

GOVERNMENT OF SAINT LUCIA

Agricultural Policy Framework and Strategy (2016-2021)



FINAL DRAFT REPORT

Castries, Saint Lucia

December, 2016

Agricultural Policy Framework and Strategy

**Direct Technical Assistance to CARIFORUM countries to Develop/Strengthen
Agricultural Policies/Plans/Strategies in Five Member States**

Haiti, Guyana, St. Kitts & Nevis, Saint Lucia and St. Vincent and the Grenadines

Submitted by:

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EXECUTIVE SUMMARY

ACRONYMS AND ABBREVIATIONS

PART ONE

AGRICULTURAL SECTOR REVIEW

2. SITUATIONAL ANALYSIS

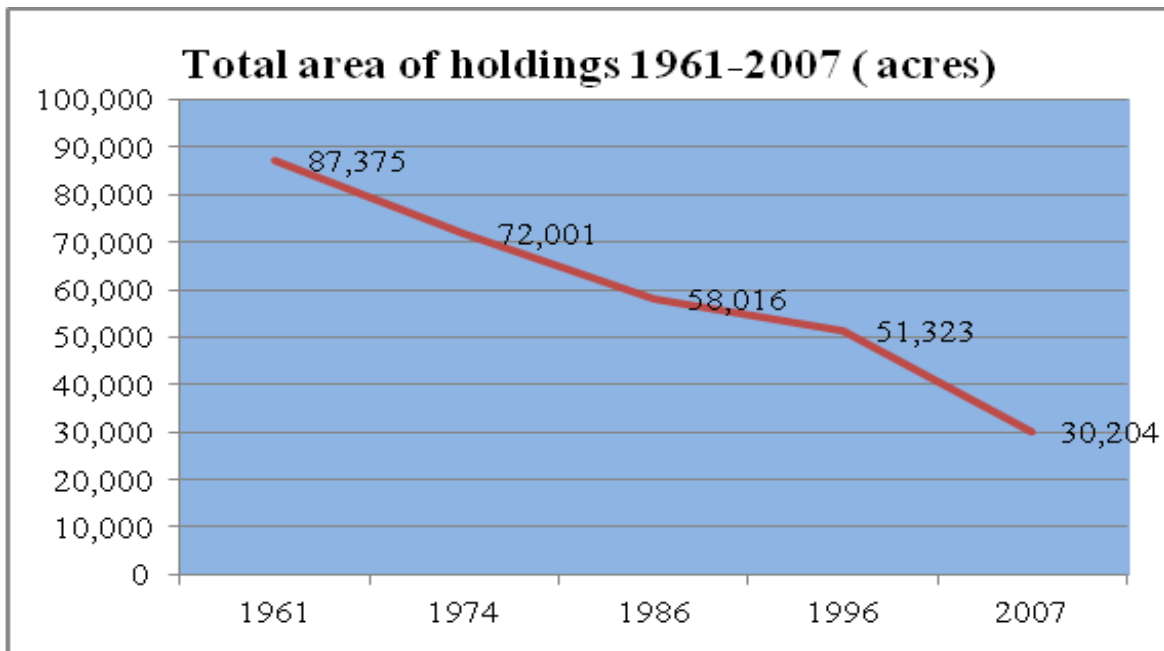
Background

Saint Lucia is located in the Eastern Caribbean archipelago and is the second largest of the Windward Islands, with an area of 616 km². The island has steep terrain especially in the interior. St Lucia has an estimated population of about 174,257 (2015) inhabitants of which 69 percent live in rural districts.

Agriculture is the dominant economic pursuit of the rural communities, and as such, plays an important role in the socio-economic development of these communities.

In the 1980 Census, the proportion of the working population involved in agriculture was 34.6 percent. This declined to 13.1 percent in 2001 and further fell to 9.4 percent in 2010. Consequently the number of acres under cultivation has declined by 42 percent from 51,323 acres in 1996 to 30,204 acres in 2007 (**Figure 1**). The greatest decrease in the number of holdings occurred in the urban part of Castries (-48.8 percent) followed by Soufriere (-42.6 percent) and Canaries (-42.1 percent).

Figure 1: Total Area of Holdings 1961-2007 (acres)

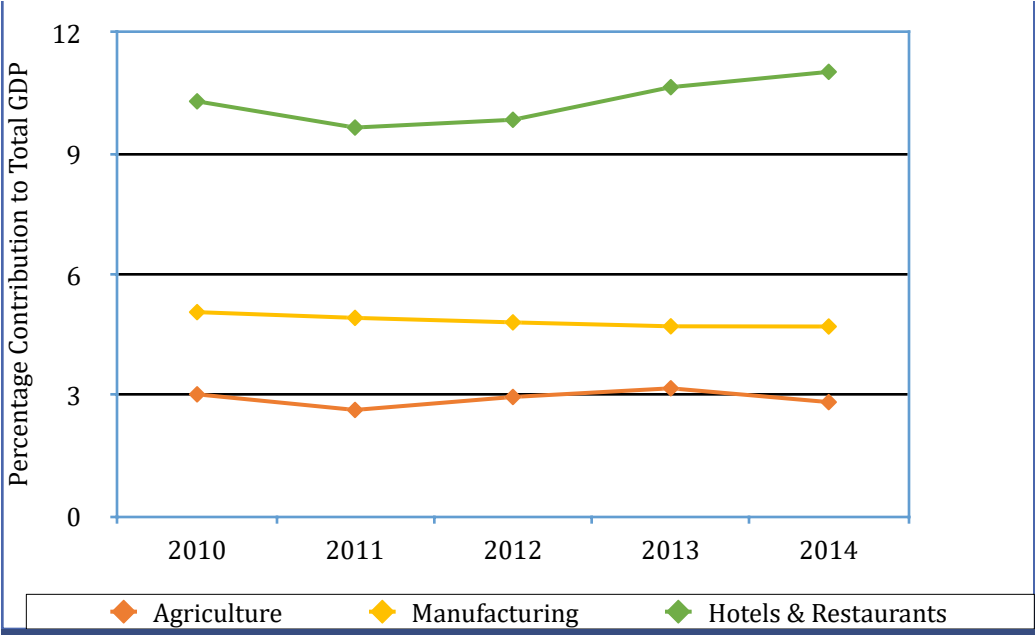


Source: Census on Agriculture 2007

1.1 Contribution of Agriculture to GDP

Figure 2 shows the contribution of three key sectors to Total GDP over the period 2010-2014. The contribution of the Agricultural sector to Total GDP declined significantly over the past decade and accounted for approximately 2.8 percent of GDP in 2014. Table 1 shows that the Total Growth Rate of the sector declined by 11.5 percent in 2014.

Figure 2: Contribution of Three Main Sectors to GDP (2010-2014)



Source: Government Statistics Department - St. Lucia

Notwithstanding the decline in the contribution of the agricultural sector to GDP to approximately 3.1 percent, agriculture remains a vital sector of Saint Lucia’s economy. However, with the decline of the banana industry, there has been an evident change in the structure of agricultural sector. The ‘other crops’ (such as plantain, eddoes, dasheen, yams, and sweet potatoes) and the livestock sub-sectors have become the buttress of the sector.

The decline in the banana industry, as a result of the loss of EU Preferential Markets has been one of the key factors contributing to the overall decline in the agricultural sector. However the high susceptibility of the island to natural disasters, such as hurricanes, as well the challenge encountered as a result of the impact of the Black Sigatoka disease has contributed to the contraction of the banana industry and overall to the Agricultural sector.

**Table 1: Agricultural Value Added (EC\$ Million) by Economic Activity at Basic Prices
(Constant Prices – 2006)**

Agricultural Activity & Percentage Contribution	2010	2011	2012	2013	2014
Bananas - GDP	27.26	14.16	21.38	20.03	12.44
% Contribution to Total GDP	1.1	0.6	0.8	0.8	0.5
Rate of Growth	-48.80%	-47.97%	50.9%	-6.3%	-37.9%
Other Crops - GDP	19.13	22.99	22.98	30.21	27.89
% Contribution to Total GDP	0.8	0.9	0.9	1.2	1.1
Rate of Growth	-20.30%	20.20%	0.0%	31.4%	-7.7%
Livestock - GDP	9.29	9.02	9.41	8.64	9.60
% Contribution to Total GDP	0.4	0.4	0.4	0.3	0.4
Rate of Growth	3.40%	-2.90%	4.3%	-8.1%	11.1%
Fishing - GDP	19.66	20.06	20.14	18.95	18.83
% Contribution to Total GDP	0.8	0.8	0.8	0.8	0.8
Rate of Growth	-0.60%	2.10%	0.4%	-5.9%	-0.6%
Forestry - GDP	1.22	1.25	1.25	1.26	1.27
% Contribution to Total GDP	0.0	0.0	0.0	0.1	0.1
Rate of Growth	-47.10%	2.50%	0.2%	0.8%	0.8%
Total Agricultural GDP	76.56	67.48	75.16	79.09	70.03
Total Agriculture Growth	-29.3%	-11.9%	11.4%	5.2%	-11.5%
% Contribution to Total GDP	3.0	2.6	3.0	3.2	2.8

Source: Government Statistics Department - St. Lucia

1.2 Public Investment in Agriculture Development (Budgetary Allocations)¹

Budgetary allocations to the agricultural sector exhibited a downward trend over the period 2011-2016, with the exception of 2012/13 during which budgetary allocations to the Agricultural Sector increased. Budgetary allocations to the Agricultural sector fell from EC\$40.4 million in 2011/12 to EC\$36.1 million in 2015/16.

During the financial year 2011/12 budgetary allocations to the agricultural sector totaled EC\$40.4 million. 45 percent of this amount (EC\$ 18.2 million) was spent on recurrent expenditure while the remaining 55 percent (EC\$22.2 million) was used for financing capital projects. The majority of finances allocated for recurrent expenditure were spent on wages and salaries and travel and subsistence. (84.6 percent). EC\$13.5 million was spent on wages and salaries while EC\$1.8 million was spent on travel and subsistence during the period 2011/12.

During the financial year 2012/13, budgetary allocations rose by 16.3 percent to EC\$47 million. This was due to a 36.9 percent increase in capital expenditure during the period 2012/13. The major capital projects implemented during 2012/13 which accounted for the bulk of expenditure included Government acquisition of agricultural lands (EC\$3.2 million), Management of Black Sigatoka (EC\$5 million), National Abattoir Project (EC\$4.5 million).

Budgetary allocations to the agricultural sector continued to decline for the remaining three years. During the financial year 2013/14, budgetary allocations to the Agricultural sector declined by 16.4 percent to EC\$39.3 million, while in 2014/15 budgetary allocations declined by 0.3 percent to EC\$39.2 million. In 2015/16, budgetary allocations to the agricultural sector declined further to EC\$36.1 million. This declining trend in budgetary allocations over the last three years was primarily due to declining amounts being allocated for capital expenditure as a result of fiscal constraints. Capital expenditure rose by 36.9 percent to EC\$30.4 million in 2012/13 and declined thereafter by 26.3 percent, 1.3 percent and 12.7 percent respectively during the financial years, 2013/14, 2014/15 and 2015/16.

Recurrent expenditure remained fairly constant over the past five years (2011-2016) with the exception of 2012/13 during which recurrent expenditure expanded by 8.8 percent to EC\$16.6 million. Recurrent expenditure rose by less than 2 percent during the financial years, 2013/14 and 2014/15 and declined by 1.8 percent in 2015/16. There was less flexibility in reducing recurrent expenditure because the majority of this expenditure consists of wages and salaries. Government employees were reluctant to accept salary deductions during the last three years resulting in recurrent expenditure being fairly constant during that period.

Table 2: Budgetary Allocations to the Agricultural Sector (2011/12 to 2015/16)

¹ *N.B- Financial year begins on April 1st and ends on March 31st*

Category of Expenditure	2011/12 EC\$ million	2012/13 EC\$ million	2013/14 EC\$ million	2014/15 EC\$ million	2015/16 EC\$ million
Recurrent Expenditure	18.2	16.6	16.9	17.1	16.8
Capital Expenditure	22.2	30.4	22.4	22.1	19.3
Total Expenditure	40.4	47.0	39.3	39.2	36.1

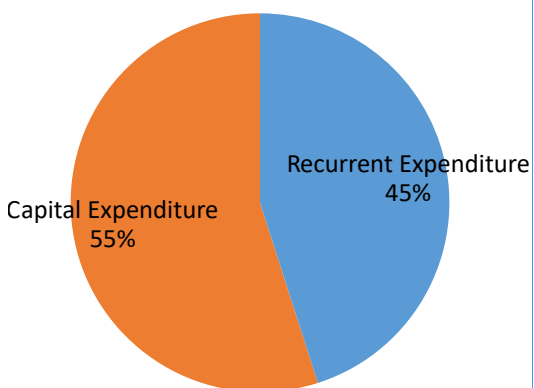
Source: Estimates of Revenue and Expenditure (2011/12-2015/16)

Figure 3: Budgetary Allocations to the Agricultural Sector (2011/12 to 2015/16)

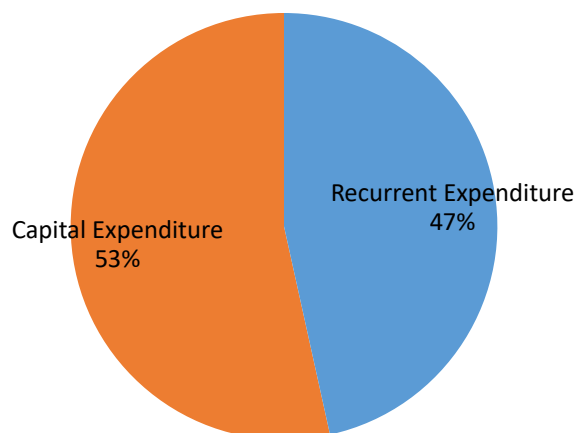
Source: Estimates of Revenue and Expenditure (2011/12-2015/16)

Figure 4: Distribution of Budgetary Allocation between Capital and Recurrent Expenses (2011/12 to 2015/16)

Budgetary Allocations to the Agricultural Sector (2011/12)



Budgetary Allocations to the Agricultural Sector (2015/16)



Source: Estimates of Revenue and Expenditure (2011/12-2015/16)

Table 3: Contribution of the Agriculture budget to the total budget (percentage)

	2010/12	2012/13	2013/14	2014/15	2015/16
Contribution of the Agriculture budget to the total budget	3.9	2.7	2.9	3.1	2.4

Source: Estimates of Revenue and Expenditure (2011/12-2015/16)

1.3 Performance of Key Sub-Sectors

Farming in St. Lucia is predominantly small scale with the average farm size estimated at 3 acres. Farming is conducted on lands of varying soil types and topography, some of which is prone to erosion by soil run-off. Agricultural production practices are generally traditional system of production with limited use of modern technologies.

Bananas

Banana production in St. Lucia has declined noticeably over the past eight years or more (Table 4). This has resulted in a significant migration of farmers out of the industry.

Table 4: Banana Production (2008-2015)

Year	2008	2009	2010	2011	2012	2013	2014	2015
Tonnes	43,798	64,273	23,975	8,157	14,011	16,611	13,621	17,452

Source: Ministry of Agriculture (Estimated Crop Production)

St. Lucia has, traditionally, been the largest exporter of bananas in the Windward Islands. During the period of peak banana production and trade, St. Lucia accounted for and estimated 53 percent of the bananas produced in the Windward Islands.

Table 5 shows the significant decline in the quantity and value of banana exports over the period 2010-2015, by two of the major exporting companies, Tropical Quality Fruit Company (TQFC) and St. Lucia National Fair Trade Organization (SLNFTO). The total volume of exports by these companies fell from 21,701tonnes in 2010 to 8,319 tonnes in 2015.

After several years of decline, banana exports increased by 28.2 percent to 15,056 tonnes in 2015 compared to an 18.4 percent fall in 2014. While exports to the United Kingdom market fell by 5.2 percent to 8,319 tonnes in 2015, the volume of exports to the Caribbean region more than doubled to 6,737 tonnes mainly reflecting a dramatic rise in exports to Trinidad and Tobago. Earnings from banana exports increased by 22.3 percent to \$22.5 million supported not only by the larger volumes but also by higher prices per tonne for bananas exported to the region.

Table 5: Banana Exports by Major Banana Companies, 2011 - 2015

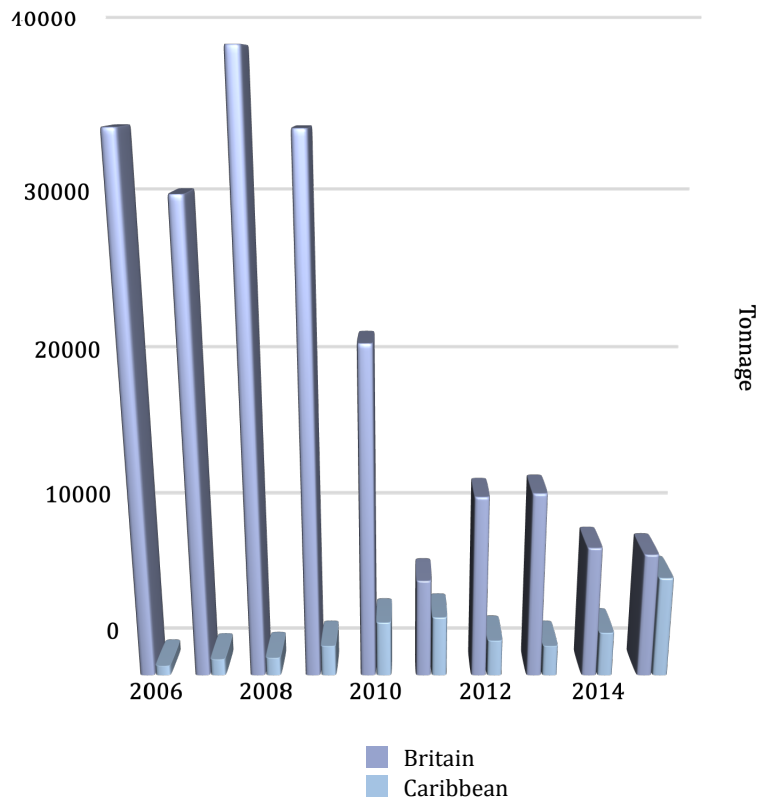
Year	FSC		TQFC		SLNFTO		TOTAL	
	Quantity	Value (\$EC)	Quantity	Value (\$EC)	Quantity	Value (\$EC)	Quantity	Value (\$EC)
2010	0	0	3,712	7,166	17,000	34,712	21,701	41,800
2011	0	0	0	0	6,557	12,955	6,557	12,955
2012	0	0	0	0	12,126	21,110	12,126	21,110
2013	0	0	270	40750	12,000	21,505	12,250	21,900
2014	0	0	347	55971	8,400	15,500	8,700	16,105
2015	0	0	127	21741	2,700	4,970	2,800	5,180
1st	0	0	154	26970	1,800	3,410	2,000	3,680
2nd	0	0	98	18571	1,300	2,680	1,400	2,860
3rd	4.9	6750	23	41400	1,600	3,080	1,900	3,500
Total	4.9	67	61	1,0	7,7	14,1	8,3	15,2

Source :

MINIFEDU

TQFC - Tropical Quality Fruit Company; SLNFTO - St. Lucia National Fair Trade Organization; FSC - Farmer

Figure 5: Banana Exports



Source: WINFRESH and Government Statistics Department (St. Lucia)

St. Lucia maintained its position as the leading banana exporter within the Windward Islands as its exports accounted for over 80 percent of total Windward Islands Banana exports over the period (2010-2014). This was principally attributed to notable decreases in banana production in the three active banana producing countries associated with the varying devastation caused by hurricanes which occurred over the past ten years, including Hurricane Ivan, Dean and Tomas. St. Lucia was the sole exporter of bananas to the UK in 2011 due to the devastation caused to many banana fields following the passage of Hurricane Tomas in October 2010. St. Lucia exported 6,401 tonnes of bananas valued at EC\$13 million to the UK in 2011. St. Lucia's share of total Windward Island banana exports to the UK continued to increase over the years and accounted for 83.9, 87.6 and 94.8 percent respectively in 2012, 2013 and 2014.

