions or family members and take advantage of the destination to recuperate in the country.

### 2.1.4 Growth in Heritage and Community Tourism

The rich heritage of the Caribbean, particularly the OLD Agriculture represents a tremendous resource for the development of heritage tours for the NEW tourist who is experienced, mature, independent and sophisticated, and interested in sustainable and natural products and services. Cultural heritage tours emphasize authenticity and hands-on participation, with itineraries that include historic homes such as plantation houses, art galleries, theatres, and museums; cultural events, festivals and fairs; ethnic and regional foods and music; ethnic communities; architectural and archaeological treasures; and national parks. Agro-heritage tourism promotes traditional crops systems, practices and technology; indigenous peoples; plantation history and agricultural landscapes.

A study from the Travel Industry Association of America (TIA) and Smithsonian Magazine (2003) revealed growing interest in travellers' desire to experience cultural, arts, historic and heritage activities. Heritage travellers claimed that they prefer to visit destinations that have some historical significance (38%). A select group (mostly mature tourists) felt that a leisure or vacation trip away from home was not complete without visiting a museum, historic site or landmark (26%) or attending a cultural event or arts performance (17%). Significantly, the research revealed that these travellers spend more money while on vacation compared to the average U.S. tourist, making heritage travellers a potentially lucrative market for Caribbean destinations.
The concept of GeoTourism is gaining significant currency in the Caribbean under its strategies for Sustainable tourism. (In fact, the CEO of National Geographic gave the feature address on GeoTourism at the recent Sustainable Tourism Conference – STC 11 held in Barbados in May 2010.) GeoTourism sustains or enhances the geographical character of a place in terms of its environment, culture, aesthetics, heritage, and the well-being of its residents. Geotourism engages tourists, who have a more authentic experience, and residents, who gain a deeper appreciation for what makes their place unique.

Geotourism is marketable in that it can create financial incentives for good destination stewardship, which in turn generates more interest - and spending - by tourists. It is also promotes competitiveness as it emphasizes, enhances and encourages development of the most unique aspects of a destination, making it a more desirable place.
2.2 Status of Trade Linkages Across Agri-Food – Tourism Value Chain

A simple extrapolation of Caribbean tourism statistics on annual *long-stay visitor arrivals into meals served* demonstrates the huge potential for trade in local agricultural produce, horticultural products and processed foods between the agri-food sector and the Caribbean tourism industry. In 2009, the region received approximately 23 million visitors and 18 million cruise passengers.

In Jamaica for example, available tourism rooms number 6,200,000, with the number of bed nights sold in 2007 averaging 7,300,270. Room nights sold numbered 3,653,383 and guests per night, 20,000 at an average occupancy rate of 60%. The number of meals served in 2007 was 21.9 million.

The level of linkages between farmers and the tourism industry varies across countries in the Caribbean, and there is NO ONE comprehensive regional study on the potential for trade of fresh produce, processed foods and horticultural crops. The Caribbean Hotel and Tourism Association (CHTA) conducted a study in 2005-6 in study in nine CARIFORUM countries. The World Bank conducted a more recent study for the six OECS countries in 2008, and national studies have been done in Jamaica, Bahamas and Trinidad & Tobago within the past five years.

The CHTA study on “*The Caribbean Accommodation Sector as a Consumer of Locally Produced Goods and Services and Contributor to Government Revenues*”, conducted from November 2005 to August 2006 reported that while the linkage between the hotel sector and fresh produce sector was 49%, less than one fifth of the fresh fruit, fish and egg requirement was fulfilled locally. Seventy-seven percent (77%) of fruit was purchased from outside the region (2005), with 90% of eggs sourced extra regionally as well. A similar pattern was seen with seafood, as 72% of fish purchased was sourced from outside the region.

A World Bank study conducted in September 2008 and entitled “*OECS: Increasing Linkages of Tourism with Agriculture, Manufacturing and Services Sectors*”, surveyed 70 hotels, marinas and tourism operators in six OECS countries - Antigua and Barbuda, Dominica, Grenada, St. Christopher-St. Kitts- and Nevis, St. Lucia, and St. Vincent and the Grenadines.
Results of the survey showed that food imports for the tourism sector were estimated at a value of US$366 million in 2007 and represented 20-25% of total agriculture imports. Three items, viz. meat, dairy products and alcoholic beverages, represented the majority of imports. In the case of meat (mainly beef), 89% was imported. It should be noted that only Antigua & Barbuda and St Kitts & Nevis produce significant amounts of beef. In the other islands, beef production is constrained by unsuitable topography, high cost of feed, lack of adequate slaughterhouse facilities, meat processing plants and sanitary control, and lack of skilled butchers to cut meat for hotels.

In the case of dairy products, 81% was imported. Fifty nine percent (59%) of fruits and vegetables are sourced directly from farmers, marketing boards and supermarkets. As much as 70% of fish used in the tourism industry was sourced locally. Hotels indicated that they would be willing to purchase more if sanitary filleting facilities were available.

It was found that, contrary to popular belief, high-end tourism operators tend to buy more local than mass-market operators, as their target market is more interested in a local experience and social responsibility. Nevertheless, only some 30% of hotel food expenditure was found to be local. Also interesting to note was the lack of linkages between souvenirs & handicrafts with the tourism industry, with offerings said to be ‘quite repetitive’ and originating in Asia. In essence ‘there has not been an effective effort to emphasize the uniqueness and distinctiveness of each island country in their souvenir products’.

In the case of the OECS, the following procurement methods were seen in the yachting sub-sector:

_Cruisers_ (up to 100 ft) have highest instance of direct, local purchases. These vessels tend to be operated by owners, mostly retired who spend 2 months+ on board;

_Charters_ – (up to 100 ft.) Rented to tourists, 1 week on board, crew services included. These may consult a retailer at the marina that provides necessary items during their stay over, dine at restaurants at the marina or in nearby towns, or leave purchasing decisions to the marina where they are docked.

_Mega yachts_ – (avg. 200ft.) Rented to groups of 20/30 tourists with full crew service, and on-board chef who will contact a distributor, usually suggested by marina. This is typically high end, with guests requesting fare that they would find in their country of origin. Therefore distributors heavily import from the U.S. and Europe.

Food distribution tends to be controlled by a limited number of players, with the majority of products sourced from overseas. If sourced regionally, they tend to be from Jamaica or
Barbados. In some instances, local governments tie the issuance of import licenses to minimum local purchase requirements. In addition, processed foods tend to be imported while less processed foods tend to be sourced locally.

Under Demand Side Studies conducted in Jamaica in 2008, Deslandes reported that “the local agricultural sector is estimated to control approximately 30% of the J$13 billion or US$177 million in agricultural output consumed by the tourism industry with the other 70% representing imports. The estimation of demand was based on a survey of approximately 4 hotel groups, representing some of the major hotel chains in Jamaica (26.3% of installed room capacity).

The demand side study shows that the hotels consume some 130 commodities. Of these, the Ministry of Agriculture in Jamaica has identified onion, potato, cassava, sweet potato, dasheen, yams, carrots, pepper (hot and sweet), ginger, tomato, and escallion for development. It is very interesting to note that the required area estimated for production to meet the total demand of the hotel Sector, is a mere 200 ha.

**Table 2.2 Jamaica: Hotel Data 2007/2008: Purchase of 66 fresh produce items from local farmers**

<table>
<thead>
<tr>
<th>Hotel Member</th>
<th>Fresh produce Value J$</th>
<th>Percentage of total purchase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Starfish</td>
<td>3,626,512.80</td>
<td>29.0</td>
</tr>
<tr>
<td>Breezes Run-A-Bay</td>
<td>2,326,141.20</td>
<td>18.6</td>
</tr>
<tr>
<td>Grand Lido Negril</td>
<td>1,596,117.60</td>
<td>12.8</td>
</tr>
<tr>
<td>Hedonism III</td>
<td>1,646,670.96</td>
<td>13.2</td>
</tr>
<tr>
<td>Hedonism II</td>
<td>1,028,904.00</td>
<td>8.2</td>
</tr>
<tr>
<td>Grand Lido Braco</td>
<td>1,280,484.00</td>
<td>10.2</td>
</tr>
<tr>
<td>Breezes Mo Bay</td>
<td>981,081.00</td>
<td>7.8</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>12,559,111.56</strong></td>
<td></td>
</tr>
</tbody>
</table>

It is also interesting to note that approximately 50% of the hotel room stock is Spanish owned, and that these properties have strong trading relationships with suppliers external to Jamaica. These hotels include the 4 RIU hotels, the Bahia Principe, Iberia (3 very large properties each with 800 rooms); Hanover (2000 rooms) and Secrets in Mobay.

In general, purchasing decisions for large hotels are made at the corporate level (where economies of scale are crucial) whereas in medium/small hotels, there is greater flexibility and a local owner/manager controls purchasing, where his/her relationship with the community may prove to be a determining factor in the procurement of local goods.
In Jamaica, studies conducted in 2008 showed that the supply of produce to the hotel industry is primarily controlled by an *ad hoc* potpourri of middlemen (wholesalers, retailer, brokers, farming groups - both large and small), who are able to supply the industry with both local and imported products. Individual farmers and farming groups have made some inroads but these attempts have not been sustainable. Hotels have avoided such arrangements because of the perceived difficulties of dealing with numerous individual farmers and inconsistencies of both delivery and quality. The emergence of farmer groups and farmer cooperatives through the work of the Ministry of Agriculture and RADA, has opened up the possibilities of direct linkages between farmers and hotels.

Hotels are generally influenced by supply and demand in the marketplace. In order to minimize short term price fluctuations, hotels may enter into contractual arrangements with distributors and farmers to supply produce at agreed prices for 3-6 month periods. An example of a typical contract is provided in the Appendix. This approach is problematic, however during extended dry periods, and hurricane seasons. On the other hand, some hotels prefer to purchase on a weekly basis, benefitting from gluts, but also suffering during shortages.

There is a more recent (and worrisome) trend that hotels are moving towards a model of procurement BEYOND cooperatives and large distributors, applying supply chain management techniques to reduce overall cost of inputs and increase levels of profitability. The change in purchasing patterns is being driven by the need to control costs in the face of increasing competition. This has the potential for significant negative impacts on farmers’ revenues, however, as recently seen in the case of cantaloupe imports by hotels, where the price to local farmers dropped by 50%. Price is influenced by planting cycles (generally with the rainfall cycle), government action (ranging of import licences or imposition of “closed season” for import), and by climatic conditions.

