Study to Map Agritourism Policies in the Caribbean
EXECUTIVE SUMMARY

The international tourism sector is a vibrant and growing one, with 598 million international tourist arrivals in the first half of 2017 alone. This was an increase of 6.4 % in comparison to the same period of the previous year. The Caribbean benefited from this increase in tourist arrivals as the region experienced a 5.2% increase in international arrivals for the same period (UNWTO, CTO, 2017). Made popular by its beautiful beaches and warm weather, the countries of the Caribbean have found it necessary to diversify their tourism products as more destinations have emerged across the globe, offering similar packages of sun, sea and sand. One niche market that is being explored for diversification is agritourism. Across the region, initiatives have been made by both the public and the private sector, however the necessary policy support is absent in most countries.

The replacement of agriculture by tourism as a major income earner for several Caribbean countries, has accentuated the level of food imports entering the region, as hotels and restaurants have intentionally crafted dishes which are reflective of European and North American cuisine. Some studies have reported that leakages have been as high as 75% in some Caribbean nations. This severe impact on Caribbean economies has strengthened the position of agritourism as a sustainable means of diversification.

This study has the primary objective of mapping the existing intersectoral linkages between agriculture and tourism in the Caribbean region and identifying where the creation of an enabling policy environment is needed to leverage investments and public partnerships to promote agritourism and its’ value chains, improve agricultural productivity and to scale up local sourcing.

A survey instrument was developed and ten (10) countries were selected primarily on the basis of the performance of their agriculture and tourism sectors to participate in the survey. In order to ensure the unbiased and fair selection of these countries for this study, World Bank statistics were used to determine those Caribbean nations with the highest levels of performance in both agriculture and tourism. A Weighted Agri-Tourism Performance Index was created to be used as an indicator of a country’s potential to develop a viable agritourism sector. The 10 countries with the highest ranks on the index are: Grenada, St. Lucia, St. Vincent & the Grenadines, Belize, Jamaica, Barbados, Antigua & Barbuda, St. Kitts & Nevis, The Bahamas and Suriname. It should be noted that none of these countries have existing agritourism policies.

Six countries were then proposed to receive support from CTA and IICA to develop their agritourism sectors. They were selected based on their ongoing initiatives in agritourism as well as the relevant supporting policies which are in place and the institutions which support the development of the sector. They are: Grenada, Jamaica, Barbados, St. Lucia, Suriname and St. Vincent & the Grenadines. Recommendations for key areas of focus in the development of agritourism policies for these 6 countries were also
made. Common issues which need to be addressed under policy include: the quantity, quality and consistency of supply of produce to hotels and restaurants; timely payment to farmers and suppliers of food; the sustainable management of agricultural lands; and the development of marketing information systems.

Four additional countries are also highlighted for recommendation on future projects. They are: Dominica, Haiti, Trinidad & Tobago and Guyana.
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<tbody>
<tr>
<td>ABIS</td>
<td>Agriculture Business Information System</td>
</tr>
<tr>
<td>APP</td>
<td>Agricultural Policy Programme</td>
</tr>
<tr>
<td>ATLP</td>
<td>Agro-Tourism Linkages Programme</td>
</tr>
<tr>
<td>BASIS</td>
<td>Barbados Agricultural Statistical Information Service</td>
</tr>
<tr>
<td>BHTA</td>
<td>Barbados Hotel and Tourism Association</td>
</tr>
<tr>
<td>BIDC</td>
<td>Barbados Investment &amp; Development Corporation</td>
</tr>
<tr>
<td>BMA</td>
<td>Barbados Manufacturers Association</td>
</tr>
<tr>
<td>BMDC</td>
<td>Belize Marketing and Development Corporation</td>
</tr>
<tr>
<td>BTMI</td>
<td>Barbados Tourism Marketing Inc.</td>
</tr>
<tr>
<td>BTPA</td>
<td>Barbados Tourism Product Authority</td>
</tr>
<tr>
<td>CAHFS A</td>
<td>Caribbean Health and Food Safety Agency</td>
</tr>
<tr>
<td>CARICOM</td>
<td>Caribbean Community</td>
</tr>
<tr>
<td>CDB</td>
<td>Caribbean Development Bank</td>
</tr>
<tr>
<td>CET</td>
<td>Common External Tariff</td>
</tr>
<tr>
<td>CHTA</td>
<td>Caribbean Hotel and Tourism Association</td>
</tr>
<tr>
<td>CJCC</td>
<td>Caribbean Junior Culinary Competition</td>
</tr>
<tr>
<td>COTED</td>
<td>The Council for Trade and Economic Development</td>
</tr>
<tr>
<td>CPF</td>
<td>Country Programming Framework</td>
</tr>
<tr>
<td>CTA</td>
<td>Technical Centre for Agriculture and Rural Cooperation</td>
</tr>
<tr>
<td>CTO</td>
<td>Caribbean Tourism Organization</td>
</tr>
<tr>
<td>DOAM</td>
<td>Dominica Organic Agriculture Movement</td>
</tr>
<tr>
<td>EU</td>
<td>European Union</td>
</tr>
<tr>
<td>GDP</td>
<td>Gross Domestic Product</td>
</tr>
<tr>
<td>GRENROP</td>
<td>Grenada Network of Rural Women Producers</td>
</tr>
<tr>
<td>IICA</td>
<td>Inter American Institute for Cooperation on Agriculture</td>
</tr>
<tr>
<td>JHTA</td>
<td>Jamaica Hotel and Tourist Association</td>
</tr>
<tr>
<td>JAS</td>
<td>Jamaica Agricultural Society</td>
</tr>
<tr>
<td>Acronym</td>
<td>Description</td>
</tr>
<tr>
<td>-----------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>JNRWP</td>
<td>Jamaica Network of Rural Women Producers</td>
</tr>
<tr>
<td>MAFS</td>
<td>Ministry of Agriculture and Food Security</td>
</tr>
<tr>
<td>MALFFE</td>
<td>Ministry of Agriculture, Lands, Forestry, Fisheries and the Environment</td>
</tr>
<tr>
<td>MICAF</td>
<td>Ministry of Industry, Commerce, Agriculture &amp; Fisheries</td>
</tr>
<tr>
<td>MIF</td>
<td>Multilateral Investment Fund</td>
</tr>
<tr>
<td>NAP</td>
<td>National Agriculture Policy</td>
</tr>
<tr>
<td>NICHE</td>
<td>Nevis International Culinary Heritage Exposition</td>
</tr>
<tr>
<td>OECS</td>
<td>Organization of Eastern Caribbean States</td>
</tr>
<tr>
<td>PIR</td>
<td>Productive Import Relief</td>
</tr>
<tr>
<td>RADA</td>
<td>Rural Agricultural Development Authority</td>
</tr>
<tr>
<td>SLHTA</td>
<td>St. Lucia Hotel and Tourism Association</td>
</tr>
<tr>
<td>TPDCo</td>
<td>Tourism Product Development Company</td>
</tr>
<tr>
<td>VACH</td>
<td>Virtual Agricultural Clearing House</td>
</tr>
<tr>
<td>WB</td>
<td>World Bank</td>
</tr>
<tr>
<td>WPI</td>
<td>Weighted Performance Index</td>
</tr>
<tr>
<td>WTTC</td>
<td>World Travel and Tourism Council</td>
</tr>
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</table>
INTRODUCTION

The countries of the Caribbean have traditionally been agriculturally based economies, built on the export of sugar, bananas, coffee, cocoa, rice and citrus. Since the 1970’s, the contribution of agriculture to the economic output of most Caribbean nations has significantly declined, with the exception of Guyana, Belize, Dominica, Jamaica and St. Vincent & the Grenadines. With the rise of globalization and the removal of preferential trading agreements, Caribbean agriculture has found it challenging to remain competitive in both domestic and export markets. This lack of competitiveness has resulted in a continuous increase of food imports into the region. Furthermore, the replacement of agriculture by tourism as a major income earner for several Caribbean countries, has accentuated the level of food imports entering the region, as hotels and restaurants have intentionally crafted dishes which are reflective of European and North American cuisine. This practice has resulted in significant leakages of tourist expenditure from Caribbean economies. Some studies have reported that leakages have been as high as 75% in some Caribbean nations. However, it must be noted that this high level of leakages is not sole attributed to food production.

Statistics such as these indicate that urgent attention needs to be paid to role of the tourism sector in developing the region and ensuring that the gains received are fairly distributed among the various communities across the Caribbean. This need has been recognized and attempts are being made to address it through the diversification of Caribbean economies into agritourism. Organizations such as the CTA and IICA have continued to provide support to the development of the agritourism sector and this study represents a continuation of these efforts. As the traditional tourism product offering of sun, sea and sand has become more widely available worldwide, the need to diversify the tourism product of the Caribbean has been recognized with many countries offering a variety of options from eco-tourism to heritage and culinary tourism. Agri-tourism is also being offered and it has emerged as not only a means of diversifying the tourism product but also providing an opportunity to increase farmers’ incomes, enhance the livelihoods of rural communities and to promote food tourism and local gastronomy.