Dominica and St. Vincent were the other Windward Island banana exporting countries to the UK during the period 2010-2014 and jointly accounted for less than 20 percent of the total tonnage of bananas exported to the UK.

Table 6: Windward Islands Banana Exports to the UK (Tonnes)

Country	2010	2011	2012	2013	2014
Dominica	2,826.2	0	2,140.8	1,461	522.2
St. Vincent	3,711.6	0	838	586.1	0
St. Lucia	28,122.4	6,401	15,572.0	14,399.6	9,417.7
Total	34,660.2	6,401	18,550.8	16,446.6	9,939.9

Source: WINFRESH

St. Lucia's banana exports to the regional market grew over the five year period (2011-015). In 2011, 4,040 tonnes of bananas valued at EC\$3.9 million was exported to the region, while in 2014, 6,737 tonnes of bananas valued at EC\$7.3 million were exported to the regional market. Barbados and Trinidad accounted for the largest share of banana exports to the region over the five year period. Together they accounted for 94 percent of regional banana exports in 2015 and 100 percent of regional banana exports in 2011.

Table 7: Regional Exports of Bananas by Country, (Tonnes)

Country	2011	2012	2013	2014	2015
Anguilla		0.01			
Antigua			1.0		417.0
Barbados	2,117.8	2,310.1	1,718.8	2,530.2	2,489.4
St. Kitts & Nevis			7.5		
Trinidad	1,921.7	121.7	323.7	443.7	3,830.3
Total	4,039.5	2,431.8	2,051.0	2,973.9	6,736.7

Source: Government Statistics Department

Table 8: Regional Exports of Bananas by Country, (Value EC\$ Millions)

Country	2011 (EC\$ Millions)	2012 (EC\$ Millions)	2013 (EC\$ Millions)	2014 (EC\$ Millions)	2015 (EC\$ Millions)
Anguilla		0.0			
Antigua			0.0		0.6
Barbados	1.8	1.5	1.1	1.5	1.4
St. Kitts & Nevis			0.0		
Trinidad	2.1	0.1	0.4	0.7	5.3
Total	3.9	1.6	1.5	2.2	7.3

Source: Government Statistics Department

Cocoa

In response to the declining performance of the banana industry over the past few years, greater efforts have been focused on the rehabilitation of the cocoa industries. Cocoa has been identified as one of the commodities with significant export potential for St. Lucia. The information provided in **Table 9** shows that there was a fall in production over the period 2011 to 2012. This was primarily due to a number of agronomic, farm management and socioeconomic constraints.

Following two consecutive years of decline, the production of cocoa beans more than doubled in 2013. Production of cocoa beans grew by 129 percent to 57.7 tonnes in 2013. This increase in domestic production reflected the burgeoning local and international demand for St. Lucian cocoa beans and the recovery of cocoa fields from the adverse effects of Hurricane Tomas.

However local production of cocoa beans declined by 67.1 percent to 19 tonnes in 2014. This was attributed to drought conditions during the first six months of 2014 which resulted in reduced yields. Cocoa beans were only produced and exported during the third quarter of 2014.

Production of cocoa beans grew by 68.4 percent to 32 tonnes in 2015. This increase in production was attributed to favourable weather conditions during 2015 and the recovery of cocoa fields from drought conditions during 2014.

Revenue from the export of cocoa beans contracted by 52.5 percent to EC\$157 thousand dollars in 2014. However, revenue more than doubled in 2015 as a result of higher prices per tonnes for cocoa beans exported to the United Kingdom.

Table 9. Production and Exports of Cocoa Beans, 2010-2015

Year	Production (Tonnes)	Export	
		Quantity (Tonnes)	Value EC \$'000
2010	57.2	16.6	211.0
2011	46.1	16.6	209.0
2012	25.2	13.7	173.5
2013	57.7	25.9	330.2
2014	19.0	10.0	157.0
2015	32.0	18.0	486.3

Source: Hotel Chocolat & Foreign Trade Report

In keeping with the growth in domestic production of cocoa beans, cocoa exports rose by 89.1 percent to 25.9 tonnes in 2013. Accordingly, the value of cocoa exported increased by 90.3 percent to EC\$330.2 thousand dollars. In 2013, 20.3 tonnes of cocoa beans were exported to Hotel Chocolat UK, one of St. Lucia's major export markets in the United Kingdom for both primary and value-added cocoa.

Over the past decade the Ministry of Agriculture in St. Lucia implemented several initiatives aimed at the rehabilitation and expansion of the Cocoa industry. In 2009, projects were implemented aimed at expanding acreages in the communities of Soufriere, Saltibus and Anse la Raye. It was however necessary, as part of the expansion programme, to proceed to continue the development of an economically viable and environmentally sound cocoa production system through appropriate management practices, in order to enhance the quantity and quality of cocoa beans marketed, and to increase farm income.

Cognizant of that need, the Banana Industry Trust (BIT) and the Inter-American Institute for Cooperation on Agriculture (IICA) were contracted on behalf of the Ministry of Agriculture to implement a cocoa rehabilitation and expansion programme from 2009 to December 2010. The project was funded by the European Union.

The revitalization of the Cocoa Industry continues to be an important component of the Government's overall policy for transformation of the agricultural sector and the sustainable development of Saint Lucia through agricultural diversification.

It is a known fact that the yield of the cocoa tree is linked to the age of the tree. Whilst a tree may live over 100 years, its economic viability is about 30 – 40 years. Thereafter it is necessary to rehabilitate and replant and establish new acreages in order to ensure economically acceptable production volume and yields required to support a sustainable and viable Cocoa Industry and export markets.

Initial market research indicates that there are lucrative market opportunities available for cocoa beans and its derivatives. Besides, a review of the global cocoa market has indicated prospects for an increase in world cocoa prices in the future.

Coffee

Coffee production in Saint Lucia has declined over the past few years due to a number of agronomic, farm management and socioeconomic constraints. Initial estimates indicate an acreage equivalence of less than 25 acres of coffee scattered throughout the island, with the largest number of trees occurring in cocoa plantations in the south-western part of the island. Also, most of the existing trees are old (over 50 years), and have out-lived their yielding capacity. Currently, yield is estimated at less than one (1) metric tonne per acre. Average yield of coffee per acre is around 2 to 3 metric tonnes per acre. Local purchases of fresh coffee beans have declined from 395.93 kg (value of E.C. \$3,997.00) in 2000 to 17.73 Kg (value of E.C. \$195.00) in 2013. (*Source -Agricultural Statistics Digest- Ministry of Agriculture*).

In Saint Lucia, coffee is typically produced by small farm holders. Coffee is uniquely suited for cultivation in remote areas due to its relatively high value per weight and low perishability. Compared to other cash crops, coffee is typically cultivated under production systems that are environmentally friendly. It is commonly grown in diverse agro-forestry systems, i.e., under shade, reducing soil erosion, sustaining river base flow and maintaining watershed functions.

The expansion of the area under cultivation for coffee in Saint Lucia offers a valuable opportunity to improve livelihoods in a sustainable manner. Organic coffee promotes the use of many sustainable agricultural practices that conserve and protect and often improve the environment. Specialty and Gourmet coffee is a growing market for high quality coffee. (*Source: International Coffee Organization (ICO)*)

Saint Lucia with its year-round tropical climate and volcanic soils has a unique environment for producing a high value coffee of special quality. Therefore, the future development of coffee farmers should focus on producing high quality coffee. Thus, future plantings should be of very high quality coffees, planted in the best environments (agroecological zones) to produce quality coffees. The organic coffee industry is expanding at a very rapid rate. A potential niche market exists for specialty coffee which Saint Lucia can capitalize upon.

Coconuts

Over the past two decade the coconut industry in St. Lucia has undergone significant changes. Ageing of trees, pests and disease and decreases in domestic demand for coconut derivatives, allegedly due to associated health risk, were key challenges faced by the coconut industry during the 1990s. The local coconut oil industry declined as a result of fluctuations in market demand and the closure of a local processing plant in 2011. However, there has been renewed interest in the industry due to the demand for fresh coconut water and coconut based health and beauty products, including virgin coconut oil which is creating opportunities for farmers and processors to exploit the value added opportunities offered by this versatile crop. **Table 10** provides information on the acreage under the production of coconuts, by Agricultural Region.

Table 10: Acreages under production of Coconuts by Region in 2015

Agricultural Region (Number)	Number of Large Estates	Total Acreages
1	8	751
2	13	1161
3	26	1301
4	32	2867
5	25	2561
6	36	3084
7	18	1704
8	14	445
Total	172	13,874

Source: Ministry of Agriculture

While there are favourable market opportunities for value added coconut products in domestic and international markets, there are a number of critical challenges that needs to be addressed. These include:

- fragmented and unorganised sector;
- insufficient access to quality planting material for rehabilitation and expansion of coconut plantations;
- insufficient supply of raw materials to support growth of new product processing;
- small scale value added operations;
- lack of certification and compliance to international standards by coconut processors;
- limited access to finance to support much needed investment in the sector.

The Ministry of Agriculture in keen to develop the coconut industry and exploit value added opportunities for small scale entrepreneurs and businesses. A number of the

challenges facing the industry are currently being addressed by the Ministry in a systematic manner, through broad based participation of public and private actors along the entire value chain.

Disease resistant coconut planting materials have been procured from Mexico. They are currently stationed at the Tissue Culture Laboratory in preparation for distribution to farmers.

The Ministry of Agriculture is currently implementing a Coconut Revitalization Programme to encourage the expansion and rehabilitation of coconut trees to meet the growing demand for fresh coconut water.

Table 11: Quantity (Numbers) of Dry Coconuts purchased by Supermarkets and Hotels (2011-2015)

	2011	2012	2013	2014	2015
Supermarkets	21,060	28,603	37,602	45,902	41,963
Hotels	741	697	3,327	3,300	16,825
Total	21,801	29,300	40,929	49,202	58,788

Source: Massy Stores (St. Lucia)

Table 12: Quantity (Numbers) of 1.5 Litre Bottled Coconut water sold by Massy Stores

	2011	2012	2013	2014	2015
Massy Stores	997	2,958	17,702	22,676	34,682

Source: Massy Stores (St. Lucia)

Table 11 and **12** provides information of the purchases of dry coconuts by supermarkets and hotels. The provided information shows that purchases increased significantly over the period (2011-2015). The number of coconuts purchased from farmers in 2015 almost tripled that of 2011. In 2011, 21,801 dry coconuts were purchased from local farmers increasing to 58,788 coconuts in 2015. Over the past few years there has been increasing consumer demand for coconut derivatives particularly coconut oil which has been a major contributor to the significant increase in supermarket purchases of dry coconuts over the five year period. Although limited data exists on fresh coconut water sales in the informal market, sales of bottled coconut water by St. Lucia's largest supermarket chain (Massy Stores) indicate significant growth over the five year period (2011-2015). In 2011, 997 (1.5 litre) bottles of coconut water were sold, increasing to 34,682 bottles in 2015. Increasing demand by the domestic market was a major contributory factor to the growth in fresh coconut water sales over the period.

Fruits

Information provided by the Tissue Culture Laboratory of the Ministry of Agriculture indicates that there has been a growing demand for planting materials from farmers, particularly for citrus crops such as limes, oranges and other fruit crops. Currently, demand from farmers far outstrips the supply of fruit planting material produced by the Tissue Culture Laboratory. Financial constraints have limited the production of sufficient fruit planting material.

Table 13: Quantity (Tonnes) of domestically produced fruits (2011-2015)

Crop	2011	2012	2013	2014	2015
Fruits	3,411	3,683	4,020	3,927	4,916

Source: Ministry of Agriculture

Domestic production of fruits exhibited growth over the period 2011-2015, increasing from 3,411 tonnes in 2011 to 4,916 tonnes in 2015. This was attributed to increasing demand by local consumers and the hotel sector. Promotion of healthier eating habits through sensitization campaigns promoted by the Ministry of Health and the Ministry of Agriculture, and the increasing availability of fruit planting material to farmers and the general public were major contributors to the growth in local production of fruits.

Table 14: Quantity (Tonnes) of Fruit and Tree crops purchased by selected Marketing Outlets and Hotels (2011-2015)

Crop	2011 (Tonnes)	2012 (Tonnes)	2013 (Tonnes)	2014 (Tonnes)	2015 (Tonnes)
Fruit and Tree Crops	573	834	960	983	1,185

Source: Leading Supermarkets, Major Hotels island-wide and St. Lucia Marketing Board

Table 14 shows that the purchase of fruits and the produce of tree crops by the hotel and supermarket subsectors exhibited growth during the period (2011-2015). The total volume of fruits purchased by the hotel and supermarkets subsectors rose from 573 tonnes in 2011 to 1,185 tonnes in 2015. Local production of fruits continued to increase over the five year period as a result of increasing demand for fruits from the hotel subsector and growing demand from the local population as evidenced by increases in purchases of fruits by Massy Stores, St. Lucia's largest supermarket chain. The increase in stay-over tourist arrivals in St. Lucia over the past few years has contributed to a significant increase in the demand for local fruits such as watermelon, cantaloupes, pineapples, mangoes and other tropical fruits. The hotel sector has indicated inconsistencies in supply of fruits from local farmers, have resulted in huge imports of fruits to satisfy the needs of the growing tourist population.

The local hotel sector presents huge opportunities for the expansion of local production of fruits. In 2015, while St. Lucia’s estimated population stood at 174,257, stay over tourist arrivals was recorded at 344,908.

Vegetables

Table 15 displays a general increase in domestic production of vegetables over the past five year period. Local production of vegetables grew by 38.6 percent to 2,551 tonnes in 2015. Synonymous with the growth in local demand for fruits associated with a growing health conscious population, local production of vegetables also grew over the period as a result of increasing local demand. The increasing incidence of non-communicable diseases among the local populace has spurred demand for vegetables in an attempt to combat these lifestyle diseases. Many local consumers are becoming knowledgeable about the health benefits of vegetables and are therefore incorporating greater quantities in their diet, contributing to growing demand and increasing local production.

Table 15: Quantity (Tonnes) of domestically produced Vegetables (2011-2015)

Crop	2011	2012	2013	2014	2015
Vegetables	1,840	2,137	2,339	2,297	2,551

Source: Ministry of Agriculture

Purchases of vegetables by hotels and supermarkets grew over the period (2011-2015). In 2011, 646 tonnes of vegetables were purchased by hotels and supermarkets. The information provided in **Table 16** shows that in 2012, purchases of vegetables rose by 61 percent to 1,040 tonnes. Thereafter, increasing by 10.7, 0.9 and 7.1 percent respectively over the period 2013-2015. The ongoing assistance provided to farmers through Consolidated Foods Limited (CFL’s) support programme contributed positively to the growth in supermarket purchases of vegetables over the five year period. Under this programme, farmers are given assistance in the form of interest free loans as well as a guaranteed market for their produce.

The increase in stay-over visitors over the five year period also contributed to increases in hotel purchases of vegetables from local farmers.

Table 16: Quantity (Tonnes) of Vegetables purchased by selected marketing outlets and hotels (2011-2015)

Crop	2011	2012	2013	2014	2015
Vegetables	646	1,040	1,151	1,161	1,243

Source: Leading Supermarkets, Major Hotels Island wide and St. Lucia Marketing Board

Herbs and Spices

Local production data on Herbs and Spices is not readily available at the Ministry of Agriculture. However, purchases of Herbs and Spices by Selected Marketing Outlets and Hotels includes a wide variety of Herbs and Spices including, ginger, turmeric, basil, cinnamon, rosemary, thyme, mint, nutmeg, parsley, clove, mint, celery .

Purchases of herbs and spices by supermarkets and hotels more than doubled over the period (2011-2015), increasing from 55.4 tonnes in 2011 to 105.2 tonnes in 2015 (**Table 17**). Supermarkets accounted for the greatest proportion of total purchases of herbs and spices during the period (2012-2015). Supermarket purchases of herbs and spices rose from 25.4 tonnes in 2011 to 77.2 tonnes in 2015. In 2015, supermarkets purchased 73 percent of total purchases of herbs and spices while the hotel sector accounted for the remaining 27 percent. Chive, ginger, celery, parsley, cinnamon and turmeric accounted for the majority of herbs and spices purchases by supermarkets. Increasing awareness of the health benefits of various herbs and spices among consumers particularly ginger and turmeric has contributed to a significant increase in demand among the local populace. Purchases of turmeric by supermarkets rose from 232 kg in 2011 to 2,355 kg in 2015, while purchases of ginger rose from 5,261 kg in 2011 to 12,572 kg in 2015.

Purchases of herbs and spices by the hotel sector declined slightly over the five year period, decreasing from 29.4 tonnes in 2011 to 28 tonnes in 2015.

Table 17: Quantity (Tonnes) of Herbs and Spices purchased by selected Marketing Outlets and Hotels (2011-2015)

Crop	2011	2012	2013	2014	2015
Herbs and Spices	55.4	80.0	89.6	90.9	105.2

Source: Leading Supermarkets, Major Hotels Island wide and St. Lucia Marketing Board

Livestock

Poultry

Table 18 and 19 illustrates the production potential of the local poultry industry. Local chicken production exhibited growth during the period 2011-2014 and declined in 2015. The quantity of locally produced chicken rose from 1,408.1 tonnes in 2011 to 1823.8 tonnes in 2015. Imports of chicken also displayed increasing trends, moving from 8,279 tonnes in 2011 to 12,850 tonnes in 2015.

During the period 2011-2015, the livestock sub-sector faced a number of challenges which negatively affected production. A major challenge is the availability and the cost of feed. In June 2013, the production of feed began in the South of the island by a private company known as Caribbean Grains. This development was welcomed by the poultry sub-sector as

an indication of consistency and reliability in the supply and quality of feed on the island. However, even with the establishment of the feed mill on the island, farmers continue to grapple with the high cost of feed and to a lesser extent inconsistencies in feed supply.

The local poultry industry accounts for 28.7 percent of chicken consumed locally and 100 percent of eggs consumed on the island. St. Lucia imported 12,850 tonnes of chicken in 2014 and produced 1,925 tonnes of chicken locally in 2014. The broiler industry in St. Lucia is still small but has tremendous potential for development.

The Government has introduced a ‘safety net’ to protect the local poultry industry from imported chicken. Safety net refers to the percentage of local purchases of poultry required to be purchased by importers of poultry to ensure that local poultry producers are provided with a margin of protection or security. As part of the ‘safety net’ all importers of poultry in St. Lucia are required to purchase a certain percentage of poultry from local poultry producers before importing poultry into St. Lucia.

A safety net of 28.7% means that all importers of poultry must purchase at least 28.7% of poultry from local producers before an import license is issued. This safety net helps to protect the local poultry industry. Imported poultry is much cheaper than locally produced poultry. The safety net provides a minimum guaranteed market for local poultry producers.

To increase this safety net, the following serious challenges have to be addressed:

- There is competition with cheaper imported products.
- There is the dependence on high cost of imported feed/imported raw materials for domestic production of feed.