Supply Side Analysis highlighted the many problems along the value chain which continue to frustrate the establishment of sustainable trading partnerships between farmers and hotels. These include:

- Inadequate means of transporting inputs and outputs because of deplorable road conditions
- Need for tractor service for land clearing and tillage
- Soil management problems (soil fertility, drainage, soil erosion)
- Lack of protected seed nursery to allow for scheduled planting of vegetable seeds
- Need to facilitate continuous establishment of selected vegetables using greenhouse facilities
- Lack of irrigation pump and distribution systems (essential for production during the dry season)
- Inadequate financial assistance to address problems of land tenure
- Significant pre- and post harvest losses of up to 50% of marketable yield may be lost prior to utilization by the final consumer. Therefore if the yield is reduced by 50% to cover losses in the field, harvest and post harvest management along the value chain then the estimated area of 200ha would have to be doubled.
- Lack of business organization. Groups must be registered to access loans and grants
- Inadequate training and availability of tools for business management record keeping and business operations & group dynamics
- Inadequate knowledge of good agricultural practices (GAPs) from land clearing through post harvest handling

In the case of the Bahamas, the hotel and restaurant sectors are heavily reliant on imports due to a perceived lack of capacity of agriculture to serve the sectors. In response to this situation, the Ministry of Agriculture undertook market research to identify commodities with the greatest penetration potential into the tourism sector. In the market study undertaken in 2008, a cross-section of buyers, (including wholesalers, retailers, hotels (large, medium and small), restaurants, and fruit vendors) was interviewed to determine their levels of import of agricultural produce and the volume of business attributable to visitors. The results are shown below:

<table>
<thead>
<tr>
<th>Institutions</th>
<th>Import of Agricultural Produce</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wholesaler</td>
<td>76.67%</td>
</tr>
<tr>
<td>Retailer</td>
<td>78.33%</td>
</tr>
<tr>
<td>Large Hotel</td>
<td>78.33%</td>
</tr>
<tr>
<td>Medium Hotel</td>
<td>85%</td>
</tr>
<tr>
<td>Small Hotel</td>
<td>55%</td>
</tr>
<tr>
<td>Restaurants</td>
<td>88.33%</td>
</tr>
<tr>
<td>Fast Foods</td>
<td>85%</td>
</tr>
<tr>
<td>Takeaway</td>
<td>91.33%</td>
</tr>
<tr>
<td>Fruit Vendors</td>
<td>70%</td>
</tr>
</tbody>
</table>

Large, medium and small hotels commanded the highest percentage of business from visitors (80%, 60% and 53% respectively), while restaurants attributed 43.3% of their business to visitors.

Despite inconsistent freshness, quality and availability 11.1% of the businesses surveyed felt that standards of local produce were good and that quality was improving. Buyers also felt that the quality of local commodities (tomato, cabbage, sweet pepper, onion, cucumber, pumpkin, lemon, lime) met their standards, and indicated that they prefer and would purchase all local fresh produce because of superior taste and flavour.
The reasons cited for not purchasing local produce included:

- Inconsistent availability of local produce (51.85%)
- Lack of networking among farmers (25.9%)
- Sellers NOT Franchise-Approved (11.1%)
- Poor quality, price and quantity (14.8%)
- Import Restrictions
- Inadequacies of The Produce Exchange
- Seasonality (crops not staggered)
- Food Safety & Regulations

The following 15 crops were identified as having the best penetration potential for the tourism sector in the Bahamas:

- Onion
- Irish Potato
- Lettuce
- Tomato
- Carrot
- Cabbage
- Sweet Pepper
- Hot Pepper
- Pigeon Peas
- Thyme
- Celery
- Lemon
- Orange
- Plantain
- Grapefruit

In the case of Trinidad and Tobago, although there is a relatively active trade in the supply of locally produced foods to the tourism sector, there is room for improvement in terms of consistency, quality of supplies, pricing, scheduling, marketing and communication between the major players. In 2004, NAMDEVCO initiated contract farming relationships and intends to encourage closer relationships between the agricultural and tourism sectors through marketing strategies and initiating communication. They also conducted a survey of the hotel and restaurant sector in order to determine:

1. The consumption pattern of selected products and commodities
2. The pattern and make forecasts of trends in purchasing
3. Whether the businesses would purchase crops from farms certified by NAMDEVCO as having GAPs (Good Agricultural Practices)

Data was collected for consumption trends and values for the following produce:

- Dasheen
- Cassava
- Ginger
- Sweet Potatoes
- Cabbages
- Cauliflower
- Christophene
- Cucumber
- Lettuce
- Pumpkin
- Sweet Pepper
- Tomatoes
- Banana
The survey indicated that:

- 85.71% of hotels which responded were willing to purchase from farmers’ groups
- 64.28% of hotels were aware of NAMDEVCO’s farm certification programme
- 71.42% were willing to send personnel to NAMDEVCO’s training programmes
- 57% are willing to have in-store promotions with NAMDEVCO

2.2.1 Linkages to Food Processing

There are also linkages between farmers and restaurants (not associated with hotels) and linkages between several of the region’s top agro-processing companies and the tourism and foodservice sectors. The processed foods which are traded include:

- Pepper sauces, pepper jellies, chutneys, dried pepper
- Jerk sauces & marinades, pepper wines
- Coconut oil (incl. virgin)
- rum cakes and baked goods
- crackers and biscuits
- fruit juices and concentrates
- Jams, jellies, fruit butters and cheeses
- indigenous confectionery
- canned ackee, calaloo, breadfruit, peas & beans
- cassava pancake/waffle mix
- cassava bread
- bottled coconut water and bottled spring water
- coffee and herbal teas
- sweeteners (sugar, honey)
- seamoss beverages
- chocolate (incl. organic)
- rum products and liquers
- bottled seasonings and casareep
- dairy products (milk, cheeses, yoghurt)
- frozen and smoked fish
- processed poultry & meats
- fresh and liquid pasteurized eggs

Neither the potential demand by the tourism industry for indigenous processed foods, nor the actual quantities of products traded have been determined with any accuracy at national or regional levels. Caribbean Export is currently funding a study on strengthening the Caribbean
Specialty Food Sector, with special emphasis on linkages to tourism sector at national and regional levels.

On the supply side, the development of the Caribbean agribusiness sub-sector is challenged by issues such as:

- Weak private sector organisations in the non-traditional sectors.
- Absence of performance incentives in the public sector
- The inadequacy of technological advances in the primary production and processing sectors
- Inadequate strategies of several public sector support agencies, including the Ministries of Agriculture.
- A culture of individualism
- Inadequacies of agricultural health and food safety systems
- An inability to effectively utilise available development funding

At a regional level, trade of processed foods into the hotel and tourism sectors is constrained by the lack of adequate transportation and market information systems, restrictive trade policies and non-tariff barriers, and by procurement systems which are characterized by inter-locking alliances between hotels and restaurants and their food brokers.

2.2.2 Linkages to Manufacture of Non-Food Indigenous Products

2.2.2.1 Craft

A portion of tourists' spend is always dedicated to the purchase of locally produced products that are typical for the country, population or landscape, as a remembrance of the visit, a token of moments shared with loved ones, or as an authentic gift to friends and family back home. The potential demand for authentic local craft as souvenirs can be estimated from tourism statistics of visitor arrivals (40 million visitors per annum – long stay and cruise arrivals). At a conservative estimate of US$5 per gift for 10% of total visitors, potential revenues could amount to US$20 million per annum.
Authenticity is guaranteed when crafts are derived from local agricultural materials such as animal skins, leaves, pods, seeds, roots and grasses and designed and with art and materials depicting local themes.

### 2.2.2.2 Natural Products

Natural products used are indicative of an herbal base which has a strong competitive edge in the Caribbean. The manufacture of nutriceuticals, essential oils, massage oils and spa products is directly linked to the agricultural production of crops such as crabwood, coconut, ginger, nutmeg, hot pepper, aloe, cerasee, organic sugar cane, cinnamon, and noni.

The key to achieving a high level of competitiveness, is not simply to engage in commodity priced and unbranded participation in the health and wellness market, but to establish a unique Caribbean brand on the basis of the region’s immense biodiversity and traditional knowledge of healing. A case in point is ginger. The margin on Caribbean branded high quality ginger could be significantly higher than commodity ginger products. Food companies in northern markets have recognized the attractiveness of the “Jamaican Ginger” brand and have expropriated its use in their marketing. Unfortunately, this strong Caribbean-based brand has been allowed to “lapse”. While Jamaica was formerly one of the top three producers in the world with 2 million kilograms of “the finest ginger in the world” in 1953, by 1995 Jamaica was producing less than 0.4 million kilos annually. It is noteworthy that ginger supplements are ranked 9th among the “Top 10 Natural Products”.

![Images of ginger, leaves, and pepper](image1.jpg)
The Caribbean is well known for the production of a diverse range of high quality indigenous crafts which use agricultural materials. Much of this development has been supported over the past two decades by the Caribbean Development Bank (CDB), and the Caribbean Export (CE) Development Agency which hosts an annual Caribbean Gift and Craft Show. This year CE will launch new export-ready well-designed products from 40 regional handicraft suppliers as a result of a major ongoing design initiative known as OnSite Caribbean, which aims to increase the competitiveness of micro, small and medium-sized handicraft producers. In conjunction with this, a redesigned Caribbean gift and craft show to showcase these new product collections and to promote the show to buyers, retailers and international visitors, will be launched in the Dominican Republic in September.
2.3 Status of Existing Initiatives in Farmer-Hotel Trade Linkages and Agro- and Rural-Based Sites and Attractions

2.3.1 Farmer-Hotel Partnerships

There are several success stories of projects and ongoing businesses which are based on trade of fresh produce to hotels, restaurants and the hospitality sector. The majority are listed in Box 2.1 below.

Box 2.1
Caribbean Best Practices and Success Stories in Farmer-Hotel Partnerships
• Bahamas – Goodfellows Farm
• Jamaica – Sandals Montego Bay and Maffota Farmers; SuperClubs, Breezes
• Nevis - Nevis Growers Assn. & Four Seasons Resort (FSR)
• OECS – OXFAM Market Access Initiative
• St. Lucia - Santoy, Black Bay and Maffota Farmers (Sandals Chain - Jamaica & St. Lucia); Barbonneau Farmers St. Lucia and Almond Chain (Barbados & St. Lucia)
• Trinidad & Tobago - Mt. St. George Farmers, UK Travel Foundation & Hilton Tobago, Tobago Honeybee Project, School Gardens Project, School Aquaculture Project
• Suriname – Commewijne lettuce project

2.3.1.1 Goodfellows Farm, Bahamas

Under the experienced management of Ian Goodfellow, five acres of a planned 60-acre agricultural centre at Mount Pleasant are now producing a wide variety of pesticide-free salad
greens, lettuces, swiss chards, spinach, arugula, herbs and vegetables such as eggplants, cucumbers, snow peas and sugar snaps. The relatively small but efficient operation is the only one of its kind in the country. It specializes in growing high-end greens and uses hydroponics and soil-based farming methods together with natural fertilizers and bug repellents to grow the crops. A variety of innovative seedling pairings at planting, results in crops of ready-mixed salad. One 11-seed mix has been named the 'millionaire's mix,' due to the demand from the higher-end restaurant market.

The farm opened for business in September 2003 after 8 months of ground and crop preparation. Today, it services 17 restaurants in and around Nassau and the customer base is growing. By concentrating their efforts on producing fragile salad greens that do not travel well for import purposes, Goodfellow Farms has captured within a short space of time a lucrative market, hungry for fresh salad greens reliably delivered daily. The salad greens which consist of four different varieties of lettuce, plus arugula and spinach also include a juicy, soft-seed cucumber. Crops are cut to order from the fields each morning before 10:00 a.m. for same day delivery. They are washed and spun on site, kept chilled in cold rooms and packed into transparent cases for delivery to such customers as The Old Fort Bay Club, Lyford Cay, The Ocean Club, Atlantis, the Gourmet Market, Villaggio and Graycliff. Deliveries are made twice a week to Harbour Island to The Landing, Rock House, Sip Sip, Ocean View, Romora Bay Club and Dunmore Deli.