As agritourism continues to develop, the necessary policies need to be developed and enacted to guide and assist actors in the sector as it continues to grow. This study has the primary objective of mapping the existing intersectoral linkages between agriculture and tourism in the Caribbean region and identifying where the creation of an enabling policy environment is needed to leverage investments and public partnerships to promote agritourism and its’ value chains, improve agricultural productivity and to scale up local sourcing. In doing so, 10 countries will be selected primarily on the basis of the performance of their agriculture and tourism sectors. Those which do not have agritourism policies will be identified and from this group, 6 countries will be recommended to receive support from CTA and IICA to develop their agritourism sectors.
1.1 Description of indicators

In order to ensure the unbiased and fair selection of 10 Caribbean countries for this study, World Bank statistics were used to determine those Caribbean countries with the highest performance in both agriculture and tourism. In most Caribbean countries, the economies have diversified from agriculture being the main income earner, to tourism being the primary income earner. Consequently, those which have flourishing tourism sectors usually do not have very developed agriculture sectors. Initially, 12 countries with the highest performances in tourism and agriculture were selected. Tables 1 and 2 below show these countries. The figures in these tables show the average contributions to GDP of both sectors over a 5-year period. Unfortunately, some countries could not be considered. In the case of Dominica and the British Virgin Islands, these countries were devastated by the passage of Hurricanes Irma and Maria in 2017 and are currently in the process of recovering.

Table 1: Average Contribution of Agriculture to Caribbean Economies between 2012-2016

<table>
<thead>
<tr>
<th>Ranking</th>
<th>Country</th>
<th>Average Contribution of Agriculture to GDP (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Guyana</td>
<td>36.51</td>
</tr>
<tr>
<td>2</td>
<td>Belize</td>
<td>15.28</td>
</tr>
<tr>
<td>3</td>
<td>Suriname</td>
<td>9.85</td>
</tr>
<tr>
<td>4</td>
<td>St. Vincent &amp; the Grenadines</td>
<td>7.66</td>
</tr>
<tr>
<td>5</td>
<td>Jamaica</td>
<td>7.26</td>
</tr>
<tr>
<td>6</td>
<td>Grenada</td>
<td>6.86</td>
</tr>
<tr>
<td>7</td>
<td>The Dominican Republic</td>
<td>5.69</td>
</tr>
<tr>
<td>8</td>
<td>St. Lucia</td>
<td>2.48</td>
</tr>
<tr>
<td>9</td>
<td>Antigua</td>
<td>2.02</td>
</tr>
<tr>
<td>10</td>
<td>Barbados</td>
<td>1.53</td>
</tr>
<tr>
<td>11</td>
<td>St. Kitts &amp; Nevis</td>
<td>1.38</td>
</tr>
<tr>
<td>12</td>
<td>The Bahamas</td>
<td>0.99</td>
</tr>
</tbody>
</table>

Source: World Bank, 2018
Table 2: Average Contribution of Tourism to Caribbean Economies between 2012-2016

<table>
<thead>
<tr>
<th>Ranking</th>
<th>Country</th>
<th>Average Contribution of Tourism Receipts to Exports (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Grenada</td>
<td>74.52</td>
</tr>
<tr>
<td>2</td>
<td>St. Lucia</td>
<td>69.82</td>
</tr>
<tr>
<td>3</td>
<td>The Bahamas</td>
<td>69.06</td>
</tr>
<tr>
<td>4</td>
<td>Antigua &amp; Barbuda</td>
<td>64.03</td>
</tr>
<tr>
<td>5</td>
<td>St. Vincent &amp; the Grenadines</td>
<td>63.49</td>
</tr>
<tr>
<td>6</td>
<td>Jamaica</td>
<td>51.68</td>
</tr>
<tr>
<td>7</td>
<td>St. Kitts &amp; Nevis</td>
<td>50.04</td>
</tr>
<tr>
<td>8</td>
<td>Barbados</td>
<td>43.89</td>
</tr>
<tr>
<td>9</td>
<td>Belize</td>
<td>34.70</td>
</tr>
<tr>
<td>10</td>
<td>The Dominican Republic</td>
<td>33.84</td>
</tr>
<tr>
<td>11</td>
<td>Trinidad &amp; Tobago</td>
<td>5.77</td>
</tr>
<tr>
<td>12</td>
<td>Guyana</td>
<td>4.9</td>
</tr>
<tr>
<td>13</td>
<td>Suriname</td>
<td>4.13</td>
</tr>
</tbody>
</table>

Source: World Bank, 2018
A Weighted Agri-Tourism Performance Index was created to be used as an indicator of a country’s potential to develop a viable agritourism sector. This index applies a weight of 0.6 to tourism and 0.4 to agriculture. Tourism is given a higher weight because a strong tourism sector can stimulate growth and development in the agriculture sector. Each performance indicator was created using the following formula:

\[
WPI = \left[ \text{Avg. \% contribution of agriculture to GDP} \times 0.4 \right] + \left[ \text{Avg. \% contribution of tourism receipts to exports} \right]
\]

The ten (10) countries with the strongest performances in both agriculture and tourism, based in the WPI were selected for the study.

Table 3: Weighted Agri-Tourism Performance Index

<table>
<thead>
<tr>
<th>Ranking</th>
<th>Country</th>
<th>Weighted Performance Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Grenada</td>
<td>47.46</td>
</tr>
<tr>
<td>2</td>
<td>St. Lucia</td>
<td>42.88</td>
</tr>
<tr>
<td>3</td>
<td>The Bahamas</td>
<td>41.84</td>
</tr>
<tr>
<td>4</td>
<td>St. Vincent &amp; the Grenadines</td>
<td>40.56</td>
</tr>
<tr>
<td>5</td>
<td>Antigua &amp; Barbuda</td>
<td>39.23</td>
</tr>
<tr>
<td>6</td>
<td>Jamaica</td>
<td>33.92</td>
</tr>
<tr>
<td>7</td>
<td>St. Kitts &amp; Nevis</td>
<td>30.58</td>
</tr>
<tr>
<td>8</td>
<td>Barbados</td>
<td>26.95</td>
</tr>
<tr>
<td>9</td>
<td>Belize</td>
<td>26.93</td>
</tr>
<tr>
<td>10</td>
<td>The Dominican Republic</td>
<td>22.58</td>
</tr>
<tr>
<td>11</td>
<td>Guyana</td>
<td>17.55</td>
</tr>
<tr>
<td>12</td>
<td>Suriname</td>
<td>6.42</td>
</tr>
<tr>
<td>13</td>
<td>Trinidad &amp; Tobago</td>
<td>3.67</td>
</tr>
</tbody>
</table>
To gather relevant and up to date information, online surveys were also carried out. The surveys were sent to the IICA offices across the Caribbean and seven (7) responses were received from the following countries:

- The Bahamas
- Barbados
- Dominica
- Dominican Republic
- Guyana
- St. Kitts
- Trinidad & Tobago

The information gathered has been incorporated into the summaries on the selected countries.

1.2 Mapping of Selected Countries

1.2.1 Grenada

Grenada is a tri-island state consisting of the mainland, Grenada and the dependencies of Carriacou and Petit Martinique (Government of Grenada, 2018). The mainland covers an area of 120 square miles and there are approximately 107,317 inhabitants living on the three islands (WB, 2018). Agriculture was once the main contributor to Grenada's economy, acting as a monocrop sector, producing sugarcane for export. With the decline of sugar, the sector replaced this crop with others such as bananas, cocoa, nutmeg and other spices. After the island was devastated by Hurricanes Ivan and Emily in 2004 and 2005 respectively, the tourism sector saw further measures of development. Grenada is now a largely service based economy with estimated GDP earnings of US$1.056 billion in 2016 (WB, 2018) and with tourism as its primary foreign exchange earner.

Despite the contraction in agriculture's contribution to the Grenadian economy, the sector has seen growth over the past decade. Its' contribution to GDP increased from 4.6% in 2010 to 5.5% in 2014. In 2013, 9.6% of the labour force was employed in agriculture, the
The country’s agro-processing sector is also growing and includes 265 small agro-processors and several medium-sized agro-processors. 65% of these businesses are operated by women [National Agriculture Policy (NAP), 2015]. The Grenada Development Bank has also made an impressive contribution to the sector. 24% of loans approved in 2014 were for agriculture and 11% were for fishing, causing its loan portfolio to consist of 8.6% agricultural loans and 1.8% fisheries loans. On the other hand, the area of agricultural lands and the number of farms in Grenada has been declining. Between 1960 and 2012, agricultural lands decreased by 1.2% per annum. The number of farms decreased by 22% between 1995 and 2012 (NAP, 2015).

The tourism sector in Grenada is developing. It has a wide array of attractions suitable for tourists; from the traditional assets of sun sea and sand, to waterfalls, sailing, diving and hiking. It is also home to well-known agritourism sites including Belmont Estates, De la Grenade Industries, Dougalston Estate, River Antoine Rum Distillery and Organic Banana Plantation, Jessamine Eden Organic Farm, Westerhall Estate Rum Distillery and Gouyave Nutmeg Factory. Belmont Estate is a Fair-Trade certified agritourism business. Visitors are offered a tour of the plantation and can enjoy meals at its attractive 250-seat restaurant. The plantation tour includes gardens, the organic farm, the heritage museum, and the craft shops. De la Grenade Industries carries a total of 14 products including sea moss, pepper jelly, mauby syrup, nutmeg jam, guava jelly and the flagship product, La Grenade Liqueur. Grenada also offers experiences such as Gouyave Fish Friday. Tourism made a total contribution of 20.2% to Grenada’s GDP in 2016 and directly provided 5.3% of total employment (WTTC, 2016).