Processors, on the other hand, also face a number of challenges, in particular financial constraints associated with the under-utilization of their facilities, which result in cash flow difficulties.

In 2014 chicken imports amounted to 12,850 tonnes (EC\$53.5 million) or 66.7% of total meat imports which amounted to EC\$80.2 million. Poultry (primarily necks, backs, wings and other parts) is imported into St. Lucia mainly from the US and to a lesser extent the UK.

The Ministry of Agriculture, Fisheries, Physical Planning, Natural Resources and Cooperatives is currently in the process of putting measures in place to increase the safety net provided by government from 28.7% to 40%.

Table 18: Local Poultry (chicken) production (2011-2015)

Year	Whole Chicken		Mixed Parts		Total	
	Dressed Weight (Tonnes)	Value EC\$'000	Dressed Weight (Tonnes)	Value EC\$'000	Dressed Weight (Tonnes)	Value EC\$'000
2011	807.9	\$9,438.30	600.2	\$7,037.80	1408.1	\$16,476.10
2012	834.1	\$9,550.60	646.5	\$7,311.60	1480.6	\$16,862.20

2013	757.5	\$8,731.00	933.0	\$10,315.20	1690.5	\$19,046.20
2014	732.2	\$8,631.60	1193.0	\$13,852.60	1925.2	\$22,484.20
2015	676.6	\$8,061.60	1,147.2	\$13,858.70	1823.8	\$21,920.20

Source: Ministry of Agriculture (Data was obtained by compiling the local purchases from the Poultry Processors)

Table 19: Poultry Imports by Species, Quantity and Value (2011-2014)

Year	POULTRY							
	Total		Whole		Necks, Backs, Wings		Other Parts	
	Tonnes	EC\$'000	Tonnes	EC\$'000	Tonnes	EC\$'000	Tonnes	EC\$'000
2011	9,236	38,618	85	612	4,577	16,216	4,574	21,790
Chicken	8,279	33,288	9	30	4,028	13,456	4,242	19,804
Turkey	914	4,875	76	582	-	-	289	1,532
Other	43	454	0	0	-	-	43	453
2012	9,671	39,682	109	804	4,490	15,640	5,072	23,238
Chicken	8,725	34,791	3	32	3,950	13,303	4,772	21,456
Turkey	901	4,309	82	582	-	-	279	1,389
Other	45	582	24	190	-	-	21	392
2013	9,531	40,255	113	1,033	4,627	16,235	4,792	22,987
Chicken	8,550	35,549	6	38	4,003	13,823	4,542	21,688
Turkey	937	4,178	63	466	-	-	250	1,300
Other	44	529	44	529	-	-	-	-
2014	13,712	58,247	61	538	9,072	36,693	4,580	21,016
Chicken	12,850	53,537	2	29	8,472	33,743	4,376	19,765
Turkey	856	4,627	52	427	-	-	204	1,251
Other	7	82	7	82	-	-	-	-

Source: Foreign Trade Report

1/ Frozen and/or Chilled *Other specifies Ducks, Geese and Guinea Fowls*

Eggs

Local production of eggs grew over the period (2011-2015), increasing from 1.3 million dozen eggs, valued at EC\$6.9 million in 2011 to 1.5 million dozen eggs, valued at EC\$7.9 million in 2015 (**Table 20**). St. Lucia generally continued to be self-sufficient in the production of eggs over the period (2011-2015) with the exception of 2013, when 24 thousand dozen eggs were imported during the fourth quarter of 2013 to meet the increasing demand for eggs during the Christmas season. Saint Lucia has however achieved self-sufficiency in the production of eggs since 2008.

Table 20: Egg Production (2011-2015)

Year	Average Laying Stock on Farm (000) Hens	Local Production		Imports		Available Supply	
		Quantity (000) Dozen Eggs	Producer Value EC\$'000	Quantity (000) Dozen Eggs	Producer Value EC\$'000	Quantity (000) Dozen Eggs	Producer Value EC\$'000
2011	65	1,262	6,947	-	-	1,262	6,947
2012	63	1,187	7,126	-	-	1,187	7,126
2013	58	1,149	7,091	24	134	1,173	7,225
2014	70	1,317	7,905	-	-	1,317	7,905
2015	75	1,472	7,905	-	-	1,472	7,905

Source : Livestock Department - Ministry of Agriculture & Foreign Trade Report

Pork

Table 21 provides data on local pork production. This data is collected by the Veterinary and Livestock Division. This department has the responsibility for inspecting the pork meat at the slaughtering site before it is sold to consumers/wholesalers. This data is considered as a indication of local production of pork. It is also referred to as Pork purchases because it reflects all locally produced pork which is inspected by the Veterinary and Livestock Division before being purchased by consumers/wholesalers.

Local pork production exhibited growth over the period (2011-2015). Pork production rose from 176.8 tonnes in 2011 to 198.6 tonnes in 2015 as more farmers were engaged in pork production to meet domestic demand. Pig farmers continued to be constrained by the high cost of feed which has contributed to increases in cost of production over the years and a reduction in the profitability of pork production. This has limited the growth of the industry and has resulted in the importation of a significant quantity of pork over the years to meet domestic demand, particularly by the hotel sector.

Table 21: Pork Purchases (2011-2015)

Year	Quantity (Tonnes)	Value EC\$'000
2011	176.8	2,279
2012	192.2	2,463
2013	153.5	2,047
2014	178.9	2,399
2015	198.6	2,663

Source: Veterinary and Livestock Department

Sheep, Goat and Cattle

Available data on domestic production meat from sheep, goat and cattle (**Tables 22 and 23**) does not reflect actual domestic production of the above mentioned meats. Actual domestic production of sheep, goat and cattle is grossly underestimated due to the lack of a formal comprehensive data capture system for sheep, goat and cattle. Data is collected by the Veterinary and Livestock Division during wholesomeness inspections of meat (slaughtered, goat and cattle) at the point of sale.

Local producers of cattle, sheep and goat are generally unable to satisfy domestic demand for the above-mentioned meats as a result of inadequate/limited quantities of small ruminants and cattle available domestically. This has resulted in increases in the importation of beef, mutton and chevron over the past few years to satisfy the domestic market.

Table 22: Domestic Production of sheep and goat (Quantity- Tonnes)

Meat	2011	2012	2013	2014	2015
Sheep	0	0	0.048	0	0.044
Goat	0	0.08	0.10	0.079	0.067
Beef	9	16	15	18	21

Source: Veterinary and Livestock Division

Apiculture

Efforts to promote beekeeping as a suitable option for agricultural diversification began with a major push during the period (2011-2015). There was an overall increase in honey

production during this. **Table 23** shows that in 2011, data collected by the Ministry of Agriculture on honey production indicates that 21,000 gallons of honey was produced, increasing to 24,000 gallons in 2015. Accordingly, the number of bee hives increased from 3000 in 2011 to 4,000 hives in 2015. This increase in honey production was primarily driven by the entrance of new Bee-keepers into the sector and an increase in the number of hives by existing beekeepers.

Table 23: Honey Production in St. Lucia (2011-2015)

	2011	2012	2013	2014	2015
Quantity of Honey Produced	21000	22400	16000	14000	24000
Number of Bee Colonies (Hives)	3000	3200	3200	3500	4000

A number of factors have affected honey production over the years. These include vulnerability to the effects of climate change, particularly extended periods of rain/sun resulting in the erratic flowering patterns of nectar producing plants and pest and diseases including the Varroa mite and Chalk Brood. Chalk Brood, a fungal organism surfaced on the island in 2014. A number of beekeepers were slow to respond to the fungal organism which resulted in slow colony development and reduced yields.

Presently, two Honey Producer Organisations exist in St. Lucia. The Mille Fleurs Honey Producers Co-operative and the St. Lucia Association of Beekeepers which comprises 80 percent of honey producers on the island. The members of these organisations produce hive products (honey, pollen, wax) and hive by products such as soap, wine and candles. The activities of the organisations are aimed at promoting the economic and social wellbeing of its members by utilizing their united efforts and funds for the efficient production, processing and marketing of honey and bee products and also the production of hive inputs for members such as frames for bee hives. The European Union via the Banana Accompanying Measures (BAM) project is currently retrofitting and equipping the Honey Processing Facility in La Caye in order to facilitate increased production of honey and other hive products for sale to both the local and export markets.

Based on the forage available for bee pasture on the island, it is estimated that St. Lucia's hive stocking capacity has the potential to accommodate over 100,000 bee hives. Each hive has the potential to produce between six and ten gallons of honey per hive which translates to six hundred thousand to one million gallons of honey. This honey can be sold to niche markets which could fetch a premium price when marketed as naturally produced honey.

It has been estimated that at the current local market wholesale price the industry can earn an estimate US \$33 million to US \$55 million dollars annually. This figure would increase significantly if other hive products such as pollen, wax, propolis, and bees are included.

Value-added products like soaps, candles, and balms, as well as Api-tourism have the potential to generate further revenue when market opportunities for these products are exploited.

Fisheries

Fishing activities form an important part of the socio-economic life of most coastal communities in St. Lucia. Even though fisheries remain small and artisanal throughout the island, it plays a critical role in the food and nutrition security of the country's population. Along with agriculture, both marine and inland fisheries remain vital to the economy of Saint Lucia.

About 70 percent of annual landings are made up of migrating pelagic species namely dolphin, kingfish, tunas which are captured in the December to June season. The remaining 30 percent of the annual landings are comprised of reef and bank species like snappers, groupers and jacks. Conch and sea urchin fishery are also well-established and well-regulated. Most of the fish landed is consumed locally making a significant contribution to national food security.

Table 24 shows that the quantity of fish landed fluctuated over the period 2011-2015. While declines in fish landings of 4.1 and 4.7 percent respectively were recorded in 2013 and 2015, fish landings rose by 0.9 and 3.4 percent respectively in 2012 and 2014. Fish landings declined from 1,693 tonnes in 2011 to 1,616 tonnes in 2015. Tuna and Dolphin were the two major species landed over the five year period. The magnitude of catch/landings continued to be heavily influenced by variability in weather conditions that impacted on the migratory pattern of pelagic species resulting in increases /decreases in the tonnage of fish landed over the period. Increases in the numbers, awareness and use of Fish Aggregating Devices (FAD's) by fishers contributed to increases in the tonnage of fish landed over the period.

The majority of fisherfolk operate on a small scale basis concentrating on mostly primary production, utilizing small boats traps, cast nets and limited technology such as fish aggregate devices (FAD), fiberglass vessels and out board engines.

The bulk of the landed catches are sold locally to retailers/vendors and directly to consumers, and to middlemen or fish traders. The Government of Saint Lucia with the Government of Canada and Japan has invested in several fisheries infrastructure throughout the island. The Fish Marketing Corporation undertakes fish processing, cold storage marketing of fish and fish products.

Data indicates that there is an aging fisher population, while there is a lack of young entrants into the industry. There are a number of reasons for the lack of interest such as the nature of the work, lack of guaranteed earnings, the attraction of land-based occupations and the inability to access credit to establish a small scale business.

Major threats to the industry include exposure to extreme events, including cyclones, floods, and diseases. Following the passage of both hurricanes on the island, persons engaged in the fish sector, encountered a number of problems that caused reduction of the

fishery. The loss of fishing gear mainly fish pots and fish aggregating devices (FADs), created set-backs for many fishers. Small fishers were affected to an extent by the coastal degradation caused by high seas, and large amounts of silt, mud and debris brought down by the rivers and other surface runoff. High rainfall level also increases the runoff of agro-chemicals from agricultural areas into the sea that results in algal bloom with the corresponding growth of algae that kills fish life.

Table 25 provides a summary of the estimated cost of fish landings. The value of Fish landings showed a steady increase over the period 2011-2015 from an estimated EC \$24,798,116 in 2011 to 24,873,840 in 2015.

Table 24: Fish Landings by Species, Quantity and Value, 2011-2015

Type of Fish	Type of Fish (Tonnes)									
	2011r		2012r		2013r		2014		2015	
	Tonne	\$'000	Tonne	\$'000	Tonn	\$'000	Tonn	\$'000	Tonn	\$'000
Tuna	541	7,015	442	6,015	492	7028	385	5573	374	5452
Dolphin	473	7,137	504	7,573	387	6704	407	6830	505	7988
King Fish	197	2,497	151	1,921	148	2050	156	2227	87	1270
Flying Fish	22	147	4	22	107	754	85	618	0	3
Shark/ Black	3	33	11	112	7	83	4	46	4	40
Others	457	7,969	598	9,640	498	9235	659	1086	645	1012
Total	1,693	24,798	1,709	25,28	1,63	25,85	1,695	26,15	1,61	24,87

Source : Fisheries Management Unit, M.O.A

r - revised

Other for 2013 and 2014 also consist of Snapper, Lobster, Conch and Lionfish

Table 25: Estimated Value of Fish Landings (ex-vessel price, EC \$)

Year	2011	2012	2013	2014	2015
Total	\$24,798,116	\$25,283,032	\$25,852,756	\$26,157,162	\$24,873,840

Source: Ministry of Agriculture, Food Production, Fisheries, Cooperatives and Rural Development

Aquaculture

The aquaculture industry is seen as a valuable component of the agricultural diversification thrust. Regarding inland aquaculture the Asian freshwater prawn *Macro brachium rosenbergii* and the Nile tilapia *Oreochromis niloticus* are the two species cultured in St. Lucia.

Aquaculture ponds are usually fed by a continuous flow of pumped freshwater or gravitational flow-through from small streams (the water is often recycled for irrigation). In Coastal aquaculture, the only marine species which has received considerable attention and currently being cultured using a simple technology, is a local strain of sea moss known as GT (*Gracilaria* sp.).

The aquaculture facility and prawn projects established in 1986 contributed positively to the growth of that sector. Concentration has been on the culture of seamoss in coastal waters and tilapia and macrobrachium in fresh water. Assistance from Taiwan in providing a new aquaculture facility at Union has added to the potential to grow the current production of freshwater shrimp and tilapia.

Agro processing

Developing the Agro Processing sector is vital in the drive to add value to the production of non-traditional agricultural produce. Creating such an environment provides an avenue for the creation of job opportunities, as well as agricultural diversification. In 2008/09, the Government of St. Lucia, through the Ministry of Agriculture established the Agro-Processing Plant in Fond Assau, Babonneau, by utilizing an existing structure. This initiative sought to procure equipment that would enable the facility to transform a wide range of locally produced fruits and vegetables by adding value, thus, increasing the level of agricultural production, consumption of locally grown products and increase food security. In order to effectively compete on the international/regional markets, the island needs to meet international quality standards (HACCP). This would require an improvement in the manner in which produce are processed and packaged.

Table 26 provided data on the sales of value-added products at the Fond Assau Agro-Processing Plant over the period (2011-2014). Sales of value-added products by the Fond Assau Agro-processing Plant rose significantly over this period (2011-2014). In 2011, the

facility sold EC\$47,355 of value-added products to the local market including schools, various marketing outlets including Massy Stores, St. Lucia Marketing Board and individual consumers. In 2015, sales increased to EC\$112,836. The demand for products from the facility has grown significantly over the past few years.

Table 26: Sales of value-added products at the Fond Assau Agro-Processing Plant (2011-2014)

Sales (EC\$)			
2011	2012	2013	2014
47,355	81,160.9	92,359.2	112,835.9

N.B- Value added products comprise fruit pulps, fruit juices, fruitcicles, vacuum pack (dasheen, yams, green plantain, green banana), paper made from the banana pseudo stem

To date, the Fond Assau Agro Processing Plant (FAAPP) has been complete and is operational under the direction of the Ministry of Agriculture. The facility commenced operations in February, 2011. From inception, the facility was used as a hub for the purchasing and redistribution of fresh agricultural produce from farmers to the St. Lucia Marketing Board. Production of fruit pulps began on a small scale in October, 2011. In 2012, additional product lines were introduced, including vacuum pack dasheen and yams and paper made from the banana pseudo stem. Fruit pulps and vacuum packed products were produced on a larger scale in 2012 resulting in a 71.4 percent increase in sales during that period. In 2013, the Facility introduced two new product lines which included vacuum packed green bananas and plantains. In 2014, the FAAPP undertook a number of initiatives which further boosted sales in 2014. Sales of juices commenced at the Waterfront in Castries and a new product, fruitcicles was introduced. Two freezers were purchased and placed in the retail outlets of the St. Lucia Marketing Board and the St. Lucia Fish Marketing Corporation to promote the products manufactured at the Facility/increase sales.

The FAAPP has the potential to increase sales significantly to both the local and export market once the necessary equipment is purchased to facilitate increased production of value-added products and international quality standards (HACCP) are met to enable value-added products to penetrate export markets.

1.4 Agricultural Exports and Imports

Food Exports

Table 27 shows the contribution of a selection of agricultural crops to agricultural exports over the period 2011- 2015. Of the identified crops, mangoes, breadfruit and plantains made the greatest contribution to the quantity of commodities exported. It is therefore recommended that future sector diversification initiatives look into the potential for the expansion of the production of these and other commodities.

Exports of agricultural produce more than doubled over the period (2011-2015). Exports of agricultural produce rose from 3,915.6 tonnes, valued at EC\$5.5 million to 7,784.9 tonnes, valued at EC\$10.2 million in 2015. Exports of bananas to the regional market accounted for 75.2 percent of the total tonnage of agricultural produce exported in 2011. In 2015, exports of bananas to the regional market accounted for 86.7 percent of the total tonnage of agricultural produce exported in 2015. Over the five year period, the volume of banana exports to the Caribbean more than doubled, increasing from 2,942.9 tonnes in 2011 to 6,748.9 tonnes in 2015, mainly reflecting a dramatic increase in exports to Barbados and Trinidad and Tobago.

The expansion of exports to the Caribbean region augurs well for the future of the industry as this represents a diversification of the market for bananas and a source of future growth. The industry has benefited from significant investments in the management and control of the Black Sigatoka disease which has contributed to the increase in banana production and exports.

Excluding bananas, exports of non-traditional crops increased over the period 2011-2015. Exports of non-traditional crops rose from 973 tonnes valued at EC\$1.5 million in 2011 to 1,036 tonnes, valued at EC\$2.8 million in 2015. Plantain, breadfruit, mangoes and avocados were the four major crops exported during the five year period. Together these crops accounted for 99.5 percent of the total tonnage of non-traditional crops exported in 2015 and 95 percent of the total tonnage of non-traditional crops exported in 2011. The primary export markets over the five year period (2011-2015) for the four major export crops were Barbados, Antigua, Canada, United Kingdom and the United States.

Based on the exhibited export potential of these commodities it is recommended that future sector diversification initiatives look into the potential for the expansion of the production of these and other commodities.

The Ministry of Agriculture implemented a Rehabilitation of Fruit and Tree crop initiative over the period (2012-2014). This initiative involved the rehabilitation of 100 acres of fruit and tree crops inclusive of breadfruit, mangoes, citrus crops, avocados, cherries and other exotic crops which resulted in increased domestic production of the above-mentioned crops for local consumption and export markets. This initiative also included the expansion of existing tree crop acreages by an additional 25 acres.