The quick and successful start gives credence to the expansion plans already underway through further ground preparation and additional man-power. The plans call for food production on 60 acres over an 8-year period. Goodfellow Farms is also a place for families to visit and enjoy and to shop for farm fresh produce. The shop at the Farms sells home-made jellies, jams, syrups, marmalades, conserves, relishes and herb-infused vinaigrettes and dressings. About a thousand gallons a year are made by Ian's wife, Karin, and her culinary assistants on Eleuthera. The most popular jam is Guava and the most favoured marmalade is from Eleuthera pineapple and large grapefruits called Pommelo. Other top sellers include hot pepper jellies and an English-recipe Mango Chutney infused with Ginger. Ian Goodfellow is quick to point out that the Goodfellow System of farming is simple and easily implemented by those with an interest in agriculture as a living. He is actively seeking youngsters to train through an agricultural apprenticeship scheme that he helped implement at the College of The Bahamas as a part of their existing agricultural programme headed by Dr Linda Davis.
2.3.1.2 The Nevis Model

This is a 15-year success story based on a market-led approach between the Four Seasons Resort (FSR), the Ministry of Agriculture and the Nevis Growers Association. The project involved joint activities of producers, research and extension in a closely monitored production and marketing system. The essential elements of the project were:

- A producer group, the Nevis Growers Association (NGA) was formed with 12 members
- A Marketing Division was established within the Department of Agriculture to facilitate the marketing of agricultural products and also function as a clearing-house for the NGA
- The Department of Agriculture provided extension support for production and seedlings
- The NGA coordinated production targets and cropping schedules
- The Marketing Division also coordinated bulk purchasing of inputs and credit to farmers
- The Department of Agriculture assigned two (2) Extension Officers to collect and transport produce to the Marketing Division
- The Marketing Division washed, graded and labeled produce. Storage of produce also done in the chill room at the Marketing Division
- The FSR order was filled and delivered every Tuesday and Friday by the Marketing Division
- Staff at the Purchasing Department of the FSR inspected and weighed the produce on arrival
- The hotel paid for produce every fortnight. The transaction was facilitated through a chequing account at a commercial bank in the name of the Nevis Growers Association
- The Marketing Division made a 5% deduction from the monies received from the sale of the farmer’s produce as an administrative fee.
- The Purchasing Manager and the Executive Chef from the FSR met with the producers at the start of the production season and discussed the expectations of the hotel for the new production season and provided reassurance of their obligation to the producers.
- Whenever there was a new Executive Chef at the FSR, he would be invited to meet and discuss with the producers the arrangement established with the hotel and any new strategies he would like to use
- The crop forecasting system developed by the Extension Division provided information on the availability of local produce and guided the decisions taken regarding import quotas
- There is mutual understanding between the Department of Agriculture and the FSR regarding the availability of produce. A two (2) week lead time was provided to the hotel to make alternative arrangements for sourcing produce unavailable from the producers.
2.3.1.3 The OXFAM Market Access Initiative

The aim of the project was to create a model for ensuring that agro-tourism linkages were developed between the private sector, small-scale farmers and Governments. The project directly benefitted approximately 800 small-scale farmers in St. Lucia engaged in vegetable and fruit production, each from a rural-based household of about 5 persons. Regional small producers and the tourism sector also benefitted indirectly from trade policy and practice changes as a result of advocacy and lobby efforts. The implementation of the project was made possible through the participation of CPDC, WINFA, ECTAD, and the small-scale producers.

The programme strategies included:

• Consolidation of the experiences of small-scale farmers to create sustainable livelihoods, linking innovative practices with strengthened capabilities to participate in local and regional markets.
• Linking and scale-up of local experiences of small-scale farming to promote sound policies at different levels.
• Learning and sharing of best practices to increase agro-tourism linkages.
• Research into the impact of tourism on agriculture, especially as it affects small-scale farmers.

The expected benefits were:

• Improvement of trade, production and productivity capacities of 500 small rural producers;
• Development of a model for ensuring that agro-tourism linkages are developed between the private sector, small-scale farmers and Governments;
• Creation of public policy that support agro-tourism linkages;
• Improved access to the tourism market for Caribbean small-scale farmers.
• Ensuring that the ‘services’ required to support small-scale farmers to diversify production, worked effectively in St. Lucia.
• Illustration of how the Caribbean Single market can support small-scale Caribbean farmers.
• Demonstration of the benefits to the Tourism industry for Hotels to purchase local agro produce
• Demonstration of best practices on joint private sector projects for replication by northern Tour operators and Hotel groups
2.3.2 Culinary Events

Historically, the Caribbean region has been at the crossroads of major world’s cultures. This is reflected in the multi-ethnic cuisine which represents a tremendous strength with respect to the development of Culinary Tourism. From Food Festivals in Jamaica and Trinidad, to a rich restaurant culture in Barbados, the Caribbean is set to lead in this area.

### Box 2.2

**Caribbean Best Practices and Success Stories in Food Festivals**

- Antigua – Mango Festival
- Bahamas – Pineapple festival, Seafood and Wine (*NEW*)
- Barbados – Taste of Barbados, Gourmet Evenings, NIFCA, Oistins Fish Garden, AgroFest Plantation Breakfast
- Commonwealth of Dominica – Creole Festival
- Grenada – Gouyave fish festival
- Guyana – Rockstone Fish Festival
- Jamaica - Jerk, Yam, Bammie, Breadfruit, Bussu, Fish and 10 other festivals
- St. Kitts & Nevis – NICHE Slow Food Festival
- St. Lucia – Anse La Raye, Gros Islet, Rum and Food, Plas Kassav
- Suriname – Maroon restaurant
- Montserrat – Breadfruit festival
- Belize – Garifuna, Cashew festival, Cocoa Festival (Toledo District), Hopkins Lobster Festival, Hopkins Picanha festival
- Guadeloupe - Women who cook

Processors in the Caribbean are also developing visitor centres which take patrons on an educational tour and offer a unique culinary experience. Such companies include Walkerswood in Jamaica, Baron Foods in St. Lucia, and rum distilleries in Barbados, Jamaica and the Eastern Caribbean.
2.3.3 Farm-Stay and Community-Based Initiatives

The major nature and agricultural-based tourism success stories in the Caribbean are shown in Box 2.3 below. They range from family fun and stays with families on farms, to visits into rural areas where tourists pay for experiences such as cooking Carib cuisine in Dominica, birding in Trinidad and Belize, and tours of botanical gardens and forests.

Box 2.3
Caribbean Best Practices / Success Stories in Nature and Farm-Based Tourism

- Bahamas – Goodfellow’s Farm
- Barbados – Barbados Blackbelly Sheep tour, Tilapia farm, Nature’s Produce, Safari Tours
- Commonwealth of Dominica – JTAS Tours, 3 Rivers Eco Lodge, Giraudel Flower Farms, Rainforest Mushrooms
- Grenada – Belmont Estate
- Guyana – Shanklands, Iwokrama, Tri-Lakes Capoey Project
- Haiti – Fondacion Seguin (sustainable bamboo project)
- Jamaica – Pineapple and coffee tours, Greencastle Farm (organic)
- St. Kitts & Nevis – Nevis Botanical Gardens
- St. Lucia – Fond Doux, Mamiku
- Trinidad & Tobago – La Vega, Asa Wright, Adventure Farm and Nature Reserve – Tobago, Citrus and Rice Farm tours, UK Travel Foundation, Tobago, Brasso Seco

Other Caribbean:
- Belize – Sarteneja Fishing Village Homestay, Hopkins
- Guadeloupe – Crab farm
- Aruba – Aloe factory
2.3.4 Health & Wellness Initiatives

Unique opportunities exist in the Caribbean that have not been fully developed. In addition to herbal remedies and the potential for pharmaceutical bio-prospecting, the role of water in alternative healing in the Caribbean could be especially powerful: “Black Water” in Guyana, mineral springs in Jamaica, the healing and salt ponds of the Bahamas, the special uses of seaweed, and the composition of Caribbean sea water for use in thallasotherapy are all under explored strengths of a potentially very powerful market differentiation. Bottled water (including coconut water) exports, if well-positioned and marketed could open up an additional health and wellness sub-segment of the health and wellness sector.

While larger, globally branded wellness services, especially in the Caribbean spa industry, have experienced considerable growth and expansion, the nascent health and wellness market in the English-speaking Caribbean has not yet reached its potential as a sub-segment of the health and wellness sector. Holistic and alternative treatments already offered by small and medium sized businesses in the Caribbean have the potential for strong growth if they could improve their market visibility. Skilled and creative entrepreneurs in the Caribbean have built viable health and wellness businesses, but a lack of internationally recognized branding, well-funded marketing and sales capability, and inadequate access to capital have limited their ability to expand and add new employees.

This is a key area for a strong role for multilateral agencies. By opening multilateral investment to Caribbean entrepreneurs in this segment, supply could be better aligned with demand. This goal could be accomplished through the creation of a micro-loan program for small businesses with well-founded business plans. In addition, by funding a project to support the efforts of marketing co-operatives in the Caribbean, fee-based alternative health and wellness membership organizations could improve the international visibility of small and medium sized operators. This effort could be further strengthened by a standards and certification study of existing alternative health and wellness services and companies in the Caribbean. Key assistance could also be provided by the multilateral agencies in funding a study to research and publish an “Encyclopedia of Traditional Caribbean Herbal Remedies” and a market study of such herbs which could serve as the platform for the expansion of organic herbal farming in the Caribbean. There are large numbers of Caribbean-born populations residing in the U.S., Canada and the U.K.. In the U.S. alone, over 16 million people, or 9.5 % of the foreign-born population in the United States, were from the Caribbean in the year 2000. Four of the five large English-speaking countries of the Caribbean have significant numbers of residents living in the United States.
Several Caribbean countries are taking advantage of this emerging market in Health and Wellness. Health or medical tourism offers the opportunity for long stay visitors taking advantage of the wellness opportunities in post-operative and recuperative care presented by the availability of healthy, nutritious food, relaxing rural landscapes and healing services. The major initiatives are presented in Box 2.4 below.

<table>
<thead>
<tr>
<th>Box 2.4 Caribbean Best Practices and Success Stories in Health and Wellness Tourism</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bahamas – seamoss spa treatments, Nature Reserve Grand Bahama, Abaco Neem</td>
</tr>
<tr>
<td>Barbados – Soothing Touch Da Spa, Suga Suga, Light Body Holistic Clinic, EarthMother Botanicals, Sandy Lane Spa, Maas Clinic, Vegetarian restaurants</td>
</tr>
<tr>
<td>Commonwealth of Dominica – Coal Pot Creations</td>
</tr>
<tr>
<td>Grenada – Natmed</td>
</tr>
<tr>
<td>Haiti – Belzub</td>
</tr>
<tr>
<td>Jamaica - Wellfest, Glenleigh Noni, BlueMountain Aromatics, Starfish Oils</td>
</tr>
<tr>
<td>St. Kitts &amp; Nevis – Michael Herbert “Bush” Doctor</td>
</tr>
<tr>
<td>St. Lucia – Spas, herbal products, organic cocoa and chocolate experiences</td>
</tr>
<tr>
<td>Trinidad &amp; Tobago – Kariwak Village</td>
</tr>
</tbody>
</table>

**Other Caribbean:**

Anguilla – Cuisinart Resort and Spa

Jamaica has instituted ‘Wellfest’ which showcases the holistic lifestyle community and industry in Jamaica and promotes activities that enhance the quality of life and inspire public interest in total well-being – physical, social, spiritual, emotional, mental and financial. Caribbean spa resorts, most notably in St. Lucia, Bahamas, Jamaica and Barbados, are differentiating their offerings by blending traditional indigenous therapies such as sugar cane scrubs and warm sea water Jacuzzis with treatments from the Far East and Europe. Holistic cuisine, including the use of indigenous foods, as well as organic vegetables, and dairy alternatives is an essential element of Health and Wellness Tourism.
2.3.5 Agro-Heritage Sites and Attractions

There is significant investment potential in the development of the built patrimony of old sugar, coffee, and cocoa estates. The development of such sites attracts significant investment into the rural economy, and also creates a series of industries indigenous to the Caribbean which, placed in creative plantation ecology, can become an exciting tourist adventure with a distinctive appeal to varied tastes throughout the year.