The country’s various festivals continue to grow and expand as actors in the tourism sector such as hotels and taxi operators, rely on and support these events. The involvement of communities in tourism activities has allowed these communities to become more economically stable (as quoted by Weaver, 2001 in Bhola-Paul, 2015). The sector has also assisted in sustaining Grenada’s natural environment through the application of entrance fees and financial contributions to protected areas such as Molinere and Dragon Bay underwater marine parks.1

There is no existing agritourism policy in effect in the island of Grenada. However, there are several other existing policies which support the development of this sector. These include the National Agricultural Plan (NAP) 2015-2030, the Growth and Poverty Reduction Strategy (GPRS) 2015-2019 and the Grenada Food and Nutrition Security Policy 2013. One area of focus under the NAP is the increase in agriculture’s contribution to national economic growth, employment generation, poverty reduction and rural development. The strengthening of linkages

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between agriculture and tourism is listed as a measure to achieve this objective. Other key areas addressed under the NAP are:

- Reducing production costs and improving the quality of agricultural produce for both domestic and international markets; and
- Increasing the income earning opportunities of those dependent on agriculture and employment opportunities in rural communities.

Grenada’s Strategic Development Plan highlights agriculture, agro-processing and tourism as priority programme areas. One of the objectives for the tourism sector is: “to define and develop the Tourism Product”. This will be done via several measures, including the promotion of intersectoral linkages. With regards to agriculture, two objectives are: promoting the interest of youth in the sector and promoting institutional linkages between the Ministry of Agriculture and the tourism sector, along with other areas. These objectives will be achieved through activities such as the review and revitalization of the Farm School and the dissemination of agricultural information on production, extension and marketing.

The Growth and Poverty Reduction Strategy 2015-2019 also explores means by which the agricultural sector can be improved as shown in its second objective, “Developing New Agriculture and Agribusiness”. Some of the activities outlined to achieve this are:

- Review and reform archaic agribusiness arrangements & institutional structure for efficiency;
- Strengthening marketing and agriculture financing arrangements.

The final policy which will be addressed is the Grenada Food and Nutrition Security Policy 2013. This policy is also accompanied by an Action Plan, to ensure implementation by 2018. The first objective of the policy is to increase the sustainable use of domestic production resources for food production.
1.2.2 St. Lucia

The island of St. Lucia has a land mass of 620 square kilometres and in 2016 its’ estimated population was 178,015 people (WB, 2018). In 2016 the estimated GDP was 1.667 billion (WB, 2018). With the loss of preferential trading agreements with the EU, the country moved from being a largely agrarian economy to a tourism-based economy and tourism now accounts for 40% of GDP while agriculture only contributed 3% as of 2013 (Ford and Dorodnykh, 2015).

Linkages between the agriculture and tourism sector have been established but these have been limited given certain challenges that the agriculture sector faces in servicing the tourism sector. 30% of the fruits and vegetables used by hotels in St. Lucia are locally sourced while the remaining 70% are imported. There is also a need for greater marketing infrastructure and the use of proper production schedules by farmers. Tourism private sector players and farmers are using ICT tools to improve market information systems. The Virtual Agricultural Clearing House (VACH) was officially launched in May 2016 under the St. Lucia Hotel and Tourism Association (SLHTA). The platform currently allows for over 400 farmers (including farmers’ cooperatives) to readily notify hotels of available produce and in return receive timely requests from hotels of items in demand. The WhatsApp platform connects 19 hoteliers and 2 large food and beverage companies with food producers. Over $800,000 in produce was traded using this platform in its’ first year (St. Lucia News Online, 2017). Another ICT tool which supports for the spread of market information is F.A.R.M.S. - Farmers Access Resource Management Solution. It is a mobile web application which connects producers and consumers in real time.

Establishing these linkages is vital for the survival of agriculture given the major role that tourism plays in the economy of St. Lucia. With the loss of preferential trading, greater focus was placed on developing the tourism sector. The Tourism Investment Act was enacted in 1996 and provided tax holidays on investments. It also provided waived import duties for building materials and equipment which were slated for tourism projects. In 2016 tourism made a total contribution of 46.5% of employment in St. Lucia. The sector also made a total contribution to GDP of 39.6%.

St. Lucia’s tourism product consists of sun, sea and sand, but it has also targeted the niche markets of eco-tourism and honeymooners. Stay over visitors in St. Lucia are recorded as having the highest levels of expenditure per person in the region. On the other
hand, the development of the tourism industry has had a negative impact on the environment over the years with respect to soil erosion, pollution of coastal waters and the loss of productive farm land among other negative effects. Faced with the growing demand for tourism and a decline in agricultural activity, many estates across the island have transformed their landscapes into eco-tourism facilities, offering visitors heritage tours, nature trails, restaurants and gift shops. Given the benefits derived from tourism, these estates now have incentives to protect their forested areas and preserve the natural environment. One of the most successful agritourism sites is the La Dauphine Estate, a former cocoa plantation which gives visitors the opportunity to experience plantation life. Island Sweet Pineapple Farm is another successful agritourism site. This farm produces mainly pineapples and water melons and provides visitors, mostly from nearby hotels with tours of the farms allowing them to observe and participate in farm activities. The St. Lucia Food and Rum Festival is also another feature of the agritourism landscape in St. Lucia. Anse Chastanet Resort is also another example of the opportunities for linkages between agriculture and tourism. Visitors to the resort can not only enjoy sun sea and sand but they can also visit the Chocolate Lab and the Emerald Estate, the resort’s organic garden.

St. Lucia does not have an existing agritourism policy, but its tourism and agriculture policies address issues which affect the sector. In 2003, The St. Lucia National Tourism Policy was established. This policy along with the National Agricultural Policy 2009-2015 make references to the importance of agritourism and measures that were to be implemented to develop the sector. One of the guiding principles under the National Tourism Policy is the full exploitation of opportunities for linkages between tourism and agriculture. The associated objective is the strengthening of backward and forward linkages between tourism and agriculture. This is to be achieved through the acceleration of policy and programme implementation to allow for increased quantity, quality and consistency of supply of agricultural products for the tourism market. The National Agricultural Policy 2009-2015 provides more detailed actions to contribute to the development of agritourism. One of the key objectives of the policy is increased efficiency and competitiveness. This will be achieved by improving marketing and production infrastructure and fostering inter-sectoral linkages. A focus was to be placed on agribusinesses which have linkages with the tourism sector. With the re-establishment of the St. Lucia Development Bank in 2008, farmers now have greater access to credit. Other proposals of the policy were offering banks tax incentives to encourage them to lend to farmers, encouraging succession planning and youth involvement in agribusiness. The agricultural policy also has the following objectives:

- Expansion of agricultural production and market base; and
- Creating new opportunities for employment and income generation in rural areas.
1.2.3 St. Vincent and the Grenadines

St. Vincent and the Grenadines consists of a short chain of island in the Caribbean Sea. The country has a total land mass of 389.3 square kilometres. The mainland, St. Vincent was formed by a volcano, La Soufriere, which is still active and serves as a tourist attraction. Most of the island’s beaches are covered by black sand, originating from the volcano. The Grenadine islands on the other hand are surrounded by white sandy beaches and clear waters. The nation has an estimated population of 109,643 as of 2016, with estimated GDP earnings of US$768 million (WB, 2018).

St. Vincent’s economy was built upon the exportation of bananas. With the end of preferential trading, banana exports and the foreign exchange earned from these exports significantly declined. The country was also impacted by drought between 2008 and 2009, followed by the passage of Hurricane Tomas in 2010. These events have had a devastating effect on St. Vincent’s agricultural sector. This contraction in the sector also resulted in reductions in rural employment and income and investment in agriculture, all contributing to increased rural poverty. However, agriculture continues to be a significant contributor to the island’s GDP. To assist in the revitalization of the sector, the FAO was appointed as the implementing agency for the project “European funded assistance to agricultural diversification in the Windward Islands”. Agriculture in St. Vincent is still impacted by several issues including:

- Small uneconomic farm sizes;
- Insufficient irrigation water and facilities;
- Difficulty in obtaining productive labour;
- Praedial Larceny /dogs damage to crops and livestock;
- Declining availability of agricultural land;
- Unattractiveness of the sector to youth;
- Low levels of on-farm technologies in production;
- Low levels of investment capital;
- Lack of incentives for agricultural entrepreneurs;
- Weak linkages with other sectors of the economy (tourism); and
- Weak farmers’/fishers’ organisations.

[Country Programming Framework (CPF) 2012-2015]
The tourism product offered in St. Vincent is focused on heritage and eco-tourism while the Grenadine islands cater to the traditional form of tourism, providing sea and sand as well as marine activities such as sailing and diving. The Grenadine islands have also been marketed as a destination for upscale tourists. Travel and tourism made a total contribution of 22.3% to the GDP of St. Vincent and the Grenadines in 2016. It also directly and indirectly contributed to 20.5% of employment in 2016. The sector also received a total of 19.1% of investment in that year (WTTC, 2017). There is no existing agritourism policy for the islands but there is a marine tourism policy which outlines the range of actions to be taken to protect the marine environment and to guide its users. However, there is a National Agritourism Committee which is tasked with directing efforts for the sustainable linkage of agriculture and tourism, supported by the Ministries of Agriculture, Tourism, Finance and Trade and the Inter-American Institute for Corporation on Agriculture (IICA). The Committee is also responsible for coordinating an agritourism linkage programme to diversify agriculture and tourism products, increase employment opportunities and enhance rural livelihoods.