Table 27: Comparison of Exports of Selected Agricultural Produce

Produce	2011		2012		2013		2014		2015	
	Tonnes	\$'000	Tonnes	\$'000	Tonnes	\$'000	Tonne	\$'000	Tonnes	\$'000
Avocado	27.66	56.88	22.24	52.84	42.14	112.87	24.24	66.77	16.24	42.52
Grapefruit	42.54	42.82	4.22	4.22	2.42	2.22			2.22	2.22
Mango	27.22	56.24	47.22	74.76	42.22	42.22	67.74	126.22	142.22	222.24
Pineapple	0.10	0.12	-	-	-	-			-	-
Sweet Potato	22.22	42.42	2.44	2.27	-	-			-	-
Breadfruit	452.22	224.24	422.44	424.46	272.44	452.22	242.52	422.22	224.22	422.76
Plantain	445.44	422.47	445.22	424.74	222.27	222.22	522.22	622.45	424.22	522.72
Aroids 1/ Sweet Potato	2.56	2.57	2.42	24.72	2.42	2.74	2.22	5.44	4.22	4.42
Yam	2.27	2.24	4.44	4.22			2.44	22.22	4.46	2.24
Hot Pumpkin	2.22	2.45	2.44	2.24	2.24	2.22	2.27	2.22	2.74	4.22
	2.27	4.54	2.42	64.75	2.22	2.24	2.24	2.22	-	-
	-	-	2.24	2.24	2.22	2.22	4.22	2.22	4.46	2.24
Sub Total	972.74	1,502.0	927.07	1,932.0	832.17	2,468.72	878.40	1,354.22	1,035.9	2,835.5
Banana 3/	2242.22	2222.4	2222.5	2244.24	2222.2	4522.4	2224.2	2225.2	6742.2	7252.22
Total	3,915.6	5,468.1	3,127.6	4,143.4	2,892.9	4,001.2	3,562.2	3,389.2	7,784.8	10,194.2

Source : Foreign Trade Report & MAFF from Customs Documents, Saint Lucia

1 - Aroids here are dasheen, tannia

2 - Total amount of non-traditional crops exported. 3 - Exports to other territories excluding the United Kingdom by

Food Imports

Table 28 provides information on the composition of food imports. Over the past five years the value of food imports have shown an increasing trend reaching a total **EC\$ 363,334,000** in 2014.

The three major contributors to the islands' food import bill continue to be meat and meat preparations, cereal and cereal preparations and fruits and vegetables. Contributing respectively to 22%, 20% and 16 % of the total food import bill.

Total food imports exhibited growth over the period (2010-2014) increasing from EC\$276.5 million in 2010 to EC\$363.3 million in 2014. The composition of food imports remained fairly constant throughout the five-year period. Meat and meat preparations, cereal and cereal preparations, vegetables and fruits and dairy products and eggs were the four major categories of food items imported over the five year period and accounted for 22.1 percent, 20.3 percent, 15.8 percent and 12.8 percent respectively of the total value of food imports in 2014. Meat imports accounted for the largest category of food items imported over the period. Imports of chicken accounted for the largest category of meat imports, followed by pork and beef. The Ministry of Agriculture is currently in the process of putting measures in place to increase the safety net for chicken and pork. Upon completion of the process, it is anticipated that imports of meat, particularly chicken would be reduced. The operationalization of the Meat Processing Facility in the south of the island is expected to result in a further reduction of meat imports.

The Ministry of Agriculture is also currently implementing initiatives geared at reducing the food import bill, particularly for vegetables and fruits through programmes such as the implementation of the Food Production Plan which is geared at increasing domestic production of agricultural produce including vegetables and fruits such as cabbage, lettuce, tomatoes, melons, pineapples which were some of the major vegetables and fruits imported over the period (2011-2015). An import substitution proposal for domestic production of St. Lucia's three major imported crops, namely carrots, onions and white potato have been submitted to the Taiwanese for funding. Selected farmers throughout the island have been identified for domestic production of the above-mentioned import substitution crops. Once this initiative is successfully implemented, a major reduction in the food import bill for vegetables and fruits would be realised.

Table 28: Composition of Food Imports (2010-2014)

Item	2010		2011		2012		2013		2014	
	EC\$'000	%	EC\$'000	%	EC\$'000	%	EC\$'000	%	EC\$'000	%
Live Animals	347	0	276	0	392	0	215	0	0	0
Meat & Meat Preparations	55,850	20	79,086	22	78,971	22	79,015	22	80,211	22
Dairy Products & Eggs	33,606	12	44,172	12	41,887	12	47,885	13	46,471	13
Fish & Fish Preparation	17,961	6	21,619	6	26,251	7	24,642	7	28,391	8
Cereal & Cereal Preparation	50,871	18	69,094	19	70,192	19	76,276	21	73,911	20
Vegetables and Fruits	42,690	15	56,445	16	53,899	15	54,240	15	57,251	16
Sugar Preparation & Honey	12,982	5	19,441	5	21,766	6	15,840	4	16,361	5
Coffee, Tea, Cocoa & Spices	6,992	3	10,321	3	10,843	3	11,007	3	11,781	3
Feeding Stuff for Animals	11,466	4	15,835	4	16,646	5	16,110	4	14,521	4
Miscellaneous Food Preparation	43,752	16	39,170	11	39,320	11	33,350	9	34,401	9
Total	276,525	100	355,457	100	360,167	100	358,506	100	363,301	100

Source : Foreign Trade
 Bureau

Table 29 provides information on meat imports by type. Following two consecutive years of growth in 2011 and 2012, imports of beef declined by 9.0 percent in 2013 and 22.5 percent in 2014. Imports of pork rose over the period (2010-2014), increasing from 586 tonnes in 2010 to 738 tonnes in 2014. Mutton imports declined by 7.2 percent and 32.9 percent in 2011 and 2012 and increased by 7.9 percent and 16.7 percent respectively in 2013 and 2014. Imports of chevron (goat meat) remained fairly constant during the period. The Ministry of Agriculture is currently implementing a Livestock Development Programme which involves the construction of an Artificial Insemination Lab and the importation of higher quality breeds of small ruminants, particularly sheep and goats which would be used for breeding purposes to increase the numbers and quality of the small ruminant population on the island. This programme is intended to increase the availability of mutton and chevron for domestic consumption thus contributing to a reduction in the importation of the above-mentioned meats.

Table 29: Meat Imports by Type and Value (2009-2014)

Year	Beef		Pork		Mutton		Chevron	
	Tonne	EC\$'000	Tonne	EC\$'00	Tonne	EC\$'000	Tonne	EC\$'00
2010	513	10,240	586	3,688	445	5,180	37	288
2011	603	11,291	499	3,716	413	5,795	20	242
2012	708	12,598	614	4,709	277	3,808	41	335
2013	644	12,200	782	5,145	299	3,951	37	372
2014	499	12,741	738	5,652	349	4,920	37	501

Source: Foreign Trade Report

The Meat processing facility will serve as a catalyst for the growth and development of the livestock sector by improving on the marketability of meat and meat products and ultimately resulting in a reduction in the food import bill and increased employment within the sector. The facility is expected to serve as a central marketing and processing facility which will create the marketing network to supply hotels, supermarkets and community based distribution outlets. In addition the facility will ensure food safety issues are adhered to and will allow for more organized livestock disease surveillance and anti-mortem and post mortem inspections.

1.5 Review of Existing Policies and Programmes Affecting the Agricultural Sector

Over the past decade the Government of St Lucia introduced a number of Policies, Strategies and Programmes to promote the diversification of the agricultural sector. It should be noted that most of the policies and programmes developed for the sector, focuses on agricultural diversification, restructuring and social recovery of rural communities in Saint Lucia.

a) The Agricultural Diversification Strategy 2001-2005.

With the uncertainties surrounding the future of the Banana Industry arising from global trade liberalization and successful challenges at the World Trade Organization (WTO) to the banana trading regime of the European Union (EU), the Government of St Lucia, in collaboration with the other governments of the Windward Islands, embarked on a three-pronged strategy to (i) increase the competitiveness of the banana industry, (ii) develop a diversified agricultural sector, and (iii) catalyze the socio-economic transformation of those rural communities that were expected to be adversely impacted by the restructuring of the banana industry

The identified strategic priority were aimed at fostering growth and stability in the agricultural sector by the following avenues:

- Identify and develop alternative sources of income generation;
- Remove the dependence on a single crop for foreign exchange generation;
- Explore and exploit niche markets for non-traditional products;
- Optimize the employment opportunities available within the agricultural sector;
- Increase private sector investment in the sector;
- A key component of the agricultural diversification strategy was the reduction of the country's food import bill.

b) Policy Framework for the Development of the Agricultural Sector, 2004 - 2014.

According to the Policy Framework for the Development of the Agricultural Sector, 2004–2014 The Ministry of Agriculture, Forestry and Fisheries' vision for the agriculture and rural sector was as follows: “to sustain a diversified national agricultural income base and enhance the integrity of rural livelihood systems by generating capacity for efficiency and the competitive production and marketing of agricultural goods and services.”

The following policy objectives were targeted:

- To increase the efficiency and competitiveness of agriculture;

- To promote the adoption of improved/appropriate technology packages;
- To identify and develop alternative sources of income generation;
- To remove the dependence on a single crop for foreign exchange generation;
- To explore and exploit niche markets for non-traditional products; optimise the employment opportunities available within the sector, and increase private sector investment in the sector.
- To enhance the national food security status
- To conserve the natural resource base

c) The Draft Medium Term Development Strategic Plan (MTDSP) 2002-2006.

This Strategic Plan sought to stimulate economic growth and development, and reduce poverty in order to build resilience and competitiveness.

The government's objectives defined in the **Medium Term Development Strategic Plan (MTDSP)** suggested the following areas of intervention:

- To increase productivity in the various sub-sectors – bananas, coconuts, cocoa, non-traditional crops, livestock and fisheries
- To modernize the legislative and regulatory framework in order to provide an enabling economic environment
- To strengthen and further develop supporting institutions, particular farmer's associations to encourage private sector participation in the sector
- To provide adequate support services including: the development of an incentives regime that catalyses diversification, rewards productivity, stimulates entrepreneurship, encourages innovation and supports sound natural resource management practices
- To develop an agricultural credit policy
- To realign the delivery and focus of extension services
- To attract youth and young adults to the sector
- To develop a land use policy to guide land and water management for sustainable natural resource use.

It should be noted that the Priorities and Strategies outlined in the MTDSP were in alignment with the regional and sub-regional objectives and strategies outlined in the *Jagdeo Initiative* and *OECS Strategic Plan of Action*, which are aimed at a diversified agriculture that promotes economic growth, employment and rural prosperity and ensuring food security, within sound natural resource management.

Recognition is given within the Jagdeo Initiative to strengthen the two-way linkages between tourism and agriculture which is of particular interest to the government and people of St. Lucia.

Agriculture and tourism linkages have the potential to be developed in St Lucia, as a strategic alliance to boost production and income generation activities in the rural areas.

Farmers and rural communities would benefit in many ways; for example, from investments in improved infrastructure, training, diversification of rural activities, and ultimately in a more equitable distribution of the benefits of rural resources.

d) National Agricultural Policy 2009 – 2015

The National Agricultural Policy 2009-2015 envisions “ *a vibrant agri-food chain or system that provides adequate supplies of safe, high quality, nutritious food and non-food products and services ,at stable and affordable prices, that assure financial security to producers and is socially and environmentally responsible thereby, promoting development in rural areas and conservation of resources*”

The National Agricultural Policy is designed to achieve seven broad objectives.

- To increase the efficiency and competitiveness of the island’s agriculture.
- To promote the generation, adaptation and adoption of improved and appropriate technology.
- To expand the agricultural production and market base.
- To rationalize the use of land in the country.
- To enhance national food security.
- To generate new opportunities for employment and income generation in rural areas.
- To protect, conserve and ensure sustainable use of natural resource.

e) St Lucia, Medium Term Development Strategic Plan 2012-2016

The Overall Goal defined for the Agriculture Sector as part of the **St Lucia, MTDSP 2012-2016** is for “*A revitalized agricultural sector capable of responding to food security and export development imperatives.*”

The MTDSP identified several Objectives linked to the articulated Goal, these include

- To rehabilitate the agricultural sector, damaged by Hurricane Tomas
- To improve the productive capacity of the agricultural sector
- To improve standards & quality
- To increase the sector’s value added by moving up the value chain

f) National Food and Nutrition Security Policy and Action Plan.

The National Food and Nutrition Security Policy and Action Plan was developed in 2014 by the Government of St Lucia in collaboration with the UN Food and Agriculture Organisation (FAO). This document was considered to be consistent with the Regional Food and Nutrition Security Policy and Plan (RFNSPA) for CARICOM.

Discussions and consultations with key stakeholder points to the fact that in spite of having comprehensive policies and plans to guide the sector, a number of key Objectives and Targets have not been adequately achieved. Some of the areas highlighted include the need for:

- a more competitive non-banana agricultural sub-sector;
- enhanced agri-business enterprises opportunities;
- greater inter-sectoral linkages;
- increased rural incomes and livelihoods, and improved rural communities;
- increased participation of young people in the agricultural sector;
- increased sales of Saint Lucia's agri-exports in the Caribbean markets;
- Increased uptake of technology by farmers and value added producers.

g) Food Production or Value Chain Project

Support to the Development of the Fruits, Vegetables, and Roots and Tubers Value-chains in St. Lucia by Linking Families/Small Farming to Markets. This project is being implemented over the period 2015 to 2017

The project represents a continuation of FAO's aggressive support to the revitalization of the food and agriculture sectors in support of increasing the production and productivity of food in a the agricultural sector and the reduction in the absolute number of Caribbean people suffering from hunger, food insecurity, and malnutrition.

The Objectives of the Project are:

- To increase production and productivity of selected agricultural crops,
- To increase the supply of selected agricultural crops to the domestic market (inclusive of school feeding, correctional facilities, households and the tourist industry)
- To enhance the resilience of the agriculture sector.

The primary beneficiaries are families, small scale farmers and overall all the inhabitants of St. Lucia, since they will benefit significantly from increased small-scale crop production, and healthy and nutritious meals served in the schools, public institutions, hotels and households. In particular, women, youth and the poor and vulnerable populations will be targeted because they are the most adversely affected by malnutrition.

The project was officially launched in September 2015 and a national steering committee was established comprising of personnel from Ministry of Agriculture, Ministry of Health, Ministry of Education and representatives from the agricultural cooperatives.

The project has three main outputs:

- Business models for linking family farms and farmers groups to government food procurement schemes (schools and institutions) and hotels developed, tested and implemented.
- Increased volumes of marketable food produced by family farms, small farmers groups and school gardens.
- Improved nutritional quality of meals served by the school feeding program, government run institutions and selected hotels, utilizing locally produced foods.

h) Development of Coffee Production in Saint Lucia.

Purpose: To increase the profitability of coffee production and to support increased agricultural production and marketing through niche markets, so as to improve the social and economic well-being of the country.

Through its Crop Development Programme, the Ministry of Agriculture is seeking to improve coffee production by undertaking a five-year coffee development programme island wide. The programme will involve the rehabilitation of the existing coffee acreages and the establishment of 150 new acres. Emphasis will be placed on the development of production systems that improve yields, reduce production costs, meet market requirements, reduce soil degradation, conserve water and increase farm profits. Thus, the production system will be developed to help conserve the environment as it will incorporate soil and water conservation measures.

The Objective of the programme is to promote the development of an economically viable and environmentally sound coffee production system through rehabilitation of existing coffee stands, expansion of coffee acreages and appropriate management practices so as to enhance the quantity and quality of coffee beans marketed, and to increase farm income.

Key Outputs:

- Rehabilitation (care and maintenance) of 25 acres of existing coffee farms
- The establishment of 150 new acres of coffee using improved technology (high density planting, inter-cropping) that would increase yields and farm incomes, and effectively manage the environment
- Coffee farm yield improved from <1.00 to ≥ 3.00 metric tonnes per acre
- Enhancing the value added in the coffee industry
- Training of twenty-five (25) participants (mainly women) in the use of small-scale and cost effective modernized technology utilized in coffee bean processing
- Training of (50) participants (farmers, farm-workers) and Extension Staff in the improved technology recommended for coffee production
- Improvement in coffee production. Total production (wet beans) increased to 450 MT/year by 2022
- Functioning of two model coffee demonstration plots/farms

Key Achievements/Outcomes:

- Propagation and maintenance of planting material (10,000 plantlets) for the establishment of coffee plots.
- Assessment and selection of farms for the establishment of coffee plots.
- Dialogue with the Inter-American Institute for Cooperation on Agriculture (IICA) on matters relevant to coffee germplasm development.

i) Poverty Reduction in Saint Lucia through Livestock Development.

The Livestock development project is being implemented with the support of the UNFAO. It is aimed at creating an enabling environment to increase the production of, and market access to, safe quality livestock products through the establishment of appropriate infrastructure, adaptation of relevant technologies and the provision of sustainable support systems.

Objectives:

- Establish the Beausejour Agriculture Station as a national center of excellence, where the appropriate technologies and best practices in livestock production and livestock management can be demonstrated and transferred to clients and stakeholders;
- To improve existing bloodlines of livestock on the island leading to increased production and productivity on livestock farms;
- To provide support for the development of functional and effective livestock producers' organizations;
- To facilitate sustainable livelihood opportunities in the sector through the establishment of strategically located communal production facilities and the establishment of (grass) pastures and forage banks;
- To provide requisite training and capacity building in livestock development and increase the competence and skill of extension officers and livestock farmers.

Key Achievements/Outcomes:

- The farm manager is in place and consultations have commenced with all relevant stakeholders including the Ministry of Infrastructure, the Small Ruminant Cooperative and Invest Saint Lucia.
- A significant quantity of supplies and equipment have been procured.
- A total of 48 sheep and goats of the breeds Virgin Island White (St. Croix sheep), Boer, Anglo-Nubian and Saanen goats, were procured from Illinois, USA and have arrived in Saint Lucia. The breeding and multiplication of these animals at the station for subsequent sale and distribution to small ruminant farmer's island wide is expected to provide a significant boost to the quality and quantity of stock available for improving bloodlines nationally.
- Technicians from the Ministry of Infrastructure have prepared scope of works documents, bills of quantities and costings for supplying labour and for executing the construction of 850 linear meters of eight foot chain link fencing at the perimeter of the northern, eastern and western borders of the farm

- Following consultations with key individuals including the project manager, technical staff of the Veterinary and Livestock Services Division, the Chief Veterinary Officer and four technical members of staff from the Ministry of Infrastructure, draft designs for the construction of a new stockman facility, refurbishment, reconfiguration and expansion of the Beausejour administrative building and the construction of a new Artificial Insemination laboratory, were produced and reviewed

J) Caribbean Fisheries Co-Management Project in Saint Lucia [CARIFICO]; Japan International Co-operation Agency [JICA] funded project.

Objectives:

- Fisheries information required for co-management of target fisheries is collected, organised and updated regularly.
- Mechanisms for consensus building and proper observation of the rules/regulations with regard to co-management of target fisheries are proposed and verified.
- Know-how and technology useful for promoting fisheries co-management is introduced.
- Experiences of the pilot activities are reviewed and lessons learnt are shared in the Caribbean region
- Development of a Basic Fisher Training Course Manual

Key Achievements:

- Fish Aggregating Devices (FADs) deployment – in waters off Anse La Raye, Soufriere, Vieux Fort, Micoud and Gros Islet
- Training of three (3) Fisheries Officers in Japan;
- Development of a FAD Fisheries Manual - manual of best practices in FAD fisheries management
- Development of a Basic Fisher Training Course Manual.

k) Food and Agricultural Organization (FAO) Seamoss Project

The FAO funded seamoss development project is being implemented in three countries, namely Saint Lucia, Kiribati and the Philippines for the period 2015-2018. The project supports the selected countries to provide stakeholders along the seamoss value chain, as well as policymakers and donors with a clear strategy and an action plan on how seamoss production can be developed into a robust, sustainable business that could contribute to socioeconomic and environmental well-being. The current component that is being implemented is for a period of six months and was executed in June 2016 at a cost of US\$50,000.00.