<table>
<thead>
<tr>
<th>Box 2.5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caribbean Best Practices and Success Stories in Agri-Heritage Tourism</td>
</tr>
<tr>
<td>Antigua &amp; Barbuda – Sugar plantation heritage</td>
</tr>
<tr>
<td>Bahamas – Lucayan Indian (indigenous)</td>
</tr>
<tr>
<td>Barbados – Sugar plantation sites eg. Codrington College, Morgan Lewis Windmill and St. Nicholas Abbey</td>
</tr>
<tr>
<td>Commonwealth of Dominica – Banana plantation</td>
</tr>
<tr>
<td>Dominican Republic – Ruta del Cafe</td>
</tr>
<tr>
<td>Grenada – Belmont Cocoa Estate</td>
</tr>
<tr>
<td>Guyana – Sugar and rice plantation sites, indigenous people</td>
</tr>
<tr>
<td>Haiti – Coffee plantation sites</td>
</tr>
<tr>
<td>Jamaica - Sugar, coffee and cocoa plantation sites</td>
</tr>
<tr>
<td>St. Kitts &amp; Nevis – Sugar Train</td>
</tr>
<tr>
<td>St. Lucia – Banana plantation sites, Hotel du Chocolat, Plas Kassav</td>
</tr>
<tr>
<td>St. Vincent &amp; the Grenadines – Indigenous people</td>
</tr>
<tr>
<td>Suriname – Saramaccan and indigenous people</td>
</tr>
<tr>
<td>Trinidad &amp; Tobago – Cocoa and coffee heritage, Duane Dove</td>
</tr>
</tbody>
</table>

Other Caribbean:
Guadeloupe – Maison du Bois, Pays de La Canne, Verte Vallee

2.3.5.1 Pays de La Canne, Guadeloupe

Sugar Museums such as Pays de la Canne transform the tradition of the sugar plantation, with all of its activities, into an educational, cultural and touristic adventure, fascinating to both citizens and visitors. The site features a replica of the old sugar factory, the only one
remaining in Guadeloupe, and a still museum with animated demonstrations of the process of sugar extraction. Other attractions on the site include:

- A scenic tour by train with a stop at a station with sugar-based refreshments
- A sugar packaging factory producing collectors’ range of tins and boxes with packaged sugar, featuring local art and flora of Guadeloupe
- A guided tour of a Sugar Laboratory
- A Memorial wall of workers
- A Pathway with 32 varieties of sugar cane
- A Pathway with animations and papier-mâché insects and pests of sugar cane
- A Themed Restaurant with local food
- A Gift shop with art and craft from community

The project was developed by SEMAG, a parastatal organization with funding support from INTERREG IIIB. The entrance fee to the museum is 9 Euro (adults) and 4 Euro (children). In 2007, 100,000 visitors, primarily from the cruise sector, were expected to visit.

2.3.5.2 Buff Bay Valley Heritage Trail

This project was implemented by the IICA Jamaica office through funding from the European Union-Government of Jamaica Rural Diversification Programme. The project aimed to provide new income earning opportunities for residents in the target communities in Buff Bay Valley by developing tourist attractions in the Valley and establishing marketing linkages between the farmers and the hotel sector. Activities involved:

- Assessing the places of interest, infrastructure, organizational strengths of local Community Based Organisations (CBOs), and attitudes toward tourism in the Valley
- Selecting places of interest that could be packaged as tour attractions based on the above assessment. (The selected attractions were based on the natural environment, historical and cultural background and farming livelihoods of the communities)
• Conducting heritage studies of the Valley to include the historical background and natural heritage (ecology) of the designated area
• Constructing and enhancing facilities for the attractions/tours, such as tourist halt, agro-demonstration facilities and erecting signage
• Undertaking training of community members to improve their capacity to manage the activities, for e.g. strategic planning, business and financial management, hospitality management and tour guiding
• Evaluating and training selected groups of cottage agro-processors and craft-makers to improve the standards of their products such that Valley souvenirs are available to visitors
• Working alongside farmers to forge a marketing relationship with the hotels. This included collecting data on the agricultural status of the Valley and the demands of the hotel sector, strengthening farmer organizations, providing assistance with crop selection and training with regard to good agricultural practices
• Establishment of a Corridor Management Council, comprising representatives from the Valley CBOs.

2.4 Socio-Economic Impact of Agrotourism

While there have been several initiatives in agrotourism throughout the region, there is limited documentation of the case studies and assessment of the socio economic impact on stakeholder communities. The following examples nevertheless, show significant positive impacts in terms of increased income and training for producers, significant savings for hoteliers and improved corporate profile and improved livelihoods for rural community stakeholders.

2.4.1 Farmer-Hotel Partnerships

2.4.1.1 The Sandals Resort Farmers Programme, Jamaica

The Sandals Resort Farmers Program which started in 1996 has increased in its number of participants and profits over the years. It began as the RADA/Farmers/Hotel Programme with the involvement of a group of ten farmers in St. Ann/Clarendon, producing traditional and exotic vegetables of high quality specifically for the Sandals chain of hotels. These farmers were trained under an FAO/GOJ Postharvest Management project. The project started on a crop-lien basis for the first 3 years with the hotel chain providing planting material to farming groups and the farmers making the necessary repayment at the end of the cropping season.
While this relationship is still ongoing, it is not as strong as it was in the past. Issues emerged with the payment arrangements and the delivery and value of the produce suffered. Farmers were sometimes paid 90 days after delivery which reduced their ability to sustain production on a very weak resource base. In addition, many of the groups failed due to issues related to weak management, lack of accountability and transparency in their operations. A major challenge was the inability of these groups to manage conflict. This effort is now a part of The Sandals Foundation, launched in March 2009, which focuses on philanthropic activities, including the support of local farmers.

2.4.1.2 The Sandals Resort Farmers Programme, St. Lucia

The programme started in November 2002 with 50 farmers and two farmers’ organizations. Training was provided for Purchasing Clerks and Receivers by CARDI and the Ministry of Agriculture, in areas such as post-harvest handling of fruits, vegetables and root crops, and food safety.

The impact is clearly shown in 2.3 which shows a savings for Sandals SLU of over 1million/yr in imports by purchasing local produce from farmers.

Table 2.3 Comparison of Imported vs. Fresh Produce Purchases by Sandals St. Lucia (2004)

<table>
<thead>
<tr>
<th>PRODUCE</th>
<th>Demand/lb</th>
<th>Value_EC($) Per wk.</th>
<th>Value/Yr. Local</th>
<th>Value/Yr. Imported</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Wk</td>
<td>Year</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Fruits:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Honey dew</td>
<td>2,200</td>
<td>114,400</td>
<td>4,400</td>
<td>228,800</td>
</tr>
<tr>
<td>Cantaloupe</td>
<td>2,200</td>
<td>114,400</td>
<td>4,400</td>
<td>228,800</td>
</tr>
<tr>
<td>Watermelons</td>
<td>2,400</td>
<td>124,800</td>
<td>4,200</td>
<td>218,400</td>
</tr>
<tr>
<td>Pineapple</td>
<td>3,000</td>
<td>156,000</td>
<td>9,000</td>
<td>468,000</td>
</tr>
<tr>
<td><strong>Vegetables:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tomatoes</td>
<td>2,000</td>
<td>104,000</td>
<td>5,500</td>
<td>286,000</td>
</tr>
<tr>
<td>Cherry Tomatoes</td>
<td>80</td>
<td>4,160</td>
<td>400</td>
<td>20,800</td>
</tr>
<tr>
<td>Green Bell Peppers</td>
<td>450</td>
<td>23,400</td>
<td>1,125</td>
<td>58,500</td>
</tr>
<tr>
<td>Yellow Bell Peppers</td>
<td>500</td>
<td>26,000</td>
<td>3,500</td>
<td>182,000</td>
</tr>
<tr>
<td>Squash Zucchini</td>
<td>550</td>
<td>28,600</td>
<td>1,100</td>
<td>57,200</td>
</tr>
<tr>
<td>Cabbage</td>
<td>550</td>
<td>28,600</td>
<td>880</td>
<td>45,760</td>
</tr>
<tr>
<td>Romaine Lettuce</td>
<td>1,800</td>
<td>93,600</td>
<td>6,300</td>
<td>327,600</td>
</tr>
<tr>
<td>Cauliflower</td>
<td>550</td>
<td>28,600</td>
<td>2,200</td>
<td>100,100</td>
</tr>
<tr>
<td>Broccoli</td>
<td>500</td>
<td>26,000</td>
<td>2,025</td>
<td>78,000</td>
</tr>
<tr>
<td>Red cabbage</td>
<td>200</td>
<td>2,500</td>
<td>300</td>
<td>3,600</td>
</tr>
<tr>
<td><strong>Condiments/Herbs:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parsley</td>
<td>80</td>
<td>4,160</td>
<td>480</td>
<td>24,960</td>
</tr>
<tr>
<td>Coriander/Cilantro</td>
<td>10[1]</td>
<td>520</td>
<td>70</td>
<td>3,640</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td></td>
<td></td>
<td>45,580</td>
</tr>
</tbody>
</table>
2.4.1.3 *The Nevis Model*

The economic impact of trade between the Four Seasons Resort and Nevis Growers Association is shown in Figure 2.5 below. Sales increased from approximately EC$280,000 to a maximum of EC$600,000 in 2002 and leveled off at EC$300,000 in 2003 and 2004.

![Crop Sale to FSR 2000 - 2004](image)

*Figure 2.5* Crop sales to Four Seasons Resort

2.4.1.4 *UK Travel Foundation Tobago – Adopt a Farmer Project*

The UK Travel Foundation in Tobago began an *Adopt-a-Farmer* project in 2004 to encourage the supply of fresh produce to local hotels. Nine (9) primary schools are also involved in growing herbs to supply 2 major hotels. The success of the project four years later is shown in the table below, which shows farmers achieving sales of TT$1.8 million.