Despite not having a national agritourism policy, some of St. Vincent’s other development policies speak to this developing sector. In the National Tourism Policy 2003, the following is given as an objective: “To establish and cement linkages between the tourism sectors and others such as agriculture, agro processing and fisheries to reduce the level of leakages of tourism dollars from the economy”. The National Economic and Social Development Plan 2013-2025 also addresses the necessity of linkages between tourism and agriculture and lists strategic interventions that will be brought about to build and strengthen these linkages. They are as follows: “In revitalising the agricultural sector, linkages with tourism and other sectors will be forged, thereby maximising its economic growth potential. Strategic interventions that will be pursued to achieve this are:

- Improve the legislative and institution framework to foster commercialisation of the agricultural sector.
- Create an effective policy formulation mechanism and improve the policy framework for agricultural development.
- Promote the sustainable use of land, forestry and marine resources.
- Further develop the fisheries sector.
- Facilitate the commercialisation of the livestock sector.
- Expand Agro-processing
- Increase youth involvement through agricultural training and access to land”

Although not clearly linked to agritourism, the policy states that growth in the tourism sector can arise from developing a more authentic tourism product that protects the environment and utilises as far as possible local inputs.
1.2.4 Jamaica

Jamaica is the third largest island in the Caribbean with a population of 2,728,917 as of 2017 (STATIN, 2018). The island continues to mine and export bauxite which is the main source of export earnings. However, tourism is the main foreign exchange earner in the country’s service sector (Shik et al, 2017). Tourism contributed a total of US$4.5 billion (30.3%) to Jamaica’s economy in 2016. It also made direct and indirect contributions to employment by providing 318,500 jobs (27.5%) in that same year (WTTC, 2017). Between 2010 and 2014, total visitor arrivals increased by 25% from 2.8-3.5 million and foreign exchange earnings increased by 12% from US$2 billion to US$2.4 billion (Tourism Demand Study, 2015). Jamaica’s tourism sector has a very diverse product offering, ranging from the traditional mass tourism features of sun, sea and sand to heritage tourism, eco-tourism, health and wellness tourism and agritourism among others. Linkages have already been established between agriculture and tourism through events such as the Trelawny Yam Festival and the Jamaica Jerk Festival but there is still potential for further development. An example of an agritourism venture in Jamaica is Woodford Market Garden, an organic farm found in the Blue Mountains. The farm’s Super Greens Salad Blend is certified organic and is hand delivered to customers which includes chefs and hotels. The company’s salad was the first certified organic product in the produce section of many local supermarkets. It partners with the community of Woodford, where 80% of its staff originate from. It also partners with another nearby agribusiness, Belcour Preserves to produce value added products.

The 2015 Tourism Demand Study estimated that annual leakages due to imports cost the agricultural sector between J$1.6 billion to J$5 billion. Greater linkages between farmers and hotels are one of the ways that these leakages can be reduced. However, farmers sometimes lack the production capacity to supply the desired quality and quantity of produce to hotels on a consistent basis. The success of the Sandals Hotel in sourcing local produce is a sterling example of cooperation between hotels and farmers. The government of Jamaica has also worked with businesses such as SuperClubs to launch the “Eat Jamaican” Campaign back in 2004.

The agricultural sector in Jamaica does not contribute as much as tourism to the economy. However, it is still of importance to the Jamaican economy and society. In 2014, 18% of employment stemmed from agriculture (Shik et al, 2017). With the decline of traditional export crops such as citrus and coffee, the focus is being shifted to more non-traditional crops such as yam and papaya. However, with low levels of labour and land productivity, more work needs to be done to ensure the survival of the sector and to
maintain its linkage with the tourism sector. This needed work is being carried out by bodies such as the UNDP’s GEF Projects. Jamaica has been the beneficiary of approximately 70 of these projects which provided assistance in areas such as rainwater harvesting, land management and efficient farming and water control techniques. Other programmes such as the Drip Irrigation Project were also conducted to assist farmers in developing their production methods. Under this project, farmers were provided with drip irrigation kits, water storage tanks, fertigation kits and harvesting crates. Crop farmers in Jamaica also benefit from use of the Agriculture Business Information System (ABIS), which provides them with pricing information for fruits and vegetables. There is also a range of exemptions available to farmers. They have access to Productive Import Relief (PIR) which allows for the duty-free importation of certain equipment to be used for the production of primary products or for the quality control and testing of agricultural products. The Common External Tariff (CET) and the Additional Stamp Duty are not applied to the importation of raw materials and imported farming inputs are exempted from the General Consumption Tax.

Jamaica does not have an existing agritourism policy, but its Vision 2030 policy addresses the country’s goals for its agriculture and tourism sectors. The goal for the agricultural sector is to increase the productivity of farmers through the use of research and the use of the best technology. To achieve this, the following actions will be carried out: the development of modern and efficient farming systems; the implementation of development plans for key sub-sectors; improving agricultural marketing structures and loan programmes; encouraging young people to participate in agriculture; improving the farm road network and irrigation supply systems; and increasing the use of environmental best practices. Apart of the Vision 2030 plan for tourism is to provide a world-class and very Jamaican experience in the tourism sector. Hotels, ports and tourist facilities will also be planned and operated in harmony with the natural environment. One of the actions that will be taken to achieve this is to increase the linkages between tourism and sectors such as agriculture.

One of the most commendable initiatives of the Jamaican government to develop the agritourism sector was the establishment of the Tourism Linkages Network in 2013. It was created to fulfil the Ministry of Tourism’s mandate to create and maintain linkages with key sectors such as agriculture. The Network’s prime objective is to increase the consumption of goods and services that can be competitively sourced locally.

Another policy which highlights the importance of agritourism in Jamaica is the Master Plan for Sustainable Tourism Development. One of the strategic objectives for this policy is: Achieving sustainability through improving socio-economic integration, by putting communities at the centre of the tourism planning process and by helping to preserve Jamaica’s rich heritage of the natural and built environment and its unique history and culture. The policy recognizes that the linkages between agriculture and tourism need to be improved.
The tourism industry can help increase rural incomes whilst improving the supply of food available to hotels and restaurants. Hoteliers and restaurants are challenged by the quality, quantity and consistency of supply of agricultural produce. Farmers on the other hand are unaware of the needs of hotels and restaurants which would allow them to plan their planting schedules to suit. The main problem underlying this unsatisfactory situation is the poor system of agricultural marketing in Jamaica. Jamaica is characterised by a large number of small farms which need an efficient system of marketing to bring their products to market. The policy lists the following measures which are needed to increase the purchase of local produce in the tourism sector: The key measures required to increase the purchase of local agricultural produce by the tourism industry are:

(i) TPDCo working through the JHTA and its affiliated organisations, to establish, with the support of RADA, a system for hoteliers to indicate their purchasing requirements on an annual and quarterly basis;

(ii) RADA should disseminate this information to farmers who are able to supply these needs and where appropriate, involve processors in their supply;

(iii) RADA should train intermediaries in ways to work with their clients and farmers to ensure regular supply of the produce required. It should help cement the contractual relationship between hoteliers and their suppliers and between the intermediaries and farmers;

(iv) RADA needs to work with farmers to improve seed selection, crop rotation, grading and selection and post-harvest storage and packaging to ensure a uniform, high level of quality produce presented as the hotelier or restauranteur requires.

The country’s Community Tourism Policy also addresses the importance of linkages with the agriculture sector. The final draft of the National Youth in Agriculture Policy and Implementation which was presented in 2017 is also relevant. These policies can all contribute to the development of the agritourism sector and to the drafting of specific policy.
1.2.5 Barbados

Barbados is the most easterly Caribbean island with a land mass of 430 square kilometres (FAO, 2015) and a total population of 285,000 people (WB, 2016). The island has a mostly service-based economy with tourism as its primary income earner. Traditionally an agrarian society like its neighbouring Caribbean countries, most of Barbados’ land was used for the cultivation of sugarcane which was used as an input for the production and exportation of sugar, molasses and rum. Sugarcane is still the largest contributor to the agricultural sector of Barbados, but production levels have significantly declined over the years due to the removal of preferential trading agreements. The agriculture sector has diversified into the production of greater quantities of crops such as cassava and sweet potato as well as livestock. The Ministry of Agriculture and Food Security has recently launched the Barbados Agricultural Statistical Information Service (BASIS), an online platform which provides both buyers and sellers within the sector with marketing information such as output and prices, allowing them to make more informed business decisions.

The island is now widely known as a tourism destination. Made popular by its pristine beaches, Barbados has since had to diversify its tourism product as the tourism sectors in other Caribbean islands developed, with the capability of also offering Caribbean sun, sea and sand. The island has placed emphasis on areas such as heritage and culinary tourism. With longstanding events such as the Oistins Fish Festival and more recent ones such as the Food, Rum and Wine Festival and the Taste of Barbados Food Festival, the attractiveness of culinary tourism is growing. Significant work is being conducted by organizations such as IICA, and government institutions such as the Barbados Tourism Product Authority (BTPA) which is presently drafting a Culinary Tourism Strategy.