Objectives:

- Facilitate the development of seamoss production and processing through a market driven approach.
- Promoting seamoss production to address social-economic viability and enhanced environmental sustainability.

Expected Results:

- A technical, social, economic, environmental and value chain analysis of the current Seamoss production (*Eucheuma cottoni*) sector in Saint Lucia is conducted including major recommendation for capacity building.
- Seamoss farmers and processors in Saint Lucia are trained on improved seamoss production and processing.
- Maximized social and economic benefits for seamoss producers and processors through promotion of value added seamoss product and services.

l) CARIBSAVE Partnership Seamoss Project

The CARIBSAVE Partnership or Caribbean Fish Sanctuary Partnership Initiative (C-FISH) is implementing a project on behalf of Department for International Development (DFID) through the Caribbean Community Climate Change Centre (CCCCC). The project is geared towards seamoss producers from Aupicon who operate in the Pointe Sable Environmental Protection Area (PSEPA). It includes the following components:

- Education, sensitisation and awareness building (training workshop, preparation of training manual, production of a sensitisation video)
- Provision of tools and equipment for seamoss production (twine, ropes, snorkel, masks, weighing scales, wet suits, boots, etc.)
- More effective marketing of sustainable seamoss production (training, promotional materials, implementation of marketing strategy and action plan, etc.)
- Promotion of efficient and hygienic dehydration of seamoss (solar dryer)
- Provision of a small boat to assist with transportation of farmers and their produce (Fibreglass Reinforced Pirogue (FRP) and engine)

The Caribbean Fish Sanctuary Partnership Initiative (C-FISH) is a 4-year project aimed at strengthening community-based marine protected areas (marine reserves or no-take-zones) by providing resources, training and alternative livelihood opportunities in 5 countries across the Caribbean. C-FISH is funded by DFID and the CCCCC.

Objectives:

- To provide financial and technical support for the management of community-based marine protected areas (MPAs).
- To promote public awareness of the environmental, social and economic benefits that MPAs can generate in Caribbean countries.
- To promote alternative livelihoods in fishing communities and build mutually beneficial linkages between the tourism and fisheries sectors,
- To facilitate stakeholder participation and to monitor the effectiveness of MPA management.

Key Achievements:

- Development of Caribbean Vocational Qualification (CVQ) for Sustainable Seamoss Production.
- Training of seamoss farmers in Aupicon based on CVQ for Sustainable Seamoss Production.
- Startup Input to farmers for Seamoss Production (gear and clothing for farmers, planting ropes, measuring scales, boat and seamoss driers).

Impact:

- CVQ has been approved at the CARICOM Level for use in the training and assessing of seamoss producers at Level 3, in Sustainable Seamoss Production;
- A total of 20 seamoss producers from Aupicon were trained and assessed in accordance to CVQ standards;
- A total of 20 seamoss farmers from Aupicon received start-up materials for seamoss farming including (gear and clothing for farmers, planting ropes, measuring scales, boat and seamoss driers);
- 20 farmers from Aupicon have received training in Business Management, First Aid and seamoss product development;
- Approximately 10 seamoss farmers have been benefiting from the export of dry seamoss to Dominica and Antigua.

Initiatives for 2016/2017:

- Explore new export markets regionally and internationally through a Value Chain Assessment and the development of a marketing plan and strategy;
- Expand local markets to increase production and sale of seamoss;

- Increase the number of persons trained in other coastal communities in accordance with the CVQ for Sustainable Seamos Production;
- Increase the variety of products that can be produced from seamos through product development training.

m) Freshwater Aquaculture Development

Objective:

- To increase the contribution of fish farming to economic growth, food supply, and the income diversification strategy of small scale farmers.

Key Achievements:

- Increase in production of juvenile fish by 5.6 % and juvenile shrimp by 13% over last year;
- Increase in number of aquaculture farmers by 15% over last year;
- 9 schools were visited to undertake public education, awareness and training in aquaculture technology;
- Increase in number of ponds under aquaculture production by 8% over last year
- Completed and distributed Aquaculture Training

Impact:

- No. of farmers benefiting from fish and shrimp: 90 - (these were provided free of charge);
- A total of 102 farmers benefited from technical support from the DOF Staff in 2015-2016;
- Students and schools have benefited from more than 80 lectures delivered by the Staff of DOF as it relates to aquaculture development and technology;
- 6 tours of the union aquaculture facility were conducted with a total of over 300 persons and included farmers, schools and the general public, overseas interests;
- 90 aquaculture farmers have received Aquaculture training conducted by DOF Staff using Aquaculture Training Manual.

n) Fisheries Development Capital Project (Funded by Republic of China and Taiwan ROCT)

The purpose of the project is to develop and implement core regionally recognized training courses based on fisher needs and the demands on the fisheries sector and to implement initiatives within fishing industry to improve its ability withstand the challenges in the regional and global environment in which it operates

Objectives:

- To update and expand the 2006 Plan to Manage the Fisheries of Saint Lucia to include strategic interventions and actions for the sustainable development of fisheries sector, through a participatory planning process.
- To create business and employment opportunities for young people to operate with the national Fisheries Sector through formalized young fisher training schemes.
- To develop a five year operational and business plan for the management and sustainable financing of Fisheries complexes island-wide through participatory planning.

Key Achievements:

- Icebox development project; improve fish handling and quality by constructing iceboxes into fishing vessels;
- Fishers and vendors trained in Seafood Handling and Processing;
- Initiated the Boat Operations and Safety Training;
- Conch Fishers trained in Advanced open water diving and CPR and First Aid;
- Fishers trained in Basic First Aid and distributed First Aid kits;
- Fishers Co-operatives staff were trained in use of accounting software;
- Training of Ministry of Agriculture Staff (2 from DOF, and 1 from Ext and 1 from Methodology and Implementation);

o) Project for Improvement of Fishery Equipment and Machinery in Saint Lucia (Funded by JICA)

The purpose of the project is to facilitate improvement of cooling equipment for five (5) fisheries facilities that were constructed in the past.

Objective:

Replace and or upgrade equipment and machinery at five (5) facilities and introduce such equipment that might contribute to promoting proper fisheries management for the sustainable use of fishery resources.

Key Achievements:

- Converting Ice-making machines from ozone depleting refrigerants to more environmentally friendly refrigerants.
- Construction and Installation of Ice-making Machine in Gros Islet.
- Upgrade for Vieux Fort [SLFMC] and Anse La Raye ice making machines
- Construction and Installation of Solar- Powered Ice-making Machine at Dennery [SLFMC];
- Renovation of cold storage facility at the Saint Lucia Fish Marketing Corporation [SLFMC] at Castries;

- Two Submerged type FADs will be deployed off the west and east coasts of Saint Lucia, respectively.

p) Agricultural Transformation Programme (ATP) of the Banana Accompanying Measures Programme (BAM) 2013-2018.

The overall objective of this EU support is to improve the revenue generating potential of the rural sector and its contribution to economic growth; and to increase productivity of the agricultural sector through entrepreneurship, innovative and technology oriented approaches, agri-enterprise development, and quality standards and certification.

The specific objective of the EU supported BAM Initiative is to:

- Enable the rural population, particularly the youth, to tap into a whole value chain that will generate sustainable livelihoods and create incomes;
- Expand product and market development through an agri-business focus on product enhancement;
- Reduce risk of disasters in the agricultural sector through improved pest and disease management and improved agricultural infrastructure such as roads and drainage; and

Enhance research and technology capability through the provision of diagnostic services to the private and public sectors to complement the new model of agriculture growth.

Key Achievements /Outcomes

Agri-Enterprise Facilitation through market development and Agro-processing in order to leverage an expansion of the value chain from production enhancement, product development, and market development needs.

Research and Technology Facilitation through the enhancement of the local research and technology capability supported by a National Diagnostic Facility.

Disaster Risk Reduction in Agriculture facilitated by the on-going management of Black Sigatoka disease and the rehabilitation of farm community infrastructure.

Agro-Enterprise for Youth through the creation of an enabling environment that assures the entry of a cadre of 150 young entrepreneurs in agriculture.

q) Consolidated Foods Limited (CFL) Farmer Certification Programme.

Over the last five years Consolidated Foods Limited (CFL) has played a meaningful role in boosting agricultural production in St. Lucia. Starting in 2010 CFL'S Farmer Programme has provided tangible incentives to producers of fruits, vegetables, roots and tubers, condiments and livestock products in boosting their level of production through CFL's interest free loan programme to farmers coupled with a guaranteed market for their

produce. During the period hundreds of farmers have benefited from the programme while the volume of CFL's purchases from local farmers has more than doubled.

A unique feature of CFL's Farmer Programme is the provision of interest free loans, which over the five year period has recorded a ten-fold expansion to reach in excess of \$500,000. Farmers are granted a three month grace period and repayment of the loan is made from the proceeds of their sale to CFL. This feature of the programme was significant in resolving the perennial problem of lack of access to affordable financing to farmers from the traditional sources of credit.

CFL, in collaboration with a number of other institutions has also undertaken the cultivation of new crops in Saint Lucia. To this end, they have worked with the Ministry of Agriculture in developing a half-acre demonstration plot for white potatoes in Fond St. Jacques which has proven to be an enormous success resulting in the cultivation of over one tonne of white potatoes. With the support of World University Services of Canada and in collaboration with the Ministry of Agriculture and other agencies, a study tour was conducted in Jamaica aimed at expanding the production of white potatoes and other roots and tubers in St. Lucia.

The company was also effective in collaborating with local farmers in increasing the volume of cultivation of sweet cassava from 638 kilos in 2014 to 5.5 tonnes in 2015, more than eight fold increase in production. Efforts are on the way to increase the usage of cassava, converting it into flour and other products.

Partly as a result of the Farmer Certification Programme, supermarket purchases of pawpaw, honeydew, sweet potato and tomato have increased by more than 50 percent in 2015. In recognition of the need to build a healthier nation, and also to reduce Saint Lucia's food import bill, CFL is actively encouraging farmers to significantly expand their production of crops such as Kale, Collard greens, Swiss Chard, Spinach and Cayenne pepper.

In addition to crops CFL has achieved enormous success in working with local producers in developing the domestic market for livestock products. To this end, sales of locally produced chicken have grown significantly in recent years while production of locally produced pork, goat and rabbit meats has increased while tilapia production has also seen appreciable increases.

r) The Fruit and Vegetable Demonstration and Extension Cooperation Project

In July 2016 The Government of Saint Lucia signed an action plan that will signal the beginning of Phase II of the Fruit and Vegetable Demonstration and Extension Cooperation Project.

The project is a collaboration between the Government of Saint Lucia and the Government of the Republic of China (Taiwan), and is designed to improve on the quality and quantity of selected fruits and vegetables for the domestic market.

Phase II of the project will focus on banana farmers who do not wish to continue supplying bananas to the European market. These farmers will cultivate crops such as watermelon, cantaloupe, papaya, pineapple, tomato, sweet pepper, cabbage, lettuce and cucumber. The project will also focus on the introduction of new crop varieties and the adaptation of improved technologies that will increase revenue while diversifying the agriculture sector.

During the first phase of the project, the following objectives were met: the establishment of three demonstration plots to showcase the cultivation of new crops and the use of improved varieties; the hosting of 19 training workshops and five farmer field school sessions to help build capacity among cultivators of new crops (these capacity building exercises benefited approximately 1045 producers); the training of 11 agricultural officers in the transfer of relevant technologies; the building of nine compost houses to demonstrate the making and use of compost; and expansion in the cultivation of selected crops

s) Poverty Reduction in St. Lucia through Livestock Development (India, Brazil, South Africa Thrust Fund in Collaboration with FAO)

This is a recently commenced project that is aimed at creating an enabling environment to increase the production of, and market access to, safe quality livestock products through the establishment of appropriate infrastructure, adaptation of relevant technologies and the provision of sustainable support systems.

The project will establish the Beausejour Agriculture Station (BAS) as a National Centre of Excellence through infrastructure improvement and the breeding and multiplication of quality animals to enhance the breeding programmes of livestock farmers in St Lucia. It will also focus on the training of livestock farmers and the transfer of technology and innovation to enable farmers to become more productive and to build sustainability of their enterprises.

Complimentary activities will include the establishment of strategically located communal production facilities and the rehabilitation and establishment of pastures and fodder banks for livestock nutrition and feeding.

For sustainability the livestock farmers' organizations will be strengthened and the technical and managerial capacity, competencies and skills of extension officers, veterinarians and livestock farmers will be improved.

A number of activities have commenced as a result of the implementation of this Livestock Development Initiative. These include:

- Consultations have commenced with all relevant stakeholders including the Ministry of Infrastructure, the Small Ruminant Cooperative and Invest Saint Lucia
- Procurement of material and equipment and Technical expertise;
- Semen of breeds of goats, cattle and pigs for performing artificial insemination on local farmers' holdings;

- A total of 48 sheep and goats of the breeds Virgin Island White (St. Croix sheep), Boer, Anglo-Nubian and Saanen goats, were procured from Illinois, USA and have arrived in Saint Lucia;
- Draft designs for the construction of a new stockman facility, refurbishment, reconfiguration and expansion of the Beausejour administrative building and the construction of a new Artificial Insemination laboratory, were produced and reviewed;

t) Disaster Vulnerability Reduction Project

This project was begun in 2014 as a partnership between the Government of Saint Lucia, the World Bank Group, and the Climate Investment Funds. The project will be implemented over the course of five years, and will receive US \$27 million in funding. Direct beneficiaries of the project will encompass the entire population of Saint Lucia, as the project's main objective is to improve capacity building at the national level. Additionally, the project will reduce the risk of key infrastructure failure, and improve the national understanding of risk for informed decision-making.

Five outcomes are associated with the project:

1. Infrastructure improvements for the purpose of reducing flood and landslide risks. These will take the form of flood control infrastructure, road improvements, retrofits of emergency shelters, rehabilitation of water supply infrastructure, and retrofit of schools and health centers.
2. Technical assistance for improved application of disaster and climate risk information. New data will be collected, including flood and erosion mapping, and monitoring networks will be established.
3. A climate adaptation financing facility will be created for provision of a means of pre-emptive climate adaptation for Saint Lucian households. The Saint Lucian Development Bank will serve as the primary lender, and other retail banks will later be added. This component will emphasize equitable provision of financing across all socio-economic and gender groups.
4. An emergency fund will be established to allow for rapid response and re-allocation of project financing in the case of an emergency.
5. Project management and implementation support will ensure sustainability through provision of technical advisory services, staff training, operating costs and acquisition of goods.

6. Agricultural Sector Institutions and Governance

The **Vision** of the Ministry of Agriculture, Fisheries, Physical Planning, Natural Resources and Co-operative is to create a...*Vibrant, Service-oriented, Stakeholder Focused, and environmentally responsible Organization facilitating integrated services aligned to a dynamic Food and Agriculture system.*

Within the context of the change of Government towards the end of the first half of 2016, Cabinet by Conclusion No. 14 of July 06, 2016, approved the establishment of new Departments in the Public Service as detailed below:

The Ministry of Agriculture, Fisheries, Physical Planning, Natural Resources and Cooperatives is now comprised of the following two Departments:

1. ***The Department of Agriculture, Fisheries, Natural Resources and Cooperatives:*** Policy, Planning and Administrative, Marketing, Crop Development, Livestock Development, Information Management, Cooperatives, Forest and Land Resources Development, Water Resources Management, Fisheries
2. ***Department of Physical Planning-*** Policy, Planning and Administrative Services, Land Administration, Planning

Figure 6 presents an Organogram showing the Divisions within the Department of Agriculture, Fisheries, Natural Resources and Co-operative.

It should be note that Water Resource Management Agency and Forest and Land Resources Development falls under the Department for Natural Resources

Department of Agriculture

The Department of Agriculture plays a significant role in the growth and development of the Agricultural Sector. The Department's major component is in the provision of technical support, and advisory and regulatory services. The Department of Agriculture comprises of five (5) Divisions under the supervision of the Director of Agricultural Services and aided by a Deputy Director (**See Figure 7**). The five Divisions include the Veterinary and Livestock Services Division, Propagation and Tissue Culture, Agricultural Engineering Services Division, Agricultural Extension Service Division and the Research Division. Each of these Divisions is headed by a senior technical staff.

The central objective of the *Veterinary and Livestock Services Division* is to increase livestock production, productivity and livestock product marketability, through the provision of effective animal health, animal production, quarantine and veterinary public health services. This objective is accomplished by putting the following in place:

- Providing farmers with improved genetic stock to facilitate improved blood lines.
- Monitoring stock health by the routine farm visits, minimizing possibilities of disease outbreak and controlling disease problems in the shortest time span.
- Monitoring production levels.

- Protecting animal population from foreign animal diseases by implementing regulatory and quarantine services.
- Protecting public health through inspection of animals destined for slaughter and their products.

The role of the *Propagation and Tissue Culture Division* is to provide support service to the Agricultural Sector and the general public in the supply of disease free plant germplasm. The function of the Division is to:

- Provide plant germplasm (fruit, vegetable, food species, cut flower and ornamental germplasm).
- Provide new and elite material to improve production base.
- Identify and multiply threatened and endangered plant species in the conservation of floral biodiversity.
- Establishment and maintenance of existing germplasm bank – for active collection.

The principal objective of the *Agricultural Engineering Services Division* is to provide efficient and timely support services that will improve land and water management practices and encourage the use of appropriate technologies in agriculture within the agrarian community and other related agencies that seek to contribute to the attainment of food security and the continuous improvement of the nation's nutritional status and sustainable management of its natural resources.

This objective is realized through the provision of timely and competent technical and professional services and advice to the farming community, relevant ministerial and other governmental agencies in the relevant primary disciplines of Agricultural Engineering through Soil and Water Resource Development, Irrigation and Drainage, Drainage and Land Improvement, Mechanization and Appropriate Technology Development - all of which must be exercised with the purpose of increasing productivity and efficiency in the utilization of resources in a manner that is socially, environmentally and economically sustainable.

The main purpose of the *Extension Division* is to improve the quality of life and increase the standard of living of farmers, rural folk and the local people through agricultural educational and advisory services. The Division is led by a Chief Extension Officer (CEO), followed by eight Regional Heads and Subject Matter Specialist. The eight Regional Heads are each given managerial and supervisory responsibilities and roles of a region. The island of St Lucia is divided into eight regions. Each region has a team of Agricultural Assistants that perform most of the farm advisory frontline and fieldwork.

The Principle objective of *Research Division* are:

- To minimize the risk of transfer of exotic plant pests and diseases (into and out of Saint Lucia) in the conduct of trade
- To minimize adverse effects on the quality of crop yields through the management of endemic populations of plant pest and disease organisms.
- To assist the agricultural sector with technical expertise, in the areas of crop agronomic and husbandry practices, post-harvest technology, agro-processing, soil and plant tissue diagnostics.

- To manage agrochemicals and toxic chemicals in an environmentally friendly manner for sustainable development.

Department of Fisheries

The Department of Fisheries is guided by the provisions of the Fisheries Act 10 of 1984, Chapter 7.15 of the Revised Laws of Saint Lucia 2008. The mandate of the Department is to promote fisheries, which includes fresh and marine aquaculture resources so as to ensure the optimum utilization of the fisheries resources for the benefit of Saint Lucia. The promotion of fisheries is guided by a plan for the fisheries management and development which is prepared on the principles of maintaining the ecosystem's capacity to support productive fisheries for multiple generations, strengthening food security and optimizing economic benefits through and the collaborative management and development of fisheries with fisheries resource users.