Other benefits to farmers included:

- Improved pricing
- Increased volume of vegetables sold
- New clients identified
- Increased income from sale
- Improvement in production practices: fertilizer management, record keeping, harvesting methods and packaging
- Capacity building – trained farmers
- More time available for farming

2.4 Increase in Trade by Farmers to Hotels in Tobago

<table>
<thead>
<tr>
<th>Period</th>
<th>No. of Farmers</th>
<th>No. of Hotels</th>
<th>Total Sales TT$</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004/2005</td>
<td>8</td>
<td>1</td>
<td>$80,000</td>
<td>Pilot</td>
</tr>
<tr>
<td>2006</td>
<td>12</td>
<td>10</td>
<td>$330,000</td>
<td>28 direct suppliers</td>
</tr>
<tr>
<td>2007</td>
<td>5</td>
<td>8</td>
<td>$720,000</td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>6</td>
<td>7</td>
<td>$M1.2</td>
<td>↓volume ↑prices</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3 restaurants</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Benefits to the hoteliers include:
- Opportunity for branding/ marketing advantage:
- Reduced environmental impact from CO2 emissions
- Authentic local experience
- Corporate responsibility
- Supporting local farming initiatives
- Increased income from repeat visits and promotion

2.4.1.5 OXFAM Market Access Initiative

A specific example of a farmer’s co-op affiliated with the OXFAM project is the Black Bay Farmers’ Cooperative which comprises 23 farmers who work 60 acres of land. They have reported a tripling of their profits since receiving Oxfam’s assistance with training, inputs and equipment. The Belle Vue Co-op is another organization that has created an agro-tourism linkage – in 2006 they started St. Lucia Organics as a tourism-focused endeavour which was aimed at supplying the high grade produce required by the industry.
The benefits are many and efficiency is high – they produce 10,000 cases of organic products a year, have their own washing and packing facilities and produce biodiesel from discarded oil from restaurants, with biweekly deliveries, 52 weeks a year. In addition, the organization can sell at a price that far exceeds the norm for the local market, but is also less than the import price – and without the waiting period (sometimes restaurants and hotels wait for 10 days to receive imported produce).

### 2.4.2 Culinary Tourism

#### 2.4.2.1 Anse La Raye, St. Lucia

This project started in 2000, with the objective of linking the fishing industry to tourism, using a sustainable livelihoods approach to benefit the local community. The average visitor spend recorded was US$73.

An analysis of the impact on the community showed the following:

- 78% of vendors rated activity as important to the people of Anse La Raye
- 83% of vendors dependent on Seafood Friday activity for primary income
- 50% have sourced loans from microfinance agencies
- 25% have expanded into other businesses
- Good credit ratings were received by micro-financers
- **94% experienced increase in income**
2.4.2.2  Taste T&T

Taste T&T not only generated revenue with gate receipts, but overwhelmingly, 94% of survey participants said they enjoyed the Culinary Festival, and 95% of said they would return to the Culinary Festival the next year, and would recommend the Culinary Festival to others next year.

2.4.3  Rural and Heritage Tourism

Diversification of the farm enterprise, through the addition of an income-generating new enterprise such as farmer’s market or an herbal garden tour spreads the risk associated with traditional agricultural pursuits, and creates tourism-income on the farm without having to take the land out of agriculture. Furthermore, the advantages extend beyond the farm to embrace wider socio-economic gains:

- Agrotourism contributes to the stability of the agriculture industry of the country
- Agrotourism is an excellent means of building strong rural communities and businesses, so reducing urban-rural drift, and associated negative social impacts.
- Agrotourism is an opportunity to increase agricultural awareness and education among the public, and promote agricultural products.

2.4.3.1  Verte Valee, Guadeloupe

VERTE VALLEE, the Association pour la Protection des Patrimoines et le développement Local  de la Vallée de Grande-Rivière was formed when a few inhabitants of the Valley of Grande Rivière met and debated on the ways and means to allow their region to recover its once prosperous economic activity. This rural zone was very famous for its coffee, vanilla bean, cocoa, and citrus production until the middle of the 20th century. In 1994, all the inhabitants (500 people) of the Valley got together and founded the Verte Vallée Association whose goal was to protect
the heritage and local development of the Valley. The community agreed to promote initiatives and boost local products while preserving and enriching its heritage.

After many meetings and community gatherings, the inhabitants of the Valley designed their development project, which received funding support from the EU and won a regional award for sustainable tourism because of the significant socio-economic benefits which resulted.

2.4.3.2 **Rural Tourism Trails**

**Rural Routes** (or Rutas), including food routes or “Rutas Gastronomicas” in rural Latin America represent an important form of agrotourism. In the case of the Dominican Republic, for example, the Ruta del Café, based on an experimental Tuscan tourism model (the “Wine Road”) offers a series of routes that value coffee cultivated using sustainable techniques and certified as a quality brand (Jamao coffee). The initiative was created by Ucodep which started the foundation of a consortium of producers (Coscafè). The Ruta has not only led to the protection, promotion and improvement of the local cultural identity, but also to the diversification of income sources for all the rural families, with farmers as the most important beneficiaries, receiving up to 360% increase in their incomes over the last years, and with a progressive involvement of local producers.
2.5 Policy and Institutional Framework in Support of Agrotourism


This section presents the existing policy initiatives in the two main sectors, Agriculture and Tourism.

2.5.1 Agricultural Policy Framework

In the wider context of Latin America and the Caribbean, the AgroPlan and the AgroMatrix, developed under the Summit of the Americas process, provides the overall framework for the sustainable development of agriculture and rural life. The development of a Caribbean Strategy on Agrotourism is consistent with national, regional, hemispheric and global visions detailed in the AgroPlan, which states that a **prosperous agricultural sector forms the basis for rural prosperity, poverty reduction, food security, social equity and sustainable development.**
The seven (7) Strategic Objectives of the AgroMatrix of the Agroplan, namely Competitiveness, Sustainability, Equity, and Governance, Rural Prosperity, Food Security and Positioning are all promoted through the development of Agrotourism linkages.

**Agrotourism Contributions to Competitiveness:**
Agrotourism provides significant opportunities to stimulate entrepreneurship and businesses. The creation of Farm to Table linkages in the agri-food value chain will lead to economic activity in production of fresh produce, processed foods, and craft for trade with tourism sector, as well as the creation of rural-based sites and attractions for tourism. The enabling environment will be promoted through the demand by private sector players for supporting policies, legislation and services, such as land and water policies, incentives for infrastructural development, investment in technology and training, postharvest management systems, information and communication networks, food safety audit and certification services, insurance coverage and risk management that benefit both agriculture and tourism.

**Agrotourism Contributions to Sustainability:**
The rural landscape provides the foundation for a sustainable tourism product. By keeping land in sustainable agricultural production, and by creating tours into the rural territory for tourism, good environmental practices and integrated environmental management by communities and agri-business will be promoted. The joint interests of the public and private sector representatives of agriculture, tourism, the environment and the community will drive the consolidation of an enabling regulatory and institutional framework in areas such as land use,
Ena Harvey – IICA Hemispheric Agrotourism Specialist

protection of indigenous people, responsible exploitation of biodiversity and intellectual property.

**Agrotourism Contributions to Equity:**
In keeping with the central philosophy that “Agrotourism must be about our people and our lives”, agrotourism provides an unmatched opportunity to integrate social equity into planning economic activities. Such an approach will lead to greater social inclusion and participation, true expansion of opportunities and linkages in agriculture and tourism. The development of Agrotourism linkages will facilitate improved quality of life and access to services, for all of the production, processing and service-related activities developed in rural communities. Investments in training will create a new cadre of agro-entrepreneurs able to undertake high technology production (greenhouse, hydroponics, organics), agroprocessing, craftmaking, tour guiding, education, entertainment and site management within a rural environment.

**Agrotourism Contributions to Governance:**
The multi-sectoral nature of Agrotourism engenders public and private sector participation and cooperation, and dialogue, partnerships and commitments among actors. It provides a good base for building social capital, empowerment and strategic partnerships. The joint representation on critical issues by several partners, at national and regional levels, will help to build negotiation and dispute resolution skills and promote national policies and as well as regional and hemispheric cooperation. The sharing of best practices and success stories across the region will also promote regional and hemispheric cooperation.

2.5.1.1 Regional and Sub-Regional Initiatives

In 2007, IICA presented a vision and proposals for a Regional Agrotourism Strategy, to the joint Ministerial meeting of the Ministers of the Alliance for Agriculture and COTED at the Caribbean Week of Agriculture (CWA). The proposals were endorsed at the meeting.

The elements of the Vision are:

A flourishing AGROTOURISM sector by 2017 that:
- Showcases the Caribbean as a leading, vibrant and innovative destination for Healthy Lifestyle experiences
- Delights visitors with enriching, enjoyable and exciting visitor experiences that are distinctly and authentically Caribbean (wellness, culinary, heritage)
- Links products of indigenous farms, processing companies and craft manufacturers into the procurement and distribution networks used by the hospitality sector
- Generates business growth and profitability, attracts youth, creates jobs, and stimulates the growth of Caribbean economies
- Enriches the lifestyles of Caribbean rural communities
- Celebrates, protects and generates revenue from our Caribbean culture, heritage and magnificent natural environment
- Champions a national and regional culture of partnership through clusters and mutual respect

A central feature of the proposed 10-year implementation strategy for Caribbean Agrotourism is the establishment of a Caribbean Agrotourism Resource Centre in Barbados to provide Product Development and Business Advisory Services.

![Schematic of Proposed Implementation Format for Regional Agrotourism Strategy](image)

**Figure 2.3 Schematic of Proposed Implementation Format for Regional Agrotourism Strategy**

It was proposed that the roles and responsibilities of the Caribbean Agrotourism Centre would be:
- Oversight, monitoring and evaluation of national AT strategies
- Advocacy on issues of policy, legislation and financing, and
- Assistance to member states with respect to:
  - Links with donor and development agencies & investors
  - Links with insurance and risk coverage providers
  - Feasibility studies and investment proposals
  - Project Proposal Preparation
  - Marketing and Promotion of AT products and services
  - Development of databases to ensure consistent updating of market research
  - Education and Training Opportunities
  - Application of IT for Knowledge Management and Communication
  - Benchmarking and Best Practice Transfer
  - Development of foreign language capabilities
Within the proposed implementation plan, policy and institutional arrangements for the formulation of national agrotourism strategies and action Plans, functioning of multi-stakeholder national agro-tourism linkage committees, and the management of the implementation of the Agrotourism strategy at the regional level, are described.

Also in 2007, the 6th meeting of the OECS Ministers of Tourism held discussions held on the urgency to expand linkages between agriculture and tourism, in response to a presentation made by IICA on the Caribbean Agro-Tourism Strategy 2007-2017. The Ministers underscored the need for the OECS member countries to deepen their relationship with IICA, as a means of securing maximum benefits for the OECS by way of technical assistance, advice and capacity building, in forging greater linkages between Agriculture and Tourism. They also noted the importance of collaboration between the IICA and Chambers of Agriculture being established in the OECS, in order to achieve the institutional link required for sustainability.

In 2008, as part of a Tourism Delegation to the Heads of Government meeting in Antigua, recommendations were made for the establishment of an Agrotourism Task Force which would report to the lead Ministers for Tourism and Agriculture. This Task Force was never convened.

More recently, in a meeting of Ministers of Agriculture and Ministers of Tourism in St. Kitts (May 31- June 01, 2010), Ministers of Agriculture of the Organisation of Eastern Caribbean States(OECS) agreed on a number of decisions aimed at taking agriculture in the sub-region to a higher level and building greater synergies between agriculture and tourism.

The three main areas addressed at the meeting were Transportation, having a quality seal OECS products and Agriculture and Tourism linkage.