In 2016, tourism made a total contribution of US$1,796.9 million (39.9%) to the country’s GDP. In that year it also contributed a total of 39.8% to total employment, providing 51,000 jobs. The sector was also the source of 23.3% (US$134.2 million) of total investment in the island. Despite the significant contribution that tourism has made to the economy of Barbados, the sector has also had a negative impact upon the island’s natural environment. Barbados is listed among the world’s 20 most water scarce countries (FAO, 2016). Despite this fact, there is excess water usage by hotels and their guests across the island (Greenidge and Greenidge, 2007). The location of most hotels along the coast of the island and the arrival and departure of cruise ships to the island have also negatively impacted coastal and marine ecosystems with contaminants such as oil and liquid waste. This led to the development of the sewage treatment facility along the south coast of the
island in 2004. Currently this system is in need of repair and its dysfunction is having a negative impact on many tourism dependent businesses in the area.

Barbados does not have an agritourism policy. However, several institutions are involved in developing the sector on the island. An outline of a Barbados Food Tourism Strategy and Action Plan has been drafted. Organizations such as the BTPA play an active role through creative initiatives such as Heritage Tour Walks, Dine with a Bajan, Speightstown Sizzlin’ and The Barbados Sugar and Rum Season. Presentations such as Experience Authentic Barbados and Food Tourism & Opportunities in Barbados have also been by the BTPA and IICA respectively. The Barbados Sustainable Development Policy addresses issues related to agritourism such as increasing domestic agricultural production via suitable incentive schemes and the use of as well as self-sufficiency in food production to ensure efficient use of land by the agricultural sector. The Barbados Tourism Master Plan speaks more directly to agritourism by identifying some niche markets such as culinary tourism and health & wellness tourism. It was noted that culinary tourism creates an interest in local dishes and allows for cultural exchange, international understanding and the preservation of cultural heritage; there is also greater use of local ingredients which increases demand for local agricultural production and helps reduce imports. The policy also outlines recommendations which were made at the Tourism Master Plan Workshop in 2012. Some of those recommendations are as follows: Mandating hotels and restaurants to purchase a percentage of local produce by linking to other hotel sector incentives and considering legislation regarding agricultural linkages to hotel. The policy also outlines relevant actions related to the agritourism sector. These are:

- Development of Culinary Trails
- Development of a Caribbean Culinary Institute in Barbados
- Refurbishment of Morgan Lewis Mill and Environs (completed)
- Developing a New Sugar Museum
- Creation of Natural Heritage Tour Packages
- Development of an Eco-Centre in the Scotland District
- Strengthening Cross Sectoral Linkages with Tourism Across Barbados- this includes agriculture
- Ratification of the Draft Environmental Management Work
- Enforcement of the Marine Pollution Legislation

Other initiatives in the development of agritourism are the signing of a MOU between the Barbados Agricultural Society (BAS), the Barbados Manufacturers Association (BMA) and the Barbados Hotel and Tourism Association (BHTA). The BTPA has also worked with the St. Lucy Parish Independence community on a Farm based Community Tourism project. The BHTA, funded by the Multilateral Investment Fund (MIF), is executing the “Linking Micro and Small Enterprises (MSEs) to Anchor Companies in the Barbados Hotel Value Chain” project. From this project came the “Agro-Tourism Linkages Programme” (ATLP)
which is aimed at integrating local SMEs into the tourism supply chain. The Caribbean Culinary Alliance was also launched in the island during Carifesta 2017. Chef Peter Edey is also playing his part in the agritourism sector as the founder of The Caribbean Junior Culinary Competition (CJCC). He also participated in Brussels Briefing #46 which had the theme: Agribusiness Development & Tourism Markets in SIDS. Also, in 2015, Barbados hosted the 2nd Caribbean Agribusiness Forum.

1.2.6 Belize

Belize is a country located on the mainland of Central America. However, it is still considered as a Caribbean nation and is a member of CARICOM. Also known as Mother Nature’s Best Kept Secret, Belize is 22,966 square kilometres (CARICOM, 2018) with a population of 366,954 as of 2016 (WB, 2018). Belize has one of strongest agricultural sectors in the region with 1.998 mil acres of land suitable for agriculture. The country is self-sufficient in poultry, eggs, beef, pork, beans, rice and corn production. Its main agricultural exports are sugar, bananas, citrus, timber and seafood. In the country’s National Agriculture and Food Policy, agriculture is identified as a major earner/saver of foreign exchange and as one of the main drivers of economic and social transformation in the country. However, the sector struggles in the areas of over-regulation and excess taxation. There is also a need for greater development of market information systems.

Belize’s geographic location still allows it to offer sun, sand and sea in its tourism product. However, the country focuses on the niche markets of marine, heritage, adventure and eco-tourism. Tourism made a total contribution of US$662.5 million (38.1%) to Belize’s economy in 2016. It also made a total contribution of 50,000 jobs (34.3%) to the economy in that same year. The country’s average growth rate of international arrivals of overnight visitors was higher than the annual rates of the Caribbean and of Latin America between 2010 and 2015. This shows the significant amount of potential that lies in in Belize as a tourist destination. Between 2010 and 2016, the number of hotels increased by 29.6%. However, there has not been an increase in the length of stay or spending per head of visitors. Furthermore, there has been a decline in average length of stay of overnight
visitors since 2015. In an assessment report of the country’s tourism policy, the need to develop intersectoral linkages is recognized, as well as the need to avoid overdependence on tourism.

Belize has a National Agriculture Food Policy and a Tourism Policy. However, there is no agritourism policy. Neither of the existing policies make direct references to agritourism but can still have some bearing on how the sector is developed. The main objective of the agriculture and food policy is to create an environment which is conducive to increased production and productivity, greater investment, private sector involvement in agribusiness. It is to be used as a framework to guide the development of policies that will help to transform the agriculture and food sector into a pillar of economic growth and development in Belize. The policy has 5 major pillars, one of which is: National Food and Nutrition Security and Rural Livelihoods. Achieving this pillar involves providing opportunities for rural people including women and youth to generate income from productive activities. The policy also refers to promoting specific value chains for which there are identified and growing markets and expanding inter-sectoral linkages. The Belize Tourism Policy 2015 places a high focus on the development of community tourism. One relevant guiding principal of the policy is that local communities will play a meaningful role in the sector that allows for economic, social and cultural benefits to the participating communities. Some of the objectives stated for achieving such benefits is the identification and exploitation of enhanced linkages in agriculture, arts and crafts and other areas as well as the widespread involvement of communities in the tourism sector including community resource management.

One well known agro-ecotourism venture in Belize is the Copal Tree Lodge, formerly known as Belcampo Belize. The lodge offers a wide variety of experiences incorporating agro-ecotourism, culinary tourism, farm based and community tourism and health and wellness tourism. Other areas of interest include the Garifuna village of Hopkins, Orange Walk and Corozal, all of which offer a variety of agritourism related activities.
1.2.7 St. Kitts & Nevis

St. Kitts & Nevis is a twin island Federation with a total land mass of 261 square kilometres. The nation had a population of 54,821 people as of 2016. The country also earned a GDP of US$909.9 million in this same year (WB, 2018). In 2005, the sugar industry was officially closed due to its’ inability to generate profits over time. This closure resulted in a decline in agricultural export earnings by 89% between 2014 and 2015. The agricultural sector has since diversified to include the production of hot peppers, sweet potatoes, poultry, beef and several other forms of produce.

Agriculture in St. Kitts and Nevis only contributes approximately 4% of GDP and the sector is challenged by its need to compete with the service sector for resources. Tourism is now the main foreign exchange earner for the islands. Its’ role in the economy places it in conflict with the agricultural sector as former sugarcane fields are being converted to use in tourism and labour is also being redirected to this sector. However, agriculture still has an important role to play in the economy of St. Kitts & Nevis as 60% of the island’s food supplies are being sourced from imports, consequently resulting in the leakage of foreign reserves. The sector still has challenges which limit it from meeting the food demand of the tourism industry. These are: access to land, marketing, irrigation, lack of post-harvest outlets, inconsistency of supply and low quality of local commodities. The Agricultural Policy Programme (APP) has engaged in several initiatives to build the sector including the following: providing government and farmers with improved access to improved germplasm material for more productive farming operations; exposing small farmers to the benefits of appropriate small-scale equipment and improved practices; creating a directory of major enterprises in the small ruminant and sweet potato value chain.

In the tourism sector, efforts continue to be made to diversify into other niche areas besides the 3 S’s of sun sea and sand. Agritourism is one of these areas. In 2005, the Federation hosted the workshop, “Agriculture & Tourism- Partners in Development” which was jointly hosted by IICA, CTA and the Centre for the Development of Enterprise (CDE). In 2007, IICA launched a project which resulted in the development of a National Strategy with six (6) pillars for enhancing Agritourism development in the Federation. Some successful culinary tourism ventures include Restaurant Week, the Mango Festival and the Nevis International Culinary Heritage Exposition (NICHE) Slow Food Festival. In 2008 an MOU was established between the Marriott and the St. Kitts Farmers Cooperatives Society. The Marriott also makes open market purchases of fresh produce from other local farmers.
The island of Nevis provides a formidable example of an agritourism linkage between the Four Seasons Resort and Mansa’s Farm. The Hotel has a tour for its guests on the farm. Another major development in agritourism is the Sugar Train, marketed as the last railway in the West Indies. At the end of the Sugar Train ride is a 25-acre farm which was developed by the Taiwanese government. It has a large greenhouse featuring tropical orchids, gardens and a tea house and 5 acres of different types of fruits.