As per the draft Fisheries Plan 2013 – 2023, the strategic goal of the Department is to foster medium to long term economic prosperity in the fisheries sector through the promotion of sustainable fisheries and effective fishing techniques that will result in fishers and fish farmers meeting and exceeding national wage standards while maximizing the potential long term economic value of the available aquatic resources to the people of Saint Lucia

Department of Natural Resources

Water Resource Management Agency

The Water Resource Management Agency (WRMA) was established by the Water and Sewerage Act Cap 9.03 and is responsible for the management of the Water Resources of Saint Lucia. The responsibilities of the Agency include; receiving and considering applications for abstraction licenses, permits for use of water in Water Control Areas, permits for discharge of water in Waste Control Areas and making recommendations to the Minister for approval of such applications. The Agency also maintains a database of information related to water resources management and is mandated to develop watershed management plans and to facilitate regulation accordingly. The promotion of the sustainability of water resources as well as the conduct of public awareness on the use and management of water resources are important activities that are being undertaken by the Agency.

Some of the additional key functions of the Agency are; undertaking water resources assessments and planning including surveying, monitoring, research and development, and providing advice on the conservation and use of water resources. The WRMA manages and maintains a network of hydro-meteorological equipment throughout the island in collaboration with the Saint Lucia Meteorological Services and conducts stream gauging activities within the main watersheds of the island on a regular basis towards prudent management of water resources.

Forestry and Land Resource Development

The Forestry Department is a department of the Ministry of Agriculture, Fisheries, Physical Planning, Natural Resources and Cooperatives and reports directly to the Permanent

Secretary (PS) within the Ministry. The Forestry Department was transferred back to the Ministry of Agriculture in June 2016, after being transferred to the Ministry of Sustainable Development, Energy, Science and Technology in 2011. It is the official body responsible for direct management of Saint Lucia's Forest Reserves, for oversight of the management of all forests in Saint Lucia, and for the protection and management of Saint Lucia's terrestrial wildlife. An internal institutional assessment of the Forestry Department conducted in 2014 identified a number of important issues, summarised as follows; the Department has a commendable tradition and record of forest protection and natural resource management in Saint Lucia. This is well recognised and respected across the country.

The Department is undergoing a challenging period of change. Whereas its original purpose and prevailing strategic approach revolved around forest protection and production, its actual role is more complex, encompassing the conservation of rare and endangered species, sustainable rural development, disaster prevention and mitigation, provision of tourism and recreation opportunities, and maintenance of essential ecosystem services, vital for the continued social and economic well-being of the country.

Department of Co-operatives

The principle objective of the Department of Co-operatives is to facilitate the development of the co-operatives sector and its members through education, the establishment of policies and guidelines and the provision of a regulatory environment to facilitate the development of the sector.

The Mission of the Department of Co-operatives is "to effectively create, implement, monitor and regulate environmentally friendly programmes, projects and strategic initiatives with assistance from the relevant stakeholders, needed to ensure a profitable, sustainable and enterprising non-financial cooperative sector in St. Lucia.

Objectives:

To facilitate the development of the co-operatives sector and its members through education, the establishment of policies and guidelines, and the provision of a regulatory environment to facilitate the development of the sector.

Mandate

1. Creation of synergies among stakeholders aimed at building capacity within the agricultural, fishing, producer co-operative.
2. Transform the image of the department into a more professional provider of regulatory services.
3. Facilitate the organization of national/secondary bodies for co-operatives.
4. Facilitate the education/training of co-operatives personnel to improve safety and soundness.
5. To improve the productivity and efficiency with which the regulatory/supervisory function is executed.
6. Promote the co-op business model as the ideal for poverty alleviation, job creation and revitalization of inactive societies by March 2017.

Main area of focus of the Department of Co-operatives are:

- Capacity building and strengthening of farmers and fisher organisations
- Rural development linkages with Co-operatives
- Rehabilitation and upgrading of all co-operatives

Programmes/Activities:

- Address the principle training deficiencies identified in co-operatives in relation to governance, business operations, role functions, responsibilities of members and committee members.
- Assist in attaining the minimum operational and performance standards for producers and service co-operatives.
- Assist Co-operatives to develop appreciate and recognize the importance of compliance.

Figure 6: Organogram Showing the Key Divisions within the *Ministry of Agriculture, Fisheries, Natural Resources and Co-operative*

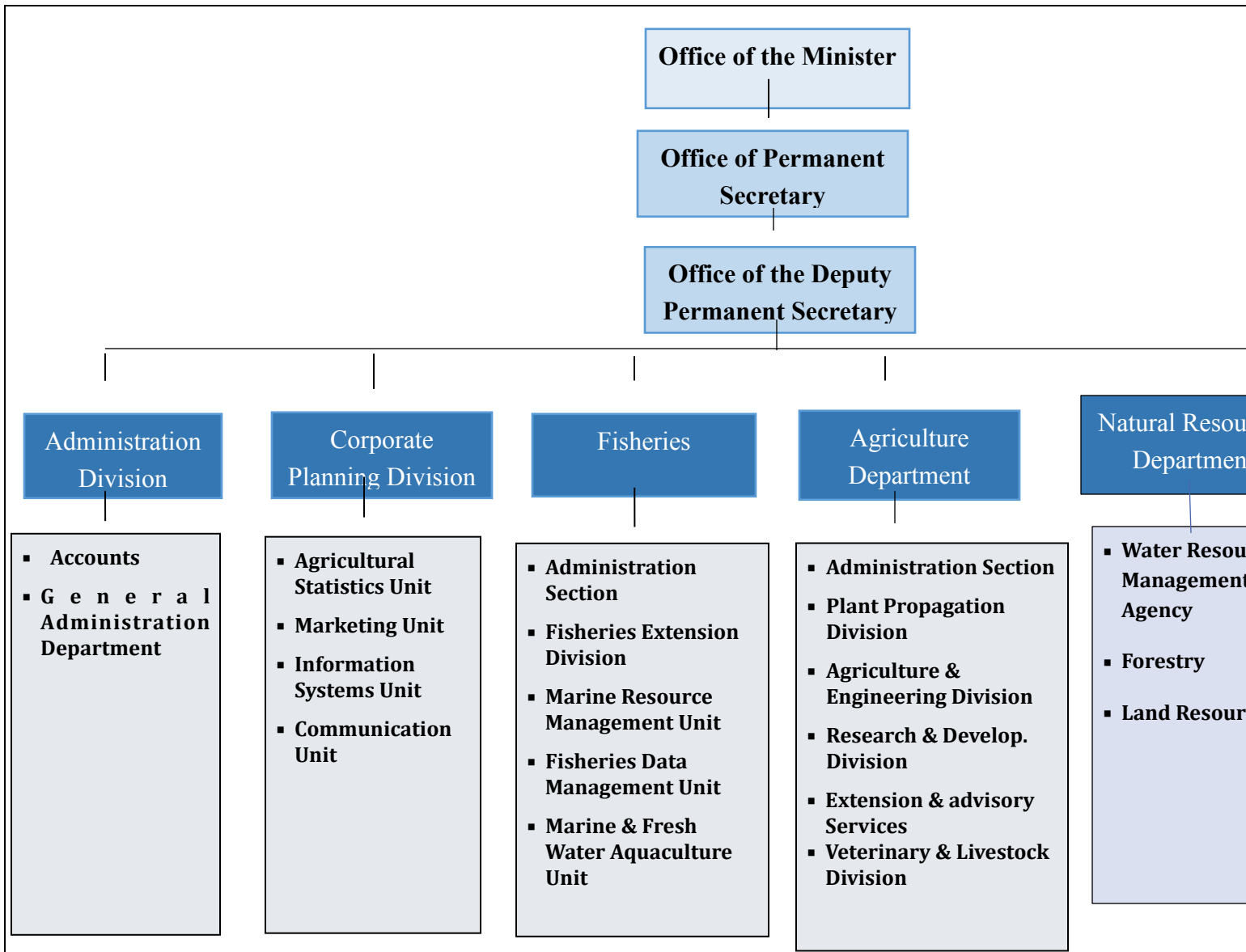
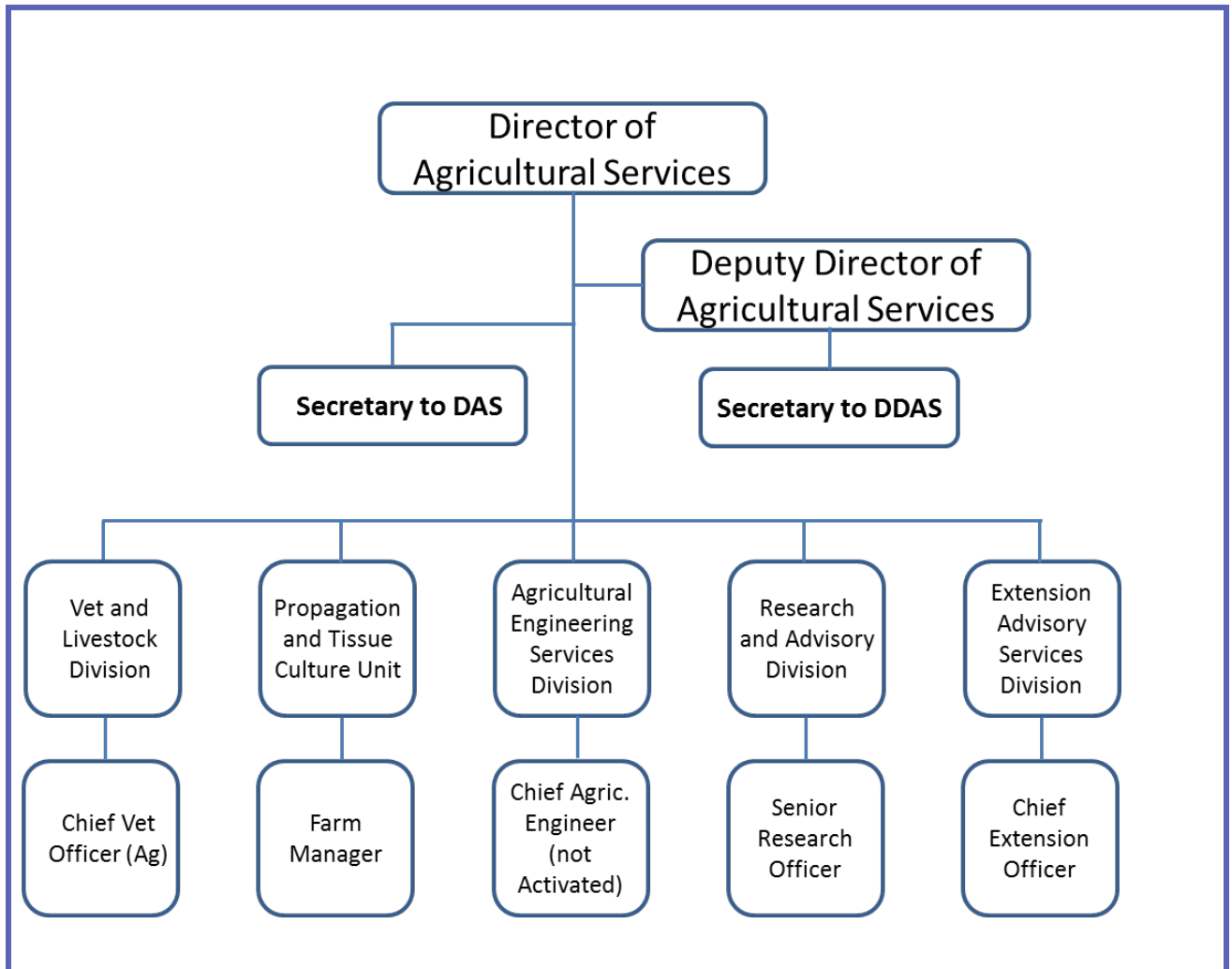


Figure 7: Organogram of Division of Agriculture



Strengths and Weaknesses of the Ministry of Agriculture, Fisheries, Physical Planning, Natural Resources and Co-operative

Strengths

- The Ministry has a cadre of qualified and capable technicians. Several staff members are adequately trained in technical themes and disciplines to provide relevant technical support to the farming community.
- The Ministry has many senior/experienced technical staff members who have a good understanding of their particular role within their Department and Ministry who possess sound vision and leadership to implement government's policy for the Agricultural sector and to facilitate dialogue and consensus building among key stakeholders and partners of the Ministry of Agriculture.
- Good collaborative mechanisms with affiliated institutions such as the St. Lucia Marketing Board, St. Lucia Fish Marketing Corporation, Agro-processing Facility , Farmer and Fisher cooperatives, WINFRESH

Weaknesses

- Lack of a clear policy direction- The Ministry has difficulties defining its priority areas for action
- Poor planning within the Ministry of Agriculture. Planning is ineffective because it does not reflect clear priorities and targets to be achieved.
- Lack of succession planning – Several key personnel have a few years before retirement and this will affect the managerial and technical capacity of the Ministry in the near future.
- Poor monitoring and evaluation of the Ministry's activities- Lack of relevant performance indicators
- Poor communication between senior management and junior staff
- Unstable leadership- Changes in Ministers and Permanent Secretaries in the last ten years
- Weak managerial capacity- Very few managerial personnel have adequate management training to discharge their responsibilities

In recent years, the Ministry has adopted a strategy that can be described as participatory, in which it collaborates with a large number of public and non-public institutions to dialogue and discuss issues that affect the sector. This approach has not been a consistent one and the extent to which it has been successful depends on the particular issues or themes discussed and the level of stakeholder involvement.

The Ministry of Agriculture, Fisheries, Physical Planning, Natural Resources and Co-operatives also collaborates with a diverse group of stakeholders both within and outside the sector on the implementation of the government's programs and projects in the sector.

These include various entities in the public sector, the banana sub-sector, producers' groups, financing institutions, trade and marketing enterprises, service companies, NGOs, etc., as well as various regional and international bilateral and multilateral institutions that provide development support and technical assistance to the country's agriculture. Its range of responsibilities in the sector as well as in the wider public sector as a coordinator, facilitator, etc. is reflected in the large number of committees, working groups, etc. in which it is involved.

Other Affiliated Institutions

The St. Lucia Marketing Board

The St. Lucia Marketing Board was established by an Act of Parliament in 1967 to carry out the following functions:

- To stimulate, facilitate and improve the production, marketing and processing of produce;
- To secure the most favorable arrangements for the purchase, handling, transportation, storage, exportation, shipping, marketing and sale of produce whether in the island or out of the island;

Challenges facing the SLMB

- The marketing board is seen as a Market of last resort by farmers;
- The physical facilities of main structure are old, deteriorating and costly to maintain;
- export marketing being represented by less than 2% overall business activity;
- wholesale distribution function of both local and imported agricultural products represented by 40%-45% of overall business activity;
- retail distribution function of both local and imported agricultural products represented by about 50%-55%;
- the SLMB, because of its critical liquidity, financial position which render it unable to purchase adequate available quantities of produce from the farmers, it is unable to provide a reliable source of supply of produce to hotels, supermarkets and the general public at its retail outlet. As a result of this situation, farmers seek to directly sell their produce that the SLMB could not purchase, to other retailers and ultimate users of the produce. The ability of the SLMB to stimulate agricultural production is minimized;
- not being able to facilitate meaningful import substitution;
- the SLMB operating with limited resources, aging physical plant, limited financial assistance from government and inadequate human resources;
- Board of Directors change as the government changes: lack of stable strategic management.

In addition to the above-mentioned challenges, the SLMB is plagued with a number of structural problems including limited product lines offered on the overseas market, weak production and supply platform, poor quality packaging material, high cost of freight, particularly air freight, high variance in grades and standards for various markets. These structural problems must be addressed to enable the SLMB to play a more meaningful role in the development of the non-banana agriculture sector in St. Lucia.

The SLMB was charged with the duty of promoting the proper and effective marketing of non-banana agricultural produce. This institution has not fulfilled its mandate and has incurred losses over the years. Several players have entered the market providing superior services, thus defeating the key purpose of the SLMB of providing a guaranteed market to local farmers. Under current conditions, the SLMB cannot guarantee the successful marketing of non-banana agriculture and must therefore be restructured. The relatively weak financial position of the SLMB has limited its ability to aggressively undertake a restructuring plan. Policy makers must decide on the best possible option of handling the accumulated debt of SLMB in order to facilitate the restructuring process to enable the SLMB to be the premier marketing organisation for the promotion of non-banana agriculture.

The St Lucia Fish Marketing Corporation

The St. Lucia Fish Marketing Corporation (SLFMC) was established in 1985, providing local fishermen with processing, storage, and marketing facilities, enabling St. Lucia to become self-sufficient in fresh fish production. The goal of the St. Lucia Fish Marketing Corporation was to stimulate the growth and development of the Fisheries Sector by providing fresh and high quality local fish products, on a consistent basis, to all market segments, by way of the effective and efficient marketing and promotion of fisheries products and by-products, thereby contributing to fish sector income growth and facilitating reduction in the balance of trade deficit.

The company has been in existence for 26 years during which it purchased and continues to purchase fish from local fishers, process, and retail the product to the hotels, restaurants and the general public. Currently, the operations of SLFMC, with its 40 employees, are limited to processing and retailing of landed fish. Processing was initially carried out in its Castries plant until the Vieux Fort plant was commissioned in 2003. Processing is now undertaken at its Vieux Fort Plant. The marketing and sale of fish, both landings and imported, generates revenue for the Corporation. However, the Corporation has historically made losses from the processing of local catches of fish components of its operations which has been subsidized by the sale of imported seafood. The fortunes of the Corporation have been at best dismal, with losses being recorded for all but 4 of the 26 years of operations. Overall, the most profound setback has been the inability of the Corporation to influence the prices it pays to fishers and pass on that cost to its clientele.

Challenges facing the St. Lucia Fish Marketing Corporation (SLFMC)

- The SLFMC is confronted by endemic financial losses whilst current statutory obligations of fish purchase from local fishermen remain in force. The SLFMC is obligated to purchase whatever fish is sold to them by local fishermen.
- Financial constraints have limited the Corporation's ability to pay fishermen promptly. This has resulted in fishermen choosing alternative means of selling landed fish such as selling directly to consumers via the roadside, middle-men who purchase from fishermen to sell to hotels, restaurants, supermarkets and other sea food businesses.
- Inadequate traceability of fish products through all stages of production, processing, distribution, transport and retail to the consumer
- Lack of a strong identifiable brand.
- The SFMC is seen as a market of last resort by fishers –Many fishermen sell premium catch to middle-men and other purchasers and only sell what cannot be sold to SLFMC.
- The SLFMC is not HACCP compliant. This limits the Corporation's ability to penetrate lucrative export markets
- Inadequate practices by fishermen regarding fresh fish handling, transport, storage and distribution resulting in unwholesomeness of local fish products being sold to the SLFMC. Many fishermen are unwilling to purchase ice for preserving fish on their fishing vessels which compromises the quality of the landed fish.

These challenges have resulted in relatively high costs of production, processing, handling and storage of fish resulting in financial losses. Recently, the development and promotion of new value-added products and increased sales of traditionally slow moving species as a result of aggressive promotion campaigns by the SLFMC has resulted in increases in revenue. However, restructuring of the SLFMC would be necessary to increase the efficiency and competitiveness of the Corporation. The restructuring process must entail a review of the current statutory obligations of the SLFMC which has hindered the operational efficiency and profitability of SLFMC.