The Ministers mandated the OECS Secretariat to further develop the proposed new programme priorities for OECS agriculture to include:

- Identifying a set of agriculture products in which the OECS region has a competitive production and trading advantage
- Identifying and targeting appropriate private sector operators, including financial institutions, for the establishment of partnerships
- Reducing the high costs of agricultural inputs, in particular fertilisers and feeds through joint procurement
- Risk Management, including introducing and strengthening insurance arrangement for crops, livestock and fisheries
- The cross-cutting need to put measures in place to ensure preservation of environmental integrity
The OECS Agriculture Ministers also mandated the OECS Secretariat to formulate regional projects for submission under the AID for Trade initiative to support the implementation of the proposed new agriculture programme priorities.

The Ministers also agreed that the processes established by the Caribbean Regional Organisation for Standards and Quality (CROSQ), including those that are to be strengthened under various regional projects would be used as the framework for the harmonisation of standards required for the implementation of a Quality Seal for goods and services produced within various agriculture-tourism value chains in the OECS.

The Ministers mandated the OECS Secretariat to, within a three month period, identify priorities and estimate the cost of implementing those recommendations arising from the OECS Shipping Study that are pertinent to the expansion of intra-regional trade in OECS agriculture products.

Another major decision taken at the meeting was the mobilization of resources by the OECS Secretariat to undertake the necessary demand studies which would serve as the evidence base for the identification of agriculture products to be targeted for production and sale to hospitality, cruise and export markets.

The OECS Secretariat has also been mandated to organise an agriculture-tourism trade show, involving major buyers and sellers to showcase and promote new opportunities for OECS products to penetrate the identified tourism-related markets.

2.5.1.2 National Agriculture Policies

Several national agriculture sector strategies make reference to linkages with the agriculture sector. In most cases, however, there is no specific programme or plan for supporting agrotourism linkages. Nevertheless, there have been some specific developments, particularly in the seven countries which participated in the IICA-OAS project, with respect to the development of national agrotourism strategies.

In Jamaica, St. Kitts & Nevis, Trinidad & Tobago and Barbados, national agrotourism strategy documents were drafted and are being used as blueprints for further development. In at least eight IICA Caribbean countries, national agrotourism linkage committees have been established. In Barbados, this committee is actively working on a Cabinet Paper leading to the full development of an Agrotourism Strategy for Barbados.
2.5.1.3 Policy Initiatives in Support of Trade between Farmers and Hotels

There is an increasing trend for the State to become actively involved in guiding the interaction between the hotel and foodservice sector and the farming sector, given the national and long-term benefits on rural farm incomes, rural poverty, reduction of rural to urban migration, greater participation of rural communities leading to improvements in the GDP, and reduction in imports, reducing the foreign exchange demand and greater stabilization of local currencies.

In St. Kitts and Nevis for example, the Government has initiated a Stimulus Package 2009 - 2010, which promotes local procurement by hotels and restaurants. Excerpts from this package include the following statements:

“...Full Service Stand Alone Restaurants exercise best efforts in procuring local agricultural commodities which include but are not limited to produce; meats, poultry and seafood; horticulture and craft items to qualify for concessions.

In the case of the Bahamas, the Ministry of Agriculture is equipping producer groups with new management tools and skills that would help them to take advantage of available market opportunities in the hotel and restaurant industries that require large production quantities, consistent quality and regular supply. A key focus of future activities will be the promotion of sustainable production practices. This process will also integrate quality consistency, grading and yield focus as well as the protection of the environment and the health of the producers and consumers.

2.5.2 Tourism Policy Initiatives

At the level of the United Nations Consolidated SIDS Regional Programmes for Mauritius Strategy Implementation 2006 – 2008, the programme of work of the Expert Group which met in 2007 identified agrotourism linkages under the focus areas of Land Resources and Tourism. Specifically, the programme listed as one of the aims “Address the synergistic linkages between tourism and agriculture for promoting island foods and beverage supply chains, rural hospitality and agrotourism;”

In the Region, the Caribbean Sustainable Tourism Framework (March 2008) was created under the Caribbean Tourism Organisation (CTO) to serve as a guideline for member states to adapt,
develop, revise and update their tourism policies and strategies. Goal 5 of the framework’s ten guiding principles, seeks to ‘Develop and strengthen the links between tourism and other economic sectors’, and is directly relevant to support for agrotourism linkages, with areas of interest including linkages in skills development (such as training of chefs in menu design that incorporates local products). Of relevance also is Goal 4 which states ‘Ensure the sustainable use of the natural environment and the cultural heritage for benefit of all’. It addresses sustainable land and resource management, protection of coasts and reefs against weather and identification of development zones which would operate based on sustainable principles.

The framework also features six development goals which amalgamate the themes of sustainability and tourism:

1. Policy on tourism management capacity (to ensure national capacity to manage the tourism sector’s sustainability)
2. Tourism marketing policy (continuously improve sustainability of marketing mix vis-à-vis emerging trends)
3. Tourism and transportation policy (development of efficient/cost effective transportation options to facilitate a sustainable level of accessibility).
4. Policy on Tourism and the environment (sustainable use of natural environment & cultural heritage for benefit of all)
5. Policy on linkages to other economic sectors (develop/strengthen links between local & regional tourism and economic sectors to maximize positive economic effects and reduce leakages)
6. Policy on Health, Safety and Security Issues and Tourism (manage health, safety & security issues that impact tourism’s sustainability)

The Caribbean Tourism Organisation has for a long time, been a staunch advocate of agrotourism linkages. The CTO’s philosophy is clearly seen in the following quotation from the former Secretary General (now Bahamas Minister of Tourism) Vincent Vanderpool-Wallace.

“Community-based tourism is not a new concept. International experience has been documented in several destinations in Africa, Latin America and Asia yet community-based tourism development is not well known in the Caribbean. There is an emerging chorus of voices, however, exchanging experiences, gaining momentum and trying to define what this concept means to our diverse region.

There is a sense that international definitions are too narrow, not tailored to small island developing states and that the interpretation of community-based tourism should be broader in the Caribbean. It should encompass economic linkages such as farmers supplying hotels in St. Kitts and harvesters of sea moss in St. Lucia as well as a tour guide cooperative in Tobago,
fish fry vendors in Barbados, weavers in Jamaica and village excursions in the Dominican Republic.

It is my belief that all tourism in the Caribbean should be community-based tourism. Tourism should be of, by, for and with the full consent and embrace of the community. Defining it in any other way marginalises an effort that should be at the heart of our sustainable development. Communities are the carriers of our culture and our lifeboats to the future.”

At the national level in most of the countries in the Caribbean, tourism policy initiatives in support of community tourism, sector linkages, sustainable tourism, and eco-tourism form part of national tourism strategies and sector plans. Details of these are provided in the Appendix.

2.5.3 Institutional Framework in Support of Agrotourism

Figure 2.4 Range of Institutional resources required for Agrotourism Development

The multi-dimensional nature of agrotourism development requires the input of resources from various institutions including:

- Donor and financial assistance institutions (including national and regional government agencies)
- Government Ministries responsible for Agriculture, Tourism, Transportation, Trade, Environment, Health, Community Development, Education
- Technical assistance agencies (national, regional and international)
- Agencies for Disaster Risk Management, Disaster Relief and Mitigation
- Training institutions (universities, technical colleges, certification bodies)
- Organisations responsible for standards development and certification
• Industrial and Export Market Development Agencies (national and regional)

The Caribbean does not lack for institutions in all of the above areas. Several international technical assistance agencies and donor institutions are currently involved in supporting regional and national agrotourism initiatives. The problem, however, is one of coordination of policies and programmes, with the resulting absence of synergies and focus for addressing the critical issues related to agrotourism development.

In recognition of this, IICA made a strategic decision to focus on agrotourism and since 2002, the IICA Office in Barbados has been the focal point for the Institute’s actions in Agrotourism, and has taken a leading role in the region for the promotion of dialogue, exchange of information and execution of funded programmes at national, regional and international levels.

2.5.3.1 **IICA Agrotourism Programme**

The Overall Objective of the IICA Agrotourism Linkages programme is:

*To build resilience in rural communities through the realization of competitive businesses which link agricultural activities to tourism, in ways which foster environmental sustainability, validate traditional knowledge and lead to the achievement of sustainable livelihoods*

IICA’s interventions led to the early realization that successful Agrotourism Development requires an inter-sectoral and inter-agency approach, joint programming within a common policy framework and financial support. Over the 2002-2006 period, IICA established formal partnerships with the key public and private sector players in Caribbean Tourism, namely the Caribbean Tourism Organization and the Caribbean Hotel Association. IICA is a member of:

- Board of Directors and Sustainable Tourism Technical Committee of Caribbean Tourism Organisation (CTO)
- Caribbean Hotel Association (CHA) and CHA Advocacy Committee: IICA signed an official MOU with the CHA in 2005
- Barbados Hotel & Tourism Association and The Culinary Alliance of Barbados

External resources have so far been received from the OAS, CTA, CDE, UK Travel Foundation, IADB, EU, and World Bank for both regional and national projects in agrotourism. IICA was successful in obtaining funding (US$444,000) from the OAS for a 3-year (2006-2009) regional project aimed at promoting increased linkages between Tourism and Agriculture. The 7 participating Caribbean Countries were Jamaica, St. Kitts & Nevis, Commonwealth of Dominica, Barbados,
Trinidad & Tobago, Guyana and Suriname. In 2007, IICA obtained funding (£40,000) from the Commonwealth Secretariat to conduct an 8-month study on Culinary Tourism for Barbados.

The outputs of the OAS project included:

- 28 National Workshops and Meetings
- Regional Workshops
- 15 Studies & 41 consultancies
- 14 Investment Profiles for new agrotourism projects in the Caribbean
- 6 Knowledge Products
- Video showcasing Agrotourism + 40 hrs footage
- “Cultivating Agrotourism” – Guide to Developing Agrotourism Ventures
- Farm to Table Manual
- ICT Trade Software
- Agrotourism Website & Portal www.caribbeanagrotourism.com
- Interactive Mapping Software

In 2009, at the request of the OAS, IICA submitted a follow-up proposal for further development of the agrotourism sector in 15 Caribbean countries. The full proposal is provided in the Appendix.

The rapid evolution of the Caribbean initiatives, together with the confluence of global trends for authentic, socially responsible tourism products; the existence of excellent “Rural Tourism” sites and products in Latin America; changes in procurement of goods for tourism, brought about by the fuel crisis, the financial crisis and the “green guilt” of European consumers re Climate Change; all led to the creation in 2008 of a hemispheric programme in Agrotourism, and to the appointment of a Hemispheric Specialist in Agrotourism with responsibility for developing the programme across IICA’s 34 member states. The three objectives of this hemispheric programme are:

1. Strengthening the Policy and Institutional Framework in support of Agrotourism and Rural Tourism
2. Generation of Knowledge Products, Research, Creation of Knowledge Communities
3. Facilitation of business and investment opportunities and market access for stakeholders
3. STRATEGIC POLICY INITIATIVES

Two (2) key drivers are critical to the further development of Agrotourism in the Caribbean. They are:

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<tr>
<th>I. Consolidation of Legislative, Policy Institutional Framework for Increased Production, Processing and Distribution</th>
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3.1 Consolidation of Legislative, Policy Institutional Framework for Increased Production, Processing, Distribution and Trade

Decisive policies are needed with respect to:

- Regional Transportation
- Market Information Systems and IT infrastructure
- International/Regional certification and quality assurance systems
- Skills Training and Certification for new agro-preneurs (in areas such as business management, tour guiding operations, event management, preparation and serving of safe food, disaster management and emergency preparedness and communication, basic first aid and security, landscaping, foreign language skills, marketing and promotion).