Tourism in St. Kitts & Nevis made a total contribution of 25.1% (US$241.4 million) to GDP in 2016 while its total contribution to employment was 23.9% (6000 jobs) in 2016. The sector was also able to garner 17.7% of total investment for that year (WTTC, 2017). However, St. Kitts & Nevis has had several challenges in developing its tourism market. Some of these challenges are listed below:

- The high price of air lift
- Deterioration of the value for money relationship
- Lack of proper marketing and brand identity
- And a lack of training and industry standards for various areas including customer service and health and safety

The islands do not currently have an agritourism policy. There is a Food and Nutrition Security Policy but this policy does not speak to the development of the agritourism sector. The Ministry of Agriculture does have a Buy Local Eat Local campaign and through the support and finance of IICA, it was able to launch a Farmer’s Market Online Portal as a component of the Verified Agriculture Producers Reliable Supply of Quality Produce On-Farm Food Safety Practices (VRO) Agro Commerce Portal Project. In the first quarter of 2017, the agriculture sector of St. Kitts & Nevis grew by 33.9%. The Prime Minister partially attributed this to the transformation of the fishing industry and increase in linkages between agriculture and other sectors. He made note of the negotiations that were made with several hotels across the island, including the Park Hyatt Hotel, to increase the amount of local products served in their restaurants.
1.2.8 Antigua & Barbuda

The twin island nation of Antigua and Barbuda has a total land mass of 440 square kilometres and a population of 100,963 as of 2016 (WB, 2018). Like its Caribbean neighbours, Antigua and Barbuda is no longer a largely agrarian economy but the major income earner is now tourism. Sugarcane production no longer occurs and most farm lands are used for small scale agriculture. The main items produced are: crops and vegetables, sea island cotton, fruits and livestock. Agriculture in this nation struggles with its ability to meet the demand for water and land. Antigua is a water scarce country and most farmers in the nation do not have the rights to the land on which they farm. Under the Agriculture Policy Programme, some of the challenges faced by farmers have been addressed. Among these are:

- The increased access and capacity of root crop farmers to manage improved, climate ready planting material
- Educating small farmers on the benefits of appropriate small-scale equipment and improved practices
- The provision of technical assistance and equipment to SME’s to support product development

IICA has also played a role in advancing the agricultural sector by developing a concept aimed at improving competitiveness in the rural economy of Antigua & Barbuda and increasing market access for locally produced agricultural products. Some of the expected outcomes of the pilot project were:

- The tourism sector would become more competitive through the consistent availability of high quality fresh and natural agricultural products.
- Agriculture’s contribution to strengthen national economies through increased foreign exchange earnings and retention, high job creation and greater incomes distribution.

After the passage of Hurricane Irma in 2017, the agricultural sector in Barbuda was destroyed and the island was left uninhabitable. In efforts to redevelop the island, a ‘green island’ concept is being utilized. With the use of organic agriculture, smart green houses and efficient water use systems, the entire island can become an agritourism attraction.

Tourism in Antigua & Barbuda contributed a total of 60.4% (US$801.4 million) to GDP in 2016 and made a total contribution (direct and indirect) to employment of 54.3% (19,500 jobs) in that same year (WTTC, 2017). Antigua’s tourism product focuses on the
niche market of soft adventure while that of Barbuda more so lends to eco-tourism. In 2014, at a sustainable destination assessment workshop, details of a tourism action agenda were shared, outlining sustainable tourism, community-based tourism and heritage tourism as areas of focus for Antigua. The nation’s potential for agritourism was also acknowledged in the Stocktaking Report Rio +20 Antigua and Barbuda. The use of various sights and attractions to display the heritage and bio-diversity of Antigua and Barbuda was mentioned. The Ministry of Tourism is also aware of the importance of agritourism and concluded that there is both need for awareness of and education on agritourism and how it can properly function in both Antigua and Barbuda. In response, a series of awareness seminars were conducted in Antigua on the following topics: 1) What is Agritourism? 2) How to Partner to Grow Agritourism Products, 3) What is Packaging? How Do You Create Award Winning Packages in Agritourism? 4) Why is Social Media Necessary for Promoting Your Agritourism Business? 5) How to Create a Winning Website. This project resulted in familiarization tours for workers in the tourism industry, additional workshops and private consultations, training on Good Agriculture Practices (GAP), the development of an Agritourism Business Plan, and the creation of a Ministry of Tourism Agritourism Unit. In 2013 the government also completed a follow up community tourism entrepreneurship programme through Ministry of Tourism and Civil Aviation. Despite not having an agritourism policy, Antigua and Barbuda is taking steps towards developing the sector.

1.2.9 The Bahamas

The Bahamas is an archipelago of 700 islands and 2,400 cays in the Caribbean Sea with a total land mass of 5,358 square miles. The 30 inhabited islands have a total population of 391,232. The islands are known world-wide as a tourism destination offering sun, sand and sea. It was the U.S embargo against Cuba that led significant growth in the tourism sector in The Bahamas, as reported by the IMF Working Paper entitled, “Revisiting the Potential Impact to the Rest of the Caribbean from Opening U.S-Cuba Tourism”. The report also highlighted that The Bahamas was one of the few countries in the region that has seen little growth in its tourism sector since the 1990’s. In 2016 the sector contributed a total of 44.8% of GDP and made direct and indirect contributions to employment totalling 102,500 jobs (52.9% of total employment). 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. This heavy reliance on tourism makes The Bahamas very susceptible to shocks in the global economy and highlights the urgent need for diversification of the economy into viable areas such as agritourism.

This need was recognized as early as 2002 when a workshop was held for members of both the tourism and agriculture sectors as well as produce and craft producers from what are known as the Family Islands of the Bahamas. Agritourism was said to allow for the exploration of Bahamian heritage and the building of community pride. It will also provide an avenue for the diversification of both the tourism and agricultural sectors in the islands, in an environmentally sustainable manner. IICA has been working towards the development of agritourism in the Bahamas through projects such as one entitled: Strengthening Agrotourism Linkages in The Commonwealth of The Bahamas. This project was an initiative of The Bahamas Hotel Association (BHA), Bahamas Ministry of Tourism, Bahamas Agricultural and Industrial Corporation (BAIC) and the Inter-American Institute for Cooperation on Agriculture (IICA) aimed at helping to create and strengthen better linkages between tourism and agriculture and in order to take advantage of the dynamism of touristic sector at the same time of diversifying the offer of products and services. Agritourism is also slated as one of the areas of interest for the CARDI office in the Bahamas. Examples of agritourism ventures in the Bahamas are Goodfellow Farms, Down To Earth Adventure Farm and local farmers markets’ which are hosted in areas such as Potter’s Cay and Arawak Cay. There is also a Bahamas Culinary Association which promotes the use of local produce in meal preparation.

Agriculture in the Bahamas only contributes to 0.99% of GDP. However, a significant portion of this nation’s lands is suitable for agriculture and marine activities. Throughout the country’s early history, a variety of crops were cultivated on the islands including cotton, citrus, tomatoes, strawberries and hot peppers. Presently, focus is given to crops such as coconuts, pineapples and mangoes. The government has recognized the need for agriculture to encourage economic growth, trade and food and nutrition security given that The Bahamas is a net food importing country. Hotel and restaurant owners have expressed interest in obtaining produce from local farmers, but the issues of quality, quantity and consistency of supply are limiting factors. The government is encouraging and assisting farmers in this area. The sector also has other challenges including those listed below:

- The lack of finance
- Investment in infrastructural development
- Lack of equipment and technology
- Poor record keeping
- And the lack of proper crop management
- An aging cadre of farmers.
- Unattractiveness of agriculture to youth.
- Unbalanced economic development.
- Declining populations on a number of key Family Islands
- Lack of skilled manpower
- Underdevelopment of the agribusiness sector

Challenges such as these lower the productive efficiency of Bahamian farmers. However, work is being done to change this situation. Examples include the use of greenhouse technology has been adopted to facilitate the growth of high value vegetables such as broccoli and cauliflower. The government provides technical assistance for land clearing and preparation, as well as irrigation wells. Other initiatives include the implementation of training programs for persons in agricultural production.

The Bahamas does not have an agritourism policy, but other national policies make key references to the need for the establishment of linkages between agriculture and tourism. The National Development Plan of The Bahamas recognizes the shortfalls of the tourism sector and the need for increased linkages with agriculture and other sectors in the economy. One of the strategies of the plan is to ensure that the tourism sector provides greater value-added services and linkages with the rest of the economy and that the sector is a source of innovation and entrepreneurship through well-formed tourism clusters. One of the actions to be taken to achieve this is to assess the potential for backward linkages to the agriculture and specific communities or settlements. Another closely related, and more specific action plan is to facilitate and incentivise the creation of backward linkages to agriculture, fisheries. The associated outputs were:

- The creation of a linkages policy
- The establishment of “Eat Bahamian” Certification
- The identification of menu options made with local ingredients and “Eat Bahamian” options
- The creation of marketing platforms for local produce

The need for greater linkages between tourism and agriculture is also recognized in the national document, Rebuilding Bahamian Agriculture: A 20 Year Plan. The document recommends using upgraded agribusiness centres to link Bahamian processed commodities to the tourism sector.
1.2.10 Suriname

The nation of Suriname is located on the South American continent but also has historical ties to the Caribbean and consequently benefits from being a member of Caribbean and Latin American organizations. The country has a land mass of 156,000 square kilometres, 80% of which is covered by tropical rainforest and a population of 558,368 people as of 2016.