PART TWO
POLICY FRAMEWORK AND AGRICULTURE SECTOR
STRATEGY

2. POLICY FRAMEWORK

Introduction

Agricultural Policies consist of Governments' decisions that impacts the growth and development of the Agricultural sector. In others words, Policies are the instruments of action that governments employ to effect change. For example Price related Policies can influence the level and stability of input and output prices and therefore agricultural production costs and revenues. Policies can also impact public investments and allocation of budgetary resources in agricultural research to develop new technologies, in infrastructure development and in specific agricultural projects to increase productive capacity. Policy decisions can also be made with regards to education and training to upgrade the human capital in the sector.

A Policy Framework describes an overall strategic approach, identifying the desired future and setting out what needs to be achieved in order to bring about change. An Agricultural Policy Framework provides information on Policy Goals, and associated Strategic and Specific Objectives for addressing the critical Agricultural Development challenges and realising the available opportunities of a country.

The Policy Framework would also identify specific Policy Instruments or Tools that would be aimed at achieving the Strategic Objectives. Policy instruments/Tools are interventions made by government/public authorities which are intended to achieve outcomes which conform to the objectives of Public Policy.

2.1 Policy Design

Based on the analysis of challenges and opportunities and the review of existing Policies and Strategies, articulated in **Part 1**, a number of Key **Priority Areas** have been identified that would form the basis for the development of the Agricultural Policy Framework and Strategy for St. Lucia (2016-2021).

These **Priority Areas** are:

1. Agriculture Diversification- based on improved Research and Development and utilization of improved technologies;
2. Resuscitation of the Banana Industry
3. Enhance National Food and Nutrition Security;
4. Reduction in the Food Import Bill;
5. Agro processing and Agribusiness Development;
6. Market Development- Domestic and Export;

7. The development and strengthening of appropriate institutional structures, mechanisms and human resource capacities within the Sector Institutions, including the linkages and partnerships (Local, Regional and International).
8. Increased youth and women involvement in agriculture;
9. Effective management and utilisation of Fisheries resources.
10. The protection, conservation and sustainable utilization of natural resource (Land, Water and Forestry);
11. Disaster Risk Reduction and Climate Change Adaptation

The information provided in **Table 30** shows the links between the identified Priority Areas and the articulated Challenges and Opportunities.

Table 30: Matrix showing linkages between Priority Areas, Challenges and Opportunities

#	Priority Areas	Challenges	Opportunities
1.	<p><i>Agriculture Diversification-based on improved Research and Development and utilization of improved technologies.</i></p>	<ul style="list-style-type: none"> • Inadequate Research and Development systems and structures, including adequately trained personnel - agriculture extension. • The need for the use of improved technologies in agriculture (e.g. Climate Smart Agriculture; Greenhouse technology development; Water Storage/Irrigation development. • Inadequate farm management practices and insufficient attention given to crop cultivation utilizing sustainable ecological and environmentally friendly management practices. • Predominance of small-scale/ subsistence production, which has a negative impact on output and Cost of Production. • Difficulty in attracting farm labour at the offered wage rate in an economy which is increasingly service-based. • The problems of inconsistencies in supply and quality of vegetables need to be addressed in order to boost local demand. 	<ul style="list-style-type: none"> • Declining Banana Industry offers opportunities for non-banana crop production (coconuts, cocoa, herbs and spices etc.); • Rapidly growing tourism sector offers opportunities for the expansion of local market for a variety of fresh and processed agricultural products. • Presence of unexploited niche markets e.g. organic agricultural products such as coffee. • Increasing/Growing health conscious population with a strong preference for locally grown fresh produce • Successful composting and integrated crop management could motivate farmers to venture further towards organic agricultural production. • Integration of OECS, CSME opening possibilities for expansion of market opportunities/attracting farm labourers from within the region (particularly from countries with lower wage rates such as Guyana) • Recent diversification thrust has resulted in the creation of an enabling environment for farmers to increase the production of non-banana crops with export potential such as

#	Priority Areas	Challenges	Opportunities
2.	<i>Resuscitation of the Banana Industry</i>	<ul style="list-style-type: none"> • Competition from Central American banana production 	<ul style="list-style-type: none"> • Reliable shipping arrangements for exporting produce to the European market, particularly the UK. • The UK market has a
3.	<i>Enhance National Food and Nutrition Security</i>	<ul style="list-style-type: none"> • Heavy dependence on food imports • Chronic Non-communicable Diseases continue to be a huge burden on the health system in St. Lucia • There is a shift away from traditional diets made up primarily of locally produced whole root, tubers, and vegetables to more varied energy-dense diets based on more 	<ul style="list-style-type: none"> • • The implementation of the food production and action plan creates tremendous opportunities for enhancing food and nutrition security and reducing the food import bill.

#	Priority Areas	Challenges	Opportunities
4.	<i>Reduction in the Food Import Bill;</i>	<ul style="list-style-type: none"> • Low domestic agricultural output due to inadequate production practices and the lack of integrated production and marketing mechanisms. • Inadequate support provided to farmers to tackle high cost of inputs, pest and disease management, and recovery after natural disasters such as storms, hurricanes. • Inefficiencies in the implementation of the Crop Monitoring Programme. (The Ministry of Agriculture has in place a Crop Monitoring Programme which is meant to limit imports to only the amount required when gaps occur in local supply. It is regarded as being ineffective as data collected for local production forecasts is not used to determine the timing and quantum of imports. 	<ul style="list-style-type: none"> • High/increasing demand for agricultural produce due to advances in the country's tourism sector; • The Agricultural sector has been targeted as one of the engines to stimulate local food production and to address the high food import bill. Initiatives such as the Value Chain Project, and the Fruit and Vegetables Extension project, currently being implemented by the Ministry of Agriculture is anticipated to increase the volumes of domestically produced fruits, vegetables and roots and tubers resulting in a reduction in the food import bill . • There exist a demand for very high quality and assured supply of agricultural produce for hotels that currently rely to a great extent on imports, but would prefer to source locally.

#	Priority Areas	Challenges	Opportunities
5.	<i>Agro processing and Agribusiness Development;</i>	<ul style="list-style-type: none"> • There are several structural issues that must be addressed if agro processing is to thrive in St Lucia. Some of these are: <ul style="list-style-type: none"> - Poor operational/organisational and financial management; - Inadequate access to credit and finance; - High labour cost and poor work ethics; - Laboratory services for agro-processors are not available locally; - Technical and extension services and training unavailable; - High cost of raw materials, equipment and packaging material; - Seasonal crops and fruits; - High cost of utilities (energy/fuel, water, etc); - Unreliable local suppliers; - Market barriers and 	<ul style="list-style-type: none"> • Establishment of Agro-processing Plant has created opportunities for expanding the production of value –added products. • The Banana Accompanying Measures (BAM) project has sought to create this enabling environment by upgrading facilities such as the Agro-processing Plant, Honey Producers facilities, Agricultural Diagnostic Laboratory to facilitate improved research and development technologies and agricultural feeder roads.

#	Priority Areas	Challenges	Opportunities
6.	<i>Market Development-Domestic and Export;</i>	<ul style="list-style-type: none"> • Limited value added and fish processing activities; • The need to improve the services provided by the Marketing Board; • Inconsistency in the supply and quality of products; • Inadequate marketing support service, in particular marketing information support eg. price data, cost of production, value chain opportunities etc.; • Limited marketing infrastructure; the need for improved cold storage and agro- processing facilities; • Challenges with regards to inadequate and reasonably priced transport to markets; • Marketing arrangements with hotels and restaurants may not always be favourable for farmers; 	<ul style="list-style-type: none"> • The implementation of the Institutionalization of National Standards and Certification Programme for Major Agricultural Products in St. Lucia will enhance St. Lucia's ability to take advantage of export market opportunities.

#	Priority Areas	Challenges	Opportunities
7.	<p><i>The development and strengthening of appropriate institutional structures, mechanisms and human resource capacities within the Sector Institutions, including the linkages and partnerships (Local, Regional and International)</i></p>	<ul style="list-style-type: none"> • The need for improved coordination between different divisions within the Ministry of Agriculture as well as with other public institutions. • Absent or poorly coordinated institutional mechanism to facilitate inter-sectoral linkages (agriculture, environment, tourism, health, trade, education etc.) to effect the optimization of resources and ensure effective monitoring and evaluation; • The absence of adequate inter-sectoral linkages and coordinating mechanisms; • Inadequate institutional arrangement to deal with the issue of praedial larceny. • Insufficient levels of collaboration among farmers in sourcing inputs and other forms of production support. • Poorly managed and functioning Producer Organisations and Farmers Coops. • Need for Capacity building and strengthening of farmers Groups and Coops 	<ul style="list-style-type: none"> • Organisations such as the St. Lucia Hotel and Tourism Association (SLHTA) have sought to strengthen linkages between farmers and various hotels in St. Lucia. • The creation of a virtual agricultural clearing house. The virtual agricultural clearing house consists of a platform where produce available from farmers are posted to the various hotels participating in the programme. • A number of initiatives are currently being undertaken to effectively curb the incidence of Praedial Larceny. The Sale of Product Bill already in its first reading in the house, is anticipated to be enacted during the financial year 2016/17 coupled with the registration of farmers and the licensing of traders and vendors in the agricultural sector. • The Praedial Larceny Unit of the Ministry of Agriculture in collaboration with the

#	Priority Areas	Challenges	Opportunities
8.	<i>Increased youth and women Involvement in agribusiness</i>	<ul style="list-style-type: none"> • Need to create the environment that would facilitate greater involvement of youth in agriculture. For example: <ul style="list-style-type: none"> - Start-up capital for Youth, - Utilising technologies that would make agriculture attractive for the youth - Formation of agriculture youth cooperatives 	<ul style="list-style-type: none"> - The YAEP Project which is currently being implemented seeks to encourage the involvement and participation of youth in the agriculture and fisheries sector. - Opportunities for the promotion and utilization of modern technology such as protective agriculture, hydroponics and aquaponics

#	Priority Areas	Challenges	Opportunities
9.	<i>Effective management and utilisation of Fisheries resources</i>	<ul style="list-style-type: none"> • Landing sites do not comply with requirements for refrigeration and hygiene • Absence of acceptable quality standards during the production, processing and marketing processes. • Limited value added and fish processing activities. • The need to improve the services provided by the St. Lucia Fish Market Cooperation. • Environmental threats to the industry include exposure to extreme events, including cyclones, floods, and diseases. • The loss of fishing gear as a result of storms and hurricanes, mainly fish pots and fish aggregating devices (FADs), created set-backs for many fishers. • Coastal degradation caused by high seas, and large amounts of silt, mud and debris brought down by the rivers and other surface runoff. This results in the deterioration of resulting in a negative impact on fish stocks ; • High rainfall level also increases the runoff of agro-chemicals from agricultural areas into the sea that results in algal bloom with the corresponding growth of 	<ul style="list-style-type: none"> • The St. Lucia Fish Marketing Corporation has contributed to the development of new product lines (value-added fish products) to boost sales. Recently, the company sought to increase sales of slow moving fish species such as marlin through promotional activities. This has contributed to a significant increase in demand for this fish species by consumers, restaurants and other marketing outlets. • The Department of Fisheries has been very active in promoting the Mari-culture sector through research, training of farmers in Mari-culture (sea-moss) production and the promotion of Mari-culture and its by-products. • Consumer willing to consume local fish and seafood products • Market opportunities within the rapidly growing tourism sector • Aquaculture could be a viable enterprise for high value fish and seafood such as shrimp, tilapia, red snapper etc. • Off-shore large pelagic

#	Priority Areas	Challenges	Opportunities
10.	<i>The protection, conservation and sustainable utilization of natural resource (Land, Water, and Forestry)</i>	<ul style="list-style-type: none"> • The need for appropriate Land use polices and land zoning; • Inadequate access to land by livestock farmers • Undefined land tenure status and squatting on agricultural lands; • Poor condition of farm access roads. • Accelerated soil erosion resulting from over-intensive cultivation and misuse of steep slopes; 	<ul style="list-style-type: none"> • The Ministry of Agriculture is currently implementing a land bank project aimed at identifying, mapping and managing existing crown lands and abandoned farmlands suitable for agriculture that the government could acquire/ access to establish a land bank for agricultural production. This initiative provides the opportunity for ensuring that agricultural lands are available and accessible for investing in agricultural activities and would not be utilized for non - agricultural purposes. • In the past, the Ministry of Agriculture provided incentives to farmers who adopted soil conservation measures. Currently, the Ministry of Agriculture now provides technical
11.	<i>Disaster Risk Reduction and Climate Change Adaptation</i>	<ul style="list-style-type: none"> • Weak capacities for determining disaster and climatic risks, particularly relating to drought, pest infestations (including invasive organisms), and slow onset marine hazards. • Inadequate capabilities for data and information management to support the conduct of climate forecasting, vulnerability, risk, damage and needs assessments, and other critical analysis required for DRM programming. 	

2.2 Strategic Policy Framework

Priority Area 1:

Agriculture Diversification- based on improved Research and Development and utilization of improved technologies.

Policy Goal

The Government of Saint Lucia shall enable the effective and efficient diversification of the Agricultural sector through the promotion and facilitation of improved Research and Development systems and practices, thereby contributing to the economic and environmentally sustainable production of identified non-traditional crops and livestock.

The decline in the banana industry as a result of the removal of trade preferences, which had protected the island main export from external competition for decades, has led to a significant decline in the contribution of the Agricultural sector to the economic and social development of St Lucia. Low agricultural productivity remains a major concern and is a major limiting factor to competitiveness of primary agricultural production on the island.

Within the context of a declining banana industry, agricultural diversification is key to achieving food security, improved human nutrition and increase in rural employment.

The increasing demand for staples by the export market brings with it tremendous opportunities for farmers to increase their production of ground provisions. Saint Lucia's climatic conditions and soil types are favorable for the production of a wide variety of staple crops such as sweet potatoes, yams, dasheen, breadfruit, plantain, and cassava.

The coconut and cocoa industry also offers opportunity for the diversification of the agricultural sector. There is a strong and growing popularity and demand for fresh water (jelly nut) nuts which continue to fetch an attractive price and is starting to encourage excellent prospects for higher value coconut products such as bottled coconut water and virgin coconut oil.

The revitalization of the Cocoa Industry continues to be an important component of the Government's overall policy for transformation of the agricultural sector and the sustainable development of Saint Lucia through agricultural diversification.

Initial market research indicates that there are lucrative market opportunities available for cocoa beans and its derivatives. Besides, a review of the global cocoa market has indicated prospects for an increase in world cocoa prices in the future.

Through its Crop Development Programme, the Ministry of Agriculture is seeking to improve coffee production by undertaking a five-year coffee development programme island wide.

The Objective of the programme is to promote the development of an economically viable and environmentally sound coffee production system through rehabilitation of existing coffee stands, expansion of coffee acreages and the introduction of appropriate management practices so as to enhance the quantity and quality of coffee beans produced and marketed.

The programme will involve the rehabilitation of the existing coffee acreages and the establishment of 150 new acres.

Support to the Development of the Fruits, Vegetables, and Roots and Tubers is being provided by the FAO supported Food *Production / Value Chain Project (2015-2017)*.

The primary objectives of the Project are:

- To increase production and productivity of selected non-traditional agricultural crops,
- To increase the supply of selected agricultural crops to the domestic market (inclusive of school feeding, correctional facilities, households and the tourist industry)

The proposed Agricultural Sector Policy and Strategy will seek to build on the successes of ongoing agricultural diversification programmes.

Strategic Objectives

- A. To promote the diversification of the Agricultural sector through the enhanced production of crop such as: Roots and Tubers, coconut, cocoa, coffee, Fruits and Herbs and Spices.
- B. To facilitate greater investment in agricultural research and development to facilitate the development, acquisition, dissemination and utilisation of improved and appropriate technologies such as Climate Smart Agriculture; Greenhouse technology development; Organic agriculture production; Water Storage/ Irrigation development.
- C. To Strengthen the Institutional, human and technical resource capabilities of National Research and Extension, to facilitate the improvement of institutional structures and skills critical for the development and effective dissemination of new and existing technologies to stakeholders.
- D. To develop collaborative linkages with regional and international Agriculture Research Institutions.

Policy Instruments:

- Subsidies on specific agricultural inputs targeted for increase efficiency and effectiveness in domestic production.
- Implementation of the Agriculture Incentive Act.
- Investment in Human Capital- relevant training and Technology transfer.
- Investment in R&D and Extension
- Introductions of measures to stimulate the promotion and utilisation of Improved Production Technologies.
- Duty free concession for the purchase of a new farm vehicle to be used for agribusiness activities.
- Strengthening of Bilateral relationships that will facilitate the procurement of technical and financial support for the sector (eg. Taiwan Government)

Priority Area: 2

Resuscitation of the Banana Industry

Policy Goal

The Government of Saint Lucia will implement production and market related measures that will facilitate the revival and future expansion of the banana industry.

St. Lucia has, traditionally, been the largest exporter of bananas in the Windward Islands. During the period of peak banana production and trade, St. Lucia accounted for and estimated 53 percent of the bananas produced in the Windward Islands. However over the past eight years or more there has been a noticeable decline in Banana production in St. Lucia. This has resulted in a significant migration of farmers out of the industry.

Over the period 2010- 2015 banana exports by two of the major exporting companies, Tropical Quality Fruit Company (TQFC) and St. Lucia National Fair Trade Organization (SLNFTO) fell from 21,701tonnes in 2010 to 8,319 tonnes in 2015.

After several years of decline, banana exports increased to 15,056 tonnes in 2015. This was primarily due to an increase in the e volume of exports to the Caribbean region, which more than doubled to 6,737 tonnes mainly reflecting a dramatic rise in exports to Trinidad and Tobago.

Since 2010, the banana industry has been threatened by black sigatoka disease (also known as banana leaf spot disease), which has infected roughly 70 percent of the country's banana plants. The impact upon the development of the banana industry has been severe with most banana farmers lacking the funds and technology needed to control the disease.

A Black Sigatoka Management Unit was developed by the Ministry of Agriculture to focus on the control and eradication of this disease. In support of this programme, the Republic of China (Taiwan) have provided technical and financial support to assist in the fight of the Black Sigatoka disease.

The main components of this Programme included: (1) assisting in the establishment of a model for the control of black sigatoka; (2) introducing disease-resistant varieties of banana; and (3) providing guidance to banana farmers in order to improve on-farm disease management techniques.

Specific project work components i: (1) establishing a soil analysis laboratory and a pathological analysis laboratory and stations, allowing St. Lucia to establish disease analysis, monitoring and early warning mechanisms; (2) introducing new varieties of disease-resistant bananas; and (3) establishing standard operating procedures for field

management and disease control, thereby building the capacity of agricultural extension officers to guide farmers in carrying out on-farm disease management.

The current Government of St. Lucia, which was elected to office in May 2016, has articulated its desire to bring about growth and economic development within the agricultural sector as part of the 'Five to Revive' strategy. This will involve:

- Revitalize the banana industry and implement a programme to assist banana farmers with inputs including land preparation, drainage, financing, and the development of downstream industries.
- Evaluate the possibilities of introducing value added products that can be manufactured from bananas.

During the second half of 2016 the Government of St Lucia have held discussions with potential banana trader in the UK and France with regards to once again exploring European market opportunities for bananas imported from St. Lucia. Indication are that there is an existing opportunity for banana exports into Europe to recommence as of January 2017.