3.1.1 Regional Transportation

A Hub-and-Spoke approach could be used in order to create marketing hubs for consolidation and distribution of fresh agricultural produce, processed foods and crafts. Examination of the regional geography shows that it may be practical to establish three to five nodes for consolidation and shipping of goods, viz:

1. One (and possibly two) in the northern Caribbean to account for the large tourism catchment presented by the Bahamas, Jamaica, Dominican Republic
2. One in the eastern Caribbean (this would have synergies with the OECS Shipping study and the mandates of the June meeting of Ministers)
3. One in the southern Caribbean to cater for Trinidad, Guyana and Suriname, and linked into south America (given the recent air links into Brazil and Venezuela)

4. One in Central America (possibly Belize) – given the airlinks via Copa to Panama into Central America, and given the developments with trade into Mexico with Belize.

Policies on regional transportation systems for agricultural production and trade with tourism would need to be dovetailed with policy considerations proposed in the Background Studies on Air Transportation, the Cruise Sector, the Energy Sector, and also within the context of Environmental policies.

3.1.2 Market Information Systems and IT Infrastructure

Access to accurate and real-time information on actual and forecasted demand and supply of goods and services required for trade with the tourism sector are critical. Market information systems are only as good as the data supplied, and hence policies are needed with respect to putting in place systems and technology for collecting and tracking data on production of identified crops, projected yields, harvested schedules, quality and prices.

3.1.3 International/Regional Certification and Quality Assurance Systems

This is a cross-cutting theme which relates to all of the products and services along the Agri-Food – Tourism Value chain. Specifically, these systems would include:

- Good Agricultural Practices (GAPs) for fresh produce
- HACCP and ISO certification for packhouse, abattoir and agroprocessing facilities
- Standards for farm-stay accommodation and tours
- Standards for products used in the health and wellness sector
3.1.4 Human Resource Development

This is another cross-cutting theme which relates to:

- Identification of skills required for all of the areas of opportunity identified with respect to consolidation of regional production and processing, so as to capitalize on opportunities to service the foodservice sector of the hotel, restaurant, and cruise industry;
- Identification of skill required for the establishment and management of new agrotourism sites and attractions;
- Analysis of the HR gaps, with projections consistent with industry trends;
- Development of programmes for strengthening the institutional capacity of national and regional training institutions, and Ministries of Agriculture and Tourism to provide Training and Extension support;
- Certification and accreditation of all training programmes in compliance with tourism standards and hospitality benchmarks.

3.2 Consolidation of Services in support of Investments in Agrotourism

The provision of a comprehensive slate of technical and financial support services to private entrepreneurs to develop commercially viable agrotourism projects, across the entire Agri-food – Tourism Value Chain, is critical to the sustainable development of Agrotourism in the Caribbean.

Investments in support of increased Trade Linkages would include:

Investments in Production

In the case of Jamaica, for example, the Ministry of Agriculture has identified investment potential for hot pepper and mutton production (goat and sheep), and for vegetable production using greenhouse technology.

In the case of hot pepper for example, the Ministry has calculated, based on an Economic Unit for Hot Pepper- 5 acres:
- Capital Cost-J$1.66 million
- NPV: J$3.87million
- IRR: 85%
In the case of mutton, given that over 90% of total mutton and lamb imported annually, and that in 2008, 26,000 kg valued at J$4.13 million was produced locally (compared with imports of 4,900,000 kg valued at J$777,483,000 in the same year), the Ministry has calculated, based on an Economic Unit 80 Ewes: Net returns ranging from J$850,202 in year 1 to J$1.75 million in year 7 of operation. NPV: J$2.08M and IRR: 42%

In terms of opportunities in Greenhouse Production, current total greenhouse capacity is 17 acres. In addition there is an ongoing CIDA Project involving the purchase and installing forty 3000 sq ft structures across Jamaica, which will increase greenhouse capacity by 17%. It is estimated that an additional 3 - 5 acres of greenhouse are needed to substitute import of bell peppers and an additional 2 - 4 acres to substitute import of tomatoes. The greenhouse capital cost per acre is $20 million, and investment in Greenhouse operations offers return on investment of 28% to 65%.

Additionally, there is potential for investment in the production of:

**Food Crops**
- Organic fruits, vegetables, livestock (including poultry, rabbits, small ruminants, beef and dairy cattle, indigenous species (eg. Gibnut in Belize, agouti in Trinidad)

**Ornamental Horticultural Crops**
- Plant nurseries
- Flowers and foliage
- Plants for Landscaping of tourism properties
- Organic compost (from recycled animal manures)

**Crops for Health and Wellness Markets**
- Ginger, crabwood, coconut, sorrel, aloe, cerasee, mint, hot pepper, citrus, organic sugar, sarsaparilla, mauby, cassava

**Fibre crops and Raw materials for crafts and souvenirs**
Investment in Postharvest Handling and AgroProcessing

- Packhouses for fresh fruits and vegetables
- Processing plants for the manufacture of Caribbean foods (including healthy, organic and specialty foods)
- Seafood processing plants
- Processing plants for the manufacture of virgin cooking and massage oils, extraction of oleoresins
- Processing plants for the processing of roots, grasses, seeds, etc for craft manufacture

Investment in Services across the Agri-Food Value Chain

- Produce handling and Transportation services (at national levels and inter-regionally)
- Laboratory, auditing and certification services
- Training

Investments in New Agrotourism Sites and Attractions

The OAS-IICA Agrotourism Project resulted in the development of fourteen (14) investment profiles in 7 countries. Across the Caribbean, already there exist more entrepreneurs and rural groups, who possess plans and/or property with a high tourism profile or with potential for development as an agro-tourism venture, or who are already in possession of local statutory approval to construct and put in place all necessary infra-structure for a proposed agro-tourism venture. The realization of these businesses requires significant support, particularly with respect to training of entrepreneurs in business modeling, sharing of successes and lessons learned, and institutional commitment for sustained technical assistance and financial support. Examples of potential ventures include:

**Nature and Agriculture-based Tourism**

1. Creation of Tours, Lodging and Entertainment on Farms and Rural sites
2. Upgrading and/or establishment of national Botanical Gardens
3. Development of site-based Agriculture mini-museums

**Culinary Tourism**

1. Staging of National and Regional Food Festivals, Food Art and celebrations of indigenous cuisine at hotels and restaurants, and other venues
2. Publishing and Film: Production of recipe books, reality “foodie tours” and cooking programmes for international media houses
3. Establishment of gift/souvenir companies (food and flowers)
**Health and Wellness Tourism**

1. Manufacture of medicinal and body care products based on Caribbean indigenous raw materials
2. Establishment of spas and wellness centres, particularly in areas with abundance of healing waters (eg. Bahamas, Jamaica, Haiti, Dominica, St. Lucia, St. Vincent, Guyana, Suriname)
3. Staging of Wellness Fests, Trade shows and exhibitions
4. Establishment of wholesale and retail outlets for natural foods, products and services
5. Establishment of herbal, garden and nature tours

**Heritage Tourism**

1. Establishment of regional routes and diaspora trails (based on indigenous peoples and plantation culture - Carib, Arawak, Maroon, Garifuna, African, East Indian, sugar, rum, banana, coffee, cocoa, mango, cotton, rice…)
2. Development of Certified “Ital” and “Maroon” foods for international trade in high value health and natural food markets (as is done for Kosher)
3. Establishment of Living Museums, Sites and Attractions on plantations (sugar, banana, coffee, cocoa and citrus)
4. Refurbishment of plantation houses into guest houses offering a full experience (culinary and cultural)
5. Manufacture of traditional food products based on themes and brands associated with national iconic elements (eg. BBB sheep), plantation crops and plantation life
6. Manufacture of Signature Craft and Artisanal Products based on plantation crops and plantation life
7. Staging of National and Regional Craft and Cultural Festivals
8. Publishing and Film: Production of books and films on plantation history, craft techniques and traditions, agricultural practices, food preparation….*inter alia*
4. CRITICAL NEXT STEPS

4.1 Consolidation of Legislative, Policy Institutional Framework for Increased Production, Processing and Distribution

TWO PRIORITIES are identified under the Strategic Policy Initiative (SPI) of Consolidation of Legislative, Policy Institutional Framework for Increased Production, Processing and Distribution. They are:

PRIORITY #1: Coordination, Engagement, and Collective Action

- Establishment of clear national Agrotourism Policy and Strategy in each country and in the OECS sub-region, harmonized with Regional Policy and Strategy
- Establishment of multi-stakeholder National Agriculture-Tourism Advisory Committees for strategic planning and monitoring
- Scheduled and formal dialogue for joint collaboration on Public-Private Sector initiatives (Ministries of Agriculture and Tourism, Environment and Health, CTO, CHA, FCCA, IICA, PAHO, CARICOM)
- Inclusion of Agrotourism investment proposals in CHTA’s Annual Investment Conference and the CARICOM Regional Agricultural Investment Forum (RAIF)
- Establishment of Bi-Annual forum for dialogue between Ministries of Tourism and Agriculture (similar to RIMSA for Health and Agriculture, and following on the example of the OECS Ministers of Tourism. Ministers of Tourism could be invited to the CWA and/or Minister of Agriculture to the Caribbean Week of Tourism held twice yearly)
- Preparation of proposals to access financial resources.

PRIORITY #2: Consolidation of Food Production Supply and Distribution Networks

- Conduct of demand aggregate studies to determine nodes of supply and demand, distribution networks and purchasing strategies, and select key commodities for regional trade
- Development of innovative strategies for intra-regional shipping and delivery of fresh and processed commodities
- Identification of production areas and establishment of a critical mass of production for a basket of commodities required by the tourism foodservice sector
- Provision of financial and technical support for implementation of large-scale projects involving high-level technology production systems for high value horticultural commodities (greenhouse, hydroponic and organic production systems)
- Rationalisation and consolidation of existing Buyer-Seller trade information systems
TWO PRIORITIES are also proposed under the second Strategic Policy Initiative (SPI) - Consolidation of Services in support of Investments in Agrotourism

PRIORITY #1: 
The most urgent action is the establishment of a Caribbean AgroTourism Resource Centre (CATRC) (as proposed to the joint Ministerial at the CWA in 2007).

PRIORITY #2: 
Identification and Accessing Investment Support

Investment support is needed for:

3. The establishment of the Agrotourism Resource Centre, and
4. The establishment of an Agrotourism Development Fund to support investment initiatives.

Funding for agrotourism development initiatives is linked to a variety of sources, including:

- Support provided to regional and national governments and agencies for the implementation of international and bi-lateral trade agreements, and agreed programmes of support (for example, the Regional Investment Fund, CCCCC and market support arrangements under the CSME, EPA, ACS, ALBA, Mercosur and the like)
- Programmes of international donor and technical assistance agencies, including foreign embassies;
- National programmes (development funds) funded through Ministries of Government (including Agriculture, Industry and Commerce, Environment, Tourism, Health)
- Development financing available through Investment and Export Development agencies, Business Support Organisations, Manufacturers’ Associations and Chambers of Commerce;
- Equity and investment funds from commercial and development banks, National Insurance funds, Credit Unions; as well as creative revolving funding mechanisms for low interest rate financing of microenterprises
- Private sector sources, the latter including in the case of the tourism sector, NGOs and Tour companies involved in Sustainable Tourism, Green economies, Fair Trade, SME development inter alia.
4.2 Consolidation of Services in Support of Investments in Agrotourism

PRIORITY #1:
The most urgent action is the establishment of an Agrotourism Resource Centre (as proposed to the joint Ministerial at the CWA in 2007).