Suriname’s economy was primarily dependent upon agriculture until the rise of the mining sector in the 1990’s. Crops that were grown included cotton, sugarcane, cocoa and coffee. However, the sector is now dominated by the production of rice and bananas. Other important crops grown include vegetables, plantains, citrus, fruits, and cassava. The main livestock products include poultry meat, beef, and pork, as well as milk and eggs. Challenges are faced in ensuring that both rice and bananas remain competitive. Rice producers are faced with high input and transportation costs while banana farmers must attempt to compete with other producers across Latin America while managing crop diseases, high production costs and low labour productivity.

Even though the significance of the agricultural sector has decreased, it still plays an important socio-economic role in Suriname. Rice production plays a pivotal role in the nation’s food security and many people in rural areas still depend on agriculture for employment. Despite this, greater support is still needed in the sector. There is a lack of adequate infrastructure and services for research and development. The tenure system is also outdated and system serves as a disincentive to investment. Agriculture accounts for 5% of the country’s foreign exchange earnings (Derlagen et al, 2017). Between 2006 and 2010 agricultural production increased in real value by 36%. However, between 2001 and 2005, agriculture’s contribution to GDP fell to an annual average of 8.4% from 11.7% between 1996 and 2000 (Wondel and Eckhorst, 2012).

The tourism industry in Suriname is a small but important sector of the economy. The mining sector makes the largest contribution to the economy of Suriname unlike in other Caribbean countries, where tourism and the service sector are the largest contributors. In 2017 travel and tourism made a total contribution to GDP of US$111.7M (2.7%). The sector also contributed 2.5% of total employment (5000 jobs) (WTTC, 2018). Tourism in Suriname started slowly in the 1950’s and increased steadily until 1980 when civil unrest resulted in a fall in arrivals. Since then arrivals increased from 90,697 in 2003 to 240,041 in 2012, an increase of 168 percent over ten years (Central Bank of Suriname, 2012). The tourism sector still has several challenges including: visa access,
insufficient airport infrastructure, flight connections and road networks. The tourism product in Suriname is diverse and is characterized by niche markets such as cultural tourism and eco-tourism. As recent as March 2018, the country has been finalizing an accord with Guyana to jointly promote both countries as a multi-destination tourism experience. Areas within the tourism sector that continue to receive attention are: the need for sustainable tourism; the need for inter-sectorial linkages between the tourism sector and other sectors such as agriculture, agro-processing and the creative industries; and the potential to leverage community-based tourism as a means to alleviate poverty and enhance community well-being.

Suriname has significant potential to be an agri-ecotourism destination. Given the relatively small size of its tourism and agriculture sectors in relation to its mining sector, the country was not listed among the ten (10) countries with the highest potential to develop an agritourism sector. Nevertheless, the potential that the country holds in this sector must be addressed. More than two-thirds of the country consists of Amazonian rainforest with an immeasurable wealth of flora and fauna providing the tourism sector with a significant comparative advantage edge in this area. The country hosted CWA 2014 under the theme “Transforming Caribbean Agriculture Through Family Farming”. In a project executed by the Inter-American Institute for Cooperation on Agriculture (IICA) Suriname in collaboration with Equal Chances for Green Development, an asset database of 4 villages inhabited by indigenous Amerindian people was created. The asset base was created to determine potential of these villages to participate in community tourism. People in the villages still eat traditional Surinamese dishes on a regular basis. The majority of ingredients used for meals such as these are locally farmed or hunted in the immediate area of the village. Dishes such as these are not common in the more developed areas of Suriname and present an opportunity for a unique experience to be had by tourists seeking gastronomical satisfaction. There is also widespread knowledge among the villages and families about traditional medicinal plants. All of the villages engage in pineapple production and most of these pineapples are grown organically. However, increased pineapple cultivation, has caused further loss of native flora. Suriname also has potential with regards to agri-food trade. GOPEX International is a local family-owned agribusiness, the only one in Suriname to receive HACCP certification. It also received ISO 2002 certification. The company exports fresh produce to Holland and also supplies local fast food chains such as KFC and Pizza Hut.

Suriname has no agritourism policy nor does it have a tourism policy. However, objectives for the industry are included in the Multi-Annual Development Plan of Suriname (2005-2010). Additionally, the National Development Plan (2012-2016) includes a chapter on tourism development. The plan includes a goal to increase the economic contribution of tourism to the economy. The focus will be on developing special interest tourism especially nature-based tourism. Other areas of focus will be cultural tourism and special events. The plan does not specifically mention community-based tourism but does address the need to develop special interest tourism.
RECOMMENDATIONS FOR ACTION

The following 6 countries were selected based on their ongoing initiatives in agritourism as well as the relevant supporting policies which are in place and the institutions which aid to develop the sector. They are: Grenada, Jamaica, Barbados, St. Lucia, Suriname and St. Vincent & the Grenadines. The agritourism sectors in these countries show significant potential for development and should be considered for policy development initiatives. In this section, recommended steps of action will be given for each country. Common issues which need to be addressed by policy are the quantity, quality and consistency of supply of produce to hotels and restaurants. The timely payment of farmers by these businesses also needs to be addressed.

Grenada

Grenada is a favourable choice for this project not only because it has the highest ranking in the agritourism weighted performance index but also because the island has an already flourishing agritourism sector. It is expected that the government of Grenada, Carriacou and Petit Martinique will be supportive of this project given the existing financial support that the government offers to agribusinesses through the Grenada Development Bank as well as the direct references made to agritourism linkages in the country’s National Agricultural Plan and its’ Strategic Development Plan. In developing an agritourism policy for Grenada consideration should be given to the following areas:

- The sustainable development of the sector particularly the use of water and chemicals and the decline in available agricultural land
- Opportunities for sector development in Carriacou and Petit Martinique
- Development of the necessary infrastructure
- Providing opportunities for youth involvement
- Measures to increase the productivity of the agricultural sector
- Measures to increase the sustainability of both agriculture and tourism through agritourism
- Sustainable management of marine resources
- Emphasis on agri-food trade
- Emphasis on agro- heritage tourism

St. Lucia

St. Lucia also has a vibrant agritourism sector and it obtained the second highest ranking in the weighted performance index, making it another favourable selection for this project. The government has shown interest in the development of this sector through the development of the Virtual Agricultural Clearing House through the St. Lucia Hotel and Tourism Association and the Farmer Access Resource Management Solution. The country’s
National Tourism Policy specifically outlines plans to achieve the objective of stronger agritourism linkages. In developing an agritourism policy for St. Lucia consideration should be given to the following areas:

- Measures to increase the sustainability of both agriculture and tourism through agritourism
- Creating opportunities for women and youth within the sector
- Increasing the availability of market information
- The use of agricultural lands
- Sustainable management of marine resources

**St. Vincent & the Grenadines**

St. Vincent & the Grenadines ranked 4th in the weighted performance index and despite not having a National Agritourism Policy, its’ National Tourism Policy and National Economic and Social Development Plan 2013-2025 speak to the importance of linkages between agriculture and tourism. The support of this project by government can almost be guaranteed given that St. Vincent & the Grenadines is the only Caribbean country with a cabinet approved National Agritourism Committee. In developing an agritourism policy for St. Vincent & the Grenadines consideration should be given to the following areas:

- The use of agricultural lands
- Creating opportunities for women and youth within the sector
- Sustainable management of marine resources
- The availability of financing
- Opportunities for product development
- Emphasis on agro-eco tourism

**Jamaica**

This island obtained the 6th highest ranking in the weighted performance index and has some of the most longstanding and successful examples in agritourism linkages in the Caribbean. Even though Jamaica does not have an agritourism policy, the country’s Vision 2030 Policy and Community Tourism Policy show the important role that agritourism can play in continued development of Jamaica. The support of this sector by government was shown through the establishment and continued operation of the Tourism Linkages Network; which facilitates the building of strong linkages between tourism and agriculture and the commissioning of the Tourism Demand Study; which was able to identify the specific types of produce that can be supplied to the tourism sector in order to reduce
leakages. In developing an agritourism policy for Jamaica consideration should be given to the following areas:

- Creating opportunities and providing incentives to attract youth to the sector
- Enhance the market information system
- Emphasis on culinary tourism
- Emphasis on health and wellness tourism
- Emphasis on agri-food trade

**Barbados**

Barbados ranked 8th in the weighted performance index but its’ selection for this project is merited. It was one of six countries to respond to the questionnaire which was distributed for this study. In doing so, a wealth of information about the various agritourism related activities being pursued on the island was provided. Information provided included the existence of a draft of the Barbados Food Tourism Strategy and Action Plan. The country’s Tourism Master Plan also outlines the role of agriculture in the tourism sector. Barbados’ previous government developed the Barbados Agricultural Statistical Information Service (BASIS), a platform which can strengthen linkages between agriculture and tourism. Despite the recent change in government, the current administration listed agritourism and food/ culinary tourism in its manifesto as niche markets to be developed within the next five years. In developing an agritourism policy for Barbados consideration should be given to the following areas:

- Enhance the market information system
- The use of agricultural lands
- Emphasis on culinary tourism
- Emphasis on agri-food trade
- The sustainable use of water
- Engaging the participation of youth and women in the sector
- Sustainable management of marine resources
Suriname

As previously mentioned, Suriname has been included in this study because of the significant potential which it holds as an agritourism destination. The country was ranked 12th on the weighted performance indicator because of the significant contribution of the mining sector over both agriculture and tourism. However, the country aims to develop its tourism sector in a sustainable manner and agro-ecotourism has been a longstanding feature of the tourism product in Suriname. The country was also the host of Caribbean Week of Agriculture in 2014. It is therefore expected that the government of Suriname will support such an initiative. In developing an agritourism policy for Suriname consideration should be given to the following areas:

- Developing adequate infrastructure
- Enhancing the productivity of the labour force
- Emphasis on agri-ecotourism
- Developing agri-food trade
2.1 The Commonwealth of Dominica

The Commonwealth of Dominica is a mountainous island that has a land mass of 289.5 sq. mi. and a population of 73,543 people (WB, 2016). Traditionally the island had an agriculturally based economy, centred on the production of bananas. Since the 1980s the government has diversified the agricultural sector to include the production of other fruits such as citrus and melons. Agriculture makes a significant contribution to the economy of Dominica. The sector employs approximately one third of the labour force and contributed 10.5% of the country’s GDP in 2013 (WTO, 2014).