Agrotourism Resource Centres provide an ever-evolving and customized set of services to their stakeholders. These services and resources reflect a combination of the capacities of the organization to develop and deliver them, as well as the industry and government issues and priorities that require attention. While it is not unusual for many of these services to be promoted as being part of a centralized ‘one stop shopping’ office, in many cases such ‘support products’ are delivered by specialized suppliers (e.g. specific government agencies, commercial consultancies, non-government organizations, universities.). In many ways such centres act more as knowledge management vehicles, than formal information delivery mechanisms.

An effective Agrotourism Resource Centre provides leadership in the development and distribution needed to support the development of competitive agrotourism products and services. This information relates to specific planning, development, and management issues deemed to be particularly important to key stakeholders. An important role of the Centre would be to actively work with its partners to establish these priorities. Research suggests that such information needs relate to several recurring themes. These include:

- understanding agrotourism markets and their behaviours;
- assessing agrotourism fit with current farming operations;
- dealing with government policies;
- addressing financial considerations;
- establishing effective marketing programs;
- developing customer friendly service programs;
- creating responsive risk management programs;
- establishing credible product and service quality standards;
- building strategic partnerships; and
- managing niche agrotourism product development opportunities.

Such a Centre would be able to address in a coordinated fashion, many (if not all) of the cross cutting issues involved in the sustainable development of agrotourism in the Caribbean.
Those services most frequently associated with model Agrotourism Resource Centres include:

- Reference Centres – collecting, classifying and distributing print and/or digital book, periodical, report, audio-visual materials on issues related to various agrotourism management issues;

- Information Retrieval – providing customized (often contract based) contacts, references, background information, and supporting documentation in hard copy and/or digital formats;

- Technical Summaries – preparing tailored (often contract based) agrotourism policy, planning, development, and management reports on specific issues in hard copy and/or digital formats;

- Newsletters - periodic digital and/or hard copy newsletters concerning agrotourism business topics such as new products and services, market trends, management strategies, legislation changes, upcoming conferences, ...

- Conferences and Workshops - periodic regional and national workshops on agrotourism issues, business management, partnership development, leadership and management strategies, emerging legislation interpretations;

- Product Quality Assurance Programs - development and delivery of quality assurance programs for approved agrotourism products and services;

- Marketing and Promotion Programs - development and management of web-based agrotourism business directories, destinations, products and services. Development and distribution of agrotourism, advertising and public relations information with tourism industry, agricultural and community partners;

- Risk Management Programs - development and management of agrotourism risk management insurance programs in conjunction with insurance companies;

- Human Resource Recruitment – development, management, and delivery of agrotourism labour force recruitment, training, and retention programs;

- Advocacy - providing advocacy positions and lobbying support for initiatives requiring the approval of governments and other stakeholder organizations (e.g. facilitating legislation, funding and technical support).
Promising ‘support centres’ are emerging in response to growing awareness of agrotourism’s potential benefits, and accelerating recognition of the need to nurture the sector’s development in a business-like fashion. For the most part, these Agrotourism Resource Centres operate as one of three basic models. Each provides varying types and levels of ‘one-stop shopping’ service to their stakeholders

4.2.1 The University Extension Service Model

Built on a long-established tradition of university-based natural resource management extension services, agrotourism has emerged in recent years as a new ‘product line’ for some post-secondary academic institutions. Typically, they are supported by a combination of funding from: university base budgets for core faculty and administrative staff; government contracts for limited term (3-5 year) on-going program initiatives (e.g. education and information dissemination); and shorter term contract based consulting and research for specific industry and government agencies. This is a particularly strong model for providing cost-effective access to information and research support related to agrotourism planning, management, and development issues. Much of the infrastructure required for their start up and management is already in place, or can be relatively easily created. A few university based agrotourism models have advisory committees (formal and informal) comprised of stakeholders linked to government and private sector agricultural organizations. Beyond core staffing, additional human resource requirements are met on a limited-term, project by project basis.

4.2.2 The Government Agency Service Model

Rooted in ‘public good’ interests associated with agricultural lands, food quality, and security, a growing number of governments are developing agrotourism sections, typically within ministries responsible for agriculture. They are supported primarily via on-going government funding for a small core (1-3 people) of ‘agrotourism specialists’ and related administrative staff. Occasionally they receive additional resources for ‘one-off’ projects that foster public-private sector partnerships with farming organizations (e.g., training workshops, research, and quality standards program development). Their intended roles are to offer ‘one-stop shopping’ information to prospective and established agrotourism operators concerning policy and regulatory requirements, business development and management resources, relevant training programs, and product and service promotional opportunities. More active government-run resource centres play a proactive role in helping industry and community organizations fund and manage applied research projects designed to address current and emerging agrotourism challenges (e.g. market research, risk management, market development,). Government based Agrotourism Resource Centres tend to focus on providing policy and planning, problem referral,
and project management support services and information that is especially relevant to government related goals.

4.2.3 The Self-Regulating Service Model

In a few jurisdictions, Agrotourism Resource Centres exist as part of a self-regulating industry organization. Designed to be ‘arm’s length from government influence’, they typically are initially funded by a government grant or public-private sector agreement covering a prescribed incubation period (~3-5) years, and then expected to be self-sustaining. Frequently mentioned aspects of their mandate(s) include:

- sharing and coordinating information on farm business management practices which prevent duplication, encourage cost-sharing, and build partnerships;
- acting as a dialogue forum on farm business management issues; and,
- assisting in the development and distribution of information concerning products and services which help increase the competitiveness of agrotourism businesses.

Typically, such resource support models are guided by a steering committee of industry leaders, and run by an executive director and administrative assistants who contract out services on a project by project basis. As opposed to the preceding models, these centres tend to have a distinctly business orientation. They focus much of their attention on providing revenue generating services to supplement their base funding. It is not unusual for such centres to require on-going infusions of ‘soft money’ in the form of government and/or industry contract funds to sustain their operation.
5. IMPLEMENTATION FRAMEWORK

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<tr>
<th>Strategic Policy Initiative</th>
<th>Consolidation of Legislative, Policy Institutional Framework for Increased Production, Processing and Distribution</th>
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<tr>
<td>Priority 1:</td>
<td>Coordination, Engagement and Collective Action</td>
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<tr>
<th>Strategies and Actions</th>
<th>Responsibility</th>
<th>Milestones</th>
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<tbody>
<tr>
<td>Establishment of clear national Agrotourism Policy and Strategy in each country and in the OECS sub-region, harmonized with Regional Policy and Strategy</td>
<td>Lead: CATRC</td>
<td>To be implemented by December 2011</td>
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<tr>
<td>Establishment of multi-stakeholder National Agriculture-Tourism Advisory Committees for strategic planning and monitoring</td>
<td>Other: Ministries of Agriculture, Tourism, Environment, Health, Education, Trade, Community Development</td>
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<tr>
<td>Scheduled and formal dialogue at the regional level, for joint collaboration on Public-Private Sector initiatives (Ministries of Agriculture and Tourism, Environment and Health, CTO, CHA, FCCA, IICA, PAHO, CARICOM). One area which holds tremendous potential is the preparation of a joint proposal for Marketing the Caribbean as a Culinary Destination.</td>
<td>CTO</td>
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<td>Inclusion of Agrotourism investment proposals in CHTA’s Annual Investment Conference and the CARICOM Regional Agricultural Investment Forum (RAIF)</td>
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<td>FCCA</td>
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<tr>
<td>Preparation of proposals to access financial resources for the promotion and marketing of Agrotourism projects</td>
<td>CARICOM Secretariat</td>
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<td></td>
<td>OECS Secretariat</td>
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</table>
- Expansion of existing national and regional Disaster Management Plans to include preservation of linkages between Agriculture and Tourism sectors, and increase the ability of communities to respond to geo-political events, natural disasters and other risks. Activities include:

  - expanding existing Disaster Management Plans to include preservation of linkages between Agriculture and Tourism sectors
  - identifying appropriate government and community networks for implementing Disaster Management Planning for Agrotourism sites and attractions, and for the protection of agricultural infrastructure and production geared for supplying the tourism sector;
  - undertaking crisis management scenario planning to identify potential crises and appropriate responses; and
  - aligning National Disaster Management Plans for Agrotourism with existing regional disaster management frameworks

<table>
<thead>
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<th>Lead: CCCCC and CDEMA</th>
<th>Other: National Ministries of Agriculture and Tourism</th>
<th>To begin implementation in 2011</th>
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<tr>
<td>Regional Security System</td>
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### Strategic Policy Initiative SPI #1

#### Consolidation of Legislative, Policy Institutional Framework for Increased Production, Processing and Distribution

**Priority 1:** Coordination, Engagement and Collective Action

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<tr>
<td><strong>PRIORITY #2: Consolidation of Food Production Supply and Distribution Networks</strong></td>
<td>Lead: CATRC</td>
<td>To be started in August 2011 for a 3-4 year period.</td>
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<tr>
<td>- Conduct of demand aggregate studies to determine nodes of supply and demand (Hub and Spoke approach), distribution networks and purchasing strategies, and select key commodities for regional trade</td>
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<td>- Development of innovative alliances and strategies for intra-regional shipping (by air and sea freight) and delivery of fresh and processed commodities</td>
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<td>- Provision of financial and technical support for implementation of large-scale projects (to achieve critical mass) involving high-level technology production systems for high value horticultural commodities (greenhouse, hydroponic and organic production systems)</td>
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Strategic Policy Initiative SPI #2 | Consolidation of Services in support of Investments in Agrotourism
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**Priority 1:** Establishment of Caribbean AgroTourism Resource Centre (CATRC)

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<tr>
<td>• Preparation of Feasibility Study and budget options for different models</td>
<td><strong>Lead:</strong> CARICOM Secretariat and <strong>Member Governments</strong>&lt;br&gt;<strong>Other:</strong> Ministries of Agriculture, Tourism, Environment, Health, Education, Trade, Community Development&lt;br&gt;CTO&lt;br&gt;CHTA&lt;br&gt;FCCA&lt;br&gt;OECS Secretariat&lt;br&gt;Caribbean Development Bank&lt;br&gt;Donor agencies&lt;br&gt;Financial institutions</td>
<td>To be started in August 2011 for a 3-5 year period.</td>
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<td>• Presentation of Study to member governments for approval and commitment to funding;</td>
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<td>• Establishment of Centre</td>
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### Strategic Policy Initiative SPI #2

**Consolidation of Services in support of Investments in Agrotourism**

### Priority #2

**Identification and Accessing of Investment Support**

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<tr>
<td>2. The establishment of an Agrotourism Development Fund to support investment initiatives.</td>
<td><strong>Other:</strong> Ministries of Agriculture, Tourism, Environment, Health, Education, Trade, Community Development</td>
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<td><strong>Major Activities will be:</strong></td>
<td><strong>CTO</strong></td>
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<td>• Development of prospectus for launching of Agrotourism Development Fund</td>
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