Governmental support is available for actors in the sector through the provision of import duty concessions on some agricultural machinery and inputs. Excise tax waivers are also available for the purchase of vehicles which are to be used in agriculture and along with this, local produce is exempted from VAT. The government of Dominica also has a National Exports Strategy which presents several priority areas for the development of agriculture. These include: the establishment of an SPS regime; the development of the agri-processing industry and the development of agritourism. On the other hand, advancement still needs to be made in the agricultural sector, specifically in the area of land management. The expansion of the agricultural sector is one of the main causes of deforestation in Dominica (GEF, 2017). Deforestation accompanied by poor zoning and a lack of flood protection measures can cause flash flooding which in turn significantly damages the country’s infrastructure. Also, given the country’s mountainous terrain, intensive land use can have severe negative impacts on the soil. The absence of land use controls for private property further accentuates this problem.

Dominica has also diversified its economy by offering ecotourism as a differentiated product to the traditional forms of tourism offered by other countries. Known as the “Nature Isle”, this island’s tourism product consists of activities such as hiking, diving, whale watching and the Kalinago Experience. Tourism is said to be the most important source of growth for the Dominican economy. The total contribution of Travel & Tourism in 2016 was 34.7% of the island’s GDP. Travel and Tourism also directly contributed to 10.4% of total employment in 2016 (WTTC, 2017). The Tourism Master Plan 2012-2022 reported the following; since 2013 the sector has seen increased budgetary allocations for marketing in its main markets of the U.S.A, the U.K, Europe and the Caribbean. There has also been an increase in promotion geared towards the boutique cruise line target market.
along with the building of a new cruise terminal and cruise village. The past few years have also seen the launch of a Tourism Development Fund which provides grants and soft loans for the upgrading/development of existing and/or new tourism related products and services. Finance is also provided for training to enhance quality standards. On the other hand, there are still several factors which restrict growth in the sector. These include: inadequate air and sea connectivity; a shortage of 'market ready' accommodation; poor tourism infrastructure such as roads, signage and sidewalks; little known presence in the market place and; dissatisfaction of tourists with the quality of the cruise product. In 2015, tourism arrivals stood at 74,474 people, a decline of 8.6% from the previous year (GOCD, 2016). This can be attributed to the passage of hurricane Erika. The island was once again severely impacted by the passage of Hurricane Maria in 2017. This would have affected both the tourism and agriculture sectors.

It should be noted that Dominica is the only Caribbean country with an agritourism policy plan and it attained a score of 47.28, the second highest ranking in weighted agri-tourism performance index. This island should therefore for future projects and fundraising.

2.2 Trinidad

Trinidad & Tobago is a twin island republic, located in the southern end of the Caribbean Sea. The nation has a total population of 1.365 million as of 2016 (WB, 2018) and a total land mass of 1,981 square miles. For most of the country’s history, the energy sector has been the major contributor to the GDP.

Tourism contributed US$2,289.7 million (7.9%) to GDP in 2016 along with 69,000 jobs (10.6% of total employment) (WTTC, 2017) while agriculture contributed US$ 110.93 million to GDP in 2016 (Central Bank of Trinidad & Tobago, 2018). The country has no existing agritourism policy but there is an ecotourism policy which came into effect in 2016. This policy acknowledges the potential that lies in developing sectors such as agritourism. Trinidad & Tobago also has a draft community-based tourism policy. This policy also recognises the importance of agritourism and highlights the success of the Brasso Seco/Paria community in this area. As a means of earning income, people in this
community facilitate a range of activities including village home stays, camping, hiking and food festivals such as Cook Fest. Other agritourism ventures in Trinidad include the Maracas Bay Agritourism Park and Orange Hill Nature Ranch in Tobago.

Trinidad & Tobago is by no means unsuitable for participation in the project. However, the country received a lower ranking on the weighted performance index than all the other countries which were considered. Additionally, the responses provided from the questionnaire which was distributed were by no means indicative of a developing agritourism sector. Despite the references made to agritourism in both the Ecotourism policy and the draft of the Community-based Tourism policy, neither provided specifics such as objectives or actions that will be carried out to develop the sector. Furthermore, as indicated in the draft of the Community-based Tourism policy, there is a need for greater infrastructure such as roads and public utilities in communities that would be suitable for developing agritourism ventures. Trinidad & Tobago would therefore be a suitable option to consider for the second phase of the project.

2.3 Guyana

The Cooperative Republic of Guyana is located on the South American continent but is also considered a Caribbean nation as a result of historical ties to the region. The nation had a total population of 773,303 as of 2016 (WB, 2018) and has a total land mass of 83,000 square miles.

Guyana is not very dependent upon its tourism sector as is the case with other Caribbean countries. The sector contributed a total of 7.3% of GDP (US$0.2 billion) in 2016 along with 7.7% of total employment (22,500 jobs) (WTTC, 2017). Agriculture, particularly sugar and rice production, along with mining and quarrying (of mostly bauxite and gold) are the major contributors to the country’s GDP. Guyana ranked 11th on the weighted performance index, above Suriname and Trinidad respectively.

In 2014, the Government of Guyana cooperated with the Guyana Bank for Trade and Industry and Conservation International Guyana to provide the community of Rupununi with a development fund of GUY $60 million. The fund
was intended to support a range of areas including agriculture and tourism based small to medium sized enterprises, agritourism, sustainable agriculture and agro-processing.

Additionally, in 2016, an agreement was signed by the Ministers of Tourism and Agriculture. Its’ purpose is to establish a framework for co-operation, dialogue and the teaming of expertise for all projects designed to advance agritourism. It is therefore likely that the government of Guyana will be willing to support efforts to create an agritourism policy for the country. In Guyana’s draft National Tourism Policy, three (3) actions are identified as necessary to build on this agreement. These are:

- Review the Cooperation Agreement with a view to updating its recommendations and making its provisions more actionable;
- Develop a Manual for Agri-Tourism to explain the form of tourism and spell out the requirements for its success; and
- Identify at least three (3) Agriculture sites that have potential for development as agritourism attractions.

The policy draft also focuses on community-based tourism and sports fishing as appropriate niche markets to exploit.

Feature of Guyana’s agritourism sector include: The Coconut Festival, the Rockstone Fish Festival and recent developments in the Essequibo Tri lake villages of Capoey, Mainstay/ Whyaka and Tapacuma/St Denny.

2.4 Haiti

The nation of Haiti is located on the western end of the island of Hispaniola. It has a total land mass of 10,714 square miles and a population of 10.85 million as of 2016 (WB, 2018). Historically, Haiti’s economy has been heavily dependent upon agriculture. However, due to a range of factors including deforestation, soil erosion, rural to urban migration, natural disasters such as earthquakes and hurricanes and a lack of necessary infrastructure to support productivity, a greater focus is now being placed on the development of the tourism sector. The government has been working with various institutions such as the CTO and IICA to reposition Haiti as a tourism destination. Initiatives included an assessment
conducted by IICA of possible opportunities for agritourism linkages in the areas of trade and rural tourism. Recommendations were made for various destinations across the island including Ile a Vache, south coast communities such as la Cayes and Saut Mathurine as well as a local business, Le Jardines Hydroponiques. Haiti’s Ministry of Tourism also signed an agreement with Inter-American Institute for Cooperation on Agriculture (IICA) to facilitate the expansion of agritourism in the country. Proposals made under the agreement include:

- Assist in upgrading the standard of the agro-tourism and nature tourism products that are offered within the tourism priority areas
- Facilitate the establishment of tourist attractions around the country
- Place the operators of agro-tourism and nature tourism attractions and products in a position to operate their sites based on the principles of sustainable tourism, while ensuring the economic survival of the activity.

Despite the potential shown for the continued development and expansion of the agritourism sector in Haiti, the country was not recommended for the proposed project because of a lack of relevant statistics to evaluate the strength of the country’s tourism and agriculture sectors relative to its Caribbean neighbours. This also prevented the country from receiving a ranking in the weighted agritourism performance index. No response was provided for the questionnaire which was distributed and challenges were faced in obtaining official government policies and documentation for both the tourism and agriculture sectors.