Strategic Objectives

- A. The Development of a Banana Production Recovery Plan.
- B. Improved Production Technologies for the production of bananas.
- C. The identification of areas for improvement along the value chain and the development and implementation of mitigation measures to facilitate efficient and effective production and marketing systems and processes.
- D. The identification and development of market opportunities (Regional and International) for primary and processed banana products.
- E. The development and Strengthening of the required Institutional framework to support the production and marketing of bananas

Policy Instruments

- Production enhancement technologies and mechanisms facilitated.
- Market and Trade Facilitation measures implemented.
- Mechanisms to facilitate access to affordable Agri-business financing /credit.

Priority Area 3:

Enhance National Food and Nutrition Security

Policy Goal

The Government of Saint Lucia will improve the Food and Nutritional status and well-being of the population through the production and consumption of safe, affordable, and nutritious quality Caribbean food commodities/products.

The National Food and Nutrition Security Policy and Action Plan was developed in 2013 by the Government of St Lucia in collaboration with the UN Food and Agriculture Organisation (FAO). Information provided in the study indicates that in 2012 approximately 21 percent of the population was considered to be living below the poverty line. High unemployment and high food prices have resulted in several households unable to earn incomes and procure foods to meet their nutritional requirements resulting in 16 percent of the population being regarded as indigent.

In rural households, food security is threatened by the lack of economic access to food due to movement of farmers away from agriculture and the inadequate support to farmers engaged in food production both for income generation and for feeding of their families. Many rural farm households rely on their livelihood from off-farm employment.

Despite shifts to diversify, farmers have not been able to meet domestic demands of staples, vegetables and legumes. More of these commodities are therefore imported than is produced locally. This means that these farm households are net purchasers of food who buy more food on the market than they are able to produce.

The findings of a Nutrition Vulnerability Assessment conducted jointly by FAO/CFNI (2007) suggests that the challenge of Food and Nutrition Insecurity in Saint Lucia might be better described in terms of consumption/utilization rather than availability and access.

Saint Lucia is experiencing a period of nutritional transition that is reflected in a shift in diets away from indigenous staples (starchy roots and cereals), locally grown fruits, vegetables, legumes, and limited foods from animals, to diets that are more varied and energy dense energy-dense diets based on more processed foods and beverages. The major concerns are therefore the influence of life styles practices on the composition of the daily diet and the fact that a large percentage of these foods are imported. The concern for consumption emerges from the increase in the incidence of non-communicable diseases (NCDs) which is affecting both adults and children.

With respect to stability of Food Supply, Saint Lucia is a small twin island State that is vulnerable to shocks from external economic forces, hurricanes, droughts, invasive species, and wind storms. Changes in the global and regional climate bring more frequent and higher risks of natural disasters that have the effect of reversing several years of economic growth. There is therefore a critical need to strengthen disaster preparedness and risk mitigation strategies to protect agriculture, social infrastructure, the ecosystem, and housing.

Strategic Objectives

- A. Increased access to adequate and safe food supplies for the population;
- B. Improving national capacity for and conducting vulnerability mapping
- C. Improved consumer protection through improve food quality and safety.
- D. Improved nutritional status of the population through consumption of healthy foods.
- E. Implementation of a Biosafety Framework for Agricultural products

Policy Instruments

- Promotion by the Public and Private sector of a “Eat local and healthy” Campaign
- Social protection system- Social safety net programs targeting senior citizens, single mothers and people living with HIV/AIDS (PLHIV);
- Operationalization of National Food Emergency Plan and Strategy;
- Establishing a Food Crisis fund
- Effective Consumer Protection legislation and regulations
- Legislation and regulations enforcing food safety standards
- Nutrition awareness and sensitization education programs
- Greater inter/intra sectoral collaboration between relevant Ministries (eg. Agriculture, Health, Education, Social Transformation, etc.)

Priority Area 4:

Reduction in the Food Import Bill

Policy Goal

The Government of Saint Lucia shall support enhanced local agricultural production and productivity and the increased consumption of locally produced primary and processed foods, thereby enabling a reduction in Food Imports.

St. Lucia's food import bill has been constantly increasing over the last decade. The current trend of rising global prices for agricultural commodities and inputs means that the country continues to lose valuable foreign exchange through food imports.

Over the past five years the value of food imports have shown an increasing trend reaching a total **EC\$ 363,334,000** in 2014.

Total food imports exhibited growth over the period (2010-2014) increasing from EC\$276.5 million in 2010 to EC\$363.3 million in 2014. The composition of food imports remained fairly constant throughout the five-year period. Meat and meat preparations, cereal and cereal preparations, vegetables and fruits and dairy products and eggs were the four major categories of food items imported over the five year period and accounted for 22.1 percent, 20.3 percent, 15.8 percent and 12.8 percent respectively of the total value of food imports in 2014. Meat imports accounted for the largest category of food items imported over the period. Imports of chicken accounted for the largest category of meat imports, followed by pork and beef.

Available data shows that St. Lucia's imports of fruits have also been on the increase. Increasing demand for melons and pineapples by households and the hotel sector presents opportunities for farmers to increase the production of these commodities. Passion fruit is also highly consumed within households and the hotel and tourism industry.

The Ministry of Agriculture through the implementation of Programmes such as *The Fruit and Vegetable Demonstration and Extension Cooperation Project* is promoting the cultivation of a number of crops including watermelon, cantaloupe, papaya, pineapple, tomato, sweet pepper, cabbage, lettuce and cucumber for import substitution. Cassava is also being promoted as a substitute for wheat flour.

In an attempt to expand the market for local produce, the Government of Saint Lucia with the support of the Food and Agricultural Organization and the Government of Brazil, is seeking to improve the nutrition in schools through the restructuring and expansion of the School Feeding Programme.

Strategic Objectives

- A. The increased production, marketing, consumption and utilisation of locally produced agricultural commodities;
- B. Ensuring that the legislative framework and required institutional structures and measures are in place to promote and facilitate the increased consumption of locally produced primary and processed foods.

Policy Instruments

- Promotion by the Public and Private sector of the “Eat local and healthy” Campaign- Eat Fresh, Buy Local.
- Investment in local storage facilities
- Increased import duties and tariffs on specific food items.
- Ensuring that the meals provided under national school feeding programmes have a high input of local/regional foods
- Incentives to nationals to attract investment in agriculture and agriculture related value addition.

Priority Area 5:

Agro processing and Agribusiness Development

Policy Goal

The Government of Saint Lucia will seek to develop a highly competitive Agro processing and Agribusiness sub-sector supported by an enabling environment that will foster the establishment, survival and growth of specific manufacturing and business enterprises.

The Agro Processing sector in St Lucia is characterised by a few large producers (i.e. Baron Foods, Viking Traders, and Frootsy Foods) and a large number of cottage industry type producers. There are 147 entities classified as agro processors in St Lucia of which 101 is engaged in food processing and 46 classified as non-food processors (Crafters and woodworkers). There have been in the past a number of well-known food related agro-processing initiatives which after years of existence were not able to sustain themselves and were considered to have failed.

The Agro-processing sub-sector in St. Lucia can be developed by facilitating the development of medium scale viable agro-enterprises and cottage industries. This approach is expected to be more sustainable and viable than one that involves the establishment of large state- run Agro-processing enterprises. Two main types of Agro-processing sub-sectors currently exist in St. Lucia. These include (1) an informal micro-level and cottage processing sub-sector and (11) a formal commercial sub- sector which has developed mainly through investments by established private entities.

Most agro-processors, large or small, typically process more than one category of product. These cottage-type operations are plagued by relatively high-cost of inputs and utilities, quality and standardization issues, poor packaging material, inadequate labour supply, raw material availability, and inefficiency in operations among others. Furthermore, most of the products are assessed for quality and standards based on the experience of the processor, rather than scientific measurements due to lack of access to adequate testing facilities, thus resulting in inconsistencies in product quality.

Notwithstanding these constraints, agro-processing, value-added and agri-business development in general, can have several positive benefits to the development of the Agricultural sector and a country's economy in general. These include:

- The reduction of post-harvest losses;
- Extension of the shelf-life of food, providing perishable commodities with greater marketability
- Improved access to markets.
- Enhancing incomes and creation of employment along the food chain from production to marketing

However, to fully capitalize on the afore-mentioned positive benefits, the necessary support must be given to the Agri-business/Agro-processing sub-sectors. These support measures include access to credit and required inputs, quality control, product promotion, niche marketing and appropriate technology.

Some key recommendations for the sector include:

- Improve coordination and linkages among institutions/agencies and stakeholders impacting the sector;
- Improve the quality of human resource available at all levels in the agro-processing sector;
- Focus on improving the quality of both inputs and outputs
- Establish community based incubator facilities for agro - processors.
- Promote alliances among hotels, farmers, input suppliers and other relevant supporting agencies providing technical and financial services.
- Provide training in Agro Processing and Business Management where needed

Strategic Objectives:

- A. To develop a framework for providing required technical and financial support to SME Agro-Food producers and processors.
- B. To facilitate the provision of required infrastructure, equipment, packaging material, etc. required for the development and enhance processing of agricultural products.
- C. Promotion of agri-business opportunities among stakeholders (agro-processors) through various capacity building initiatives including training in food safety standards, standards for certification of organic farming, business management
- D. To develop a production and marketing network involving suppliers, producers, marketers, financiers and buyers that will ensure sustainability and expansion of the agro-processing initiatives
- E. To organize existing Agro-processing facilities for use as incubators to accommodate the development of the selected agro processing enterprises (These facilities are the Anse Ger Agro-Processing Facility for Rural Women, the Anse Ger Cocoa Micro-Fermentry, the Fond Assau Agro- Processing Facility and La Caye Mille Fleur Honey Processing Facility

Policy Instruments

- Government's Promotion of an aggressive food import replacement programme
- Provide tax incentives to promote value addition and agro-processing industry development both in rural and urban areas.

- Provide Technical assistance and training in the areas of Food Safety and Quality Management systems and Good Manufacturing Practices;
- Public Health and safety Legislative Framework and Quality Management Infrastructure
- Promote policies to provide incentives for sectors which use more local raw materials, as a pull mechanism for food production growth.
- Implementation of certification systems and the creation of the enabling environment for accreditation.

Priority Area 6:
Market Development- Domestic and Export

Policy Goals

The Government of Saint Lucia will promote and develop the effective and efficient marketing of locally produced agricultural commodities and by-products on the domestic and export markets by fostering/facilitating the development of domestic, regional and international market opportunities.

The identification and development of Market Opportunities is a critical factor in the overall development of the Agricultural Sector. The heavy dependency on food imports is an indication of the fact that there is a great opportunity for the production and marketing of locally produced agricultural produce.

Over the last five years the Consolidated Foods Limited (CFL), a private limited liability Saint Lucian Company involved in food retail, has played a meaningful role in boosting agricultural production in St. Lucia. Starting in 2010 CFL'S Farmer Programme has provided tangible incentives to producers of fruits, vegetables, roots and tubers, condiments and livestock products in boosting their level of production through CFL's interest free loan programme to farmers coupled with a guaranteed market for their produce.

In addition to crops CFL has achieved enormous success in working with local producers in developing the domestic market for livestock products. To this end, sales of locally produced chicken have grown significantly in recent years while production of locally produced pork, goat and rabbit meats has increased while tilapia production has also seen appreciable increases.

One of the challenges facing local crop producers marketing produce to the Hotel Industry, is the length of time required before payment is received (an estimated 3 months). This has a negative impact on the availability of financial resources to enable the purchase of inputs and pay for labour required for continued production. Farmers have however found a favourable solution to this challenge by the development of collaborative relationships between Farmers Cooperatives and Credit Unions. This relationship has facilitated the use of Invoices provided by the Hotels being accepted by the Credit Unions as a form of collateral for loans offered to farmers. Payments for the produce is thereafter made directly to the Credit Union by the Hotel. This arrangement has had a positive impact in significantly mitigating the cash flow challenge related to the marketing of crops faced by a number of farmers.

However, given the small size of the domestic market in Saint Lucia, it is would also be required that the successful diversification of the agricultural sector be supported by exploring viable export market opportunities.

Strategic Objectives

- To develop and enforce the required policies and legislations that would create the development of a safe and efficient market and trade environment.
- Restructuring and Revitalization of the St. Lucia Marketing Board to provide the following functions:
 - provision of support services required to stimulate the development of new sustainable value-added commercial local agro-food products;
 - To provide the necessary marketing infrastructure to effectively and efficiently facilitate the storage and distribution of agricultural commodities;
- To establish agricultural marketing information systems and cost of production databases in order to provide vital information for production planning and marketing.
- To meet the domestic, regional and international market requirements by adhering to quality, grades and standards established by the market for Agricultural products.
- Strengthening Producers' Organizations to facilitate greater collaboration in production planning, and marketing of produce.
- Strengthen linkages between agriculture and other sectors, in particularly tourism, manufacturing transport etc.

Policy Instruments

- Facilitating the creation of production clusters and fostering the value chains approach
- Investment in local Storage Facilities
- Implementation of Regional Trade and Market Integration Policies.

Priority Area 7:

The Development of appropriate institutional structures, mechanisms and human resource capacities within the Agriculture Sector Institutions, including the linkages and partnerships- (Local, Regional and International)

Policy Goal

The Government of Saint Lucia will develop and strengthen the institutional structures and mechanisms and forge the coordination and collaborative relationships required at the national, regional and international levels, in order to create the appropriate institutional platforms and systems required for the development of an efficient and productive Sector.

Consultations with key stakeholders have highlighted the inadequacy of Agricultural Institutions to formulate and implement policies to effectively manage and utilize available resources to increase production and productivity within the agricultural sector. This has resulted in the failure of agricultural and food policies and associated strategies to attract sufficient private sector investments to establish modernized and competitive agri-food businesses. Moreover, the high turnover of senior management staff within the Ministry of Agriculture has been a key constraint in the provision of consistent and continuous leadership. This has affected work efficiency, including the ability of the Ministry to effectively implement agricultural policies.

Strengthening the institutional environment requires attention to issues of governance, institutional coordination and collaboration. The establishment of relevant Private-Public sector partnerships and the strengthening of stakeholder institutions, such as producer groups and organizations are also required to ensure the optimization of benefits.

Strengthening cooperatives/ farmer organisations to enable them to become more effective and efficient contributes to increased productivity efficiency. Supporting actors, such as NGOs and community-based organizations, have a key role in promoting development of farmer groups. It is also in the interest of agri-businesses to support the creation and operation of farmer groups, as it is more efficient and therefore financially viable for them to work with groups, for example for supply of inputs and purchase of greater volumes of product. Moreover, Government should actively seek to encourage more individual farmers to become members of cooperatives, as there are a number of benefits that may be derived by farmers through co-operative formation that could not be achieved individually. This includes the ability to pool resources in order to take advantage of economies of scale such as bulk purchasing of inputs which can then be sold in smaller quantities thus providing financial savings to each member. In addition, cooperatives have the ability to lobby government for various benefits such as incentives and rebates, negotiate prices for members, service markets that individual members could not service, such as pooling produce to generate adequate volumes needed by processors and exporters. Members can assist each other in performing various critical tasks such as harvesting, grading and selling of produce. Co-operatives can provide training and education for members which can contribute to increases in productivity/profits for members.

Co-operatives provide a medium whereby governmental and other agricultural organizations such as IICA and FAO could design programs that reach a multitude of farmers/fishers without having to deal with individual farmers/fishers. These organizations could be provided with the requisite expertise to run projects and programs

on behalf of farmers. This type of arrangement saves time and resources, and provides a good framework for monitoring and evaluation of initiatives by these entities.

Currently, there are ten (10) registered Farmers' Co-operatives on the island. They usually purchase members' fresh produce and sell to hotels, supermarkets, the Marketing Board and market vendors at a wholesale price. However, most of these organisations are not well managed. There is a need to strengthen the capacity of these cooperatives to provide appropriate agricultural services to their members.

Strategic Objectives

- A. Establish a functional, efficient and effective public sector support framework for the agricultural sector to ensure appropriate, coordination, planning, service delivery, monitoring and evaluation.
- B. To strengthen and further development the human resource and organizational capacities of supporting institutions, particular farmer's associations and Co-operatives to encourage greater private sector participation in the sector;

Policy Instruments

- Investment in Human Capital
- Networking and Advocacy to strengthen linkages with other industries such as Tourism, regional and international partners
- Registration of junior co-operatives and mobilization of the public for increased membership in co-operative societies
- Improving compliance standards through sanctions, fines and interventions to also include mergers and amalgamations
- Facilitate stakeholder committees to enhance the voice of the fisher folk, transport and farmer co-operative sectors in policy development
- Promotion of the co-operative business model through educational programmes, media platforms, workshops

Priority Area 8:

Increased youth and women involvement in Agribusiness

Policy Goal

In the interest of facilitating the long-term development of the agriculture sector, the Government of Saint Lucia will create the enabling environment and opportunities that will stimulate the increased involvement of youth (including women) in agriculture production and agribusiness enterprises.

The average age of a farmer in Saint Lucia is between 50-55 years. With the migration of young people from rural to urban areas, shortage of labour available for agricultural production has become more critical.

Over the years a number of programs have been employed to stimulate the interest of youth in agriculture. However, the involvement of youth in agriculture is constrained by several factors including:

- difficulty accessing land and required capital investment,
- the unattractiveness of agriculture because of its relative low profitability and high risk;
- the relatively long gestation period of many agricultural enterprises.
- inadequate technical training;

In 2012 the Government of St. Lucia secured grant funding from the CARICOM Development Fund in the amount of EC\$3.68 million to directly finance the Youth Agri-Entrepreneurship Programme (YAEP). The overall contribution of the investment from the CDF to Saint Lucia was EC \$16.64 million, of which \$3.68 will go directly to the Program, \$9 million to the Saint Lucia Development Bank for farmers involved in the YAEP to get access to credit on concessionary terms and \$2.69 million to support exports through the Trade Export Promotion Agency.

The YAEP was set up by the Ministry to help develop a cadre of young agri-entrepreneurs through the application of best practices, the use of appropriate technology and mechanisms that will realize sustainable agricultural enterprises.

As part of the Programme, Invest Saint Lucia, has vested 80 acres of its strategic land assets to the Ministry of Agriculture, Food Production, Fisheries, Cooperatives and Rural Development to be used as part of the Youth Agricultural Entrepreneurial Programme

One of the specific objective of the EU supported BAM Initiative, currently being implemented in St. Lucia, is to enable the rural population, particularly the youth, to tap into a whole value chain that will generate sustainable livelihoods and create incomes. The anticipated outcome are:

- The creation of an enabling environment that will assure the entry of a cadre of 150 young entrepreneurs into agriculture.
- Intensively incubate young agri-entrepreneurs and cultivate their critical thinking, leadership and entrepreneurial skills through mentoring and a series of practical competency based training programs offered by the National Skills Development Centre (NSDC).
- Adopt and introduce new and modern technology that assures a constant and reliable supply of farm and value-added products for the domestic and export markets.
- Create sustainable rural livelihoods and incomes for communities in some of the more poverty prone areas in the country.

The St. Lucia Agricultural Forum for Youth (SLAFY) is a part of the Caribbean Agriculture Forum for Youth (CAFY). As a larger Caribbean initiative, CAFY was set up to encourage greater youth participation in agriculture. It is meant to be the youth voice in the field for the region with chapters throughout the islands.

SLAFY seeks to assist its members in developing and participating in agriculture, through involvement in primary production activities, agribusiness, training, and policy making.

The present Government of St. Lucia is cognisant of the importance of the involvement of youth in agriculture production and agribusiness enterprises, for the long term sustainable development of the sector. As such priority attention is being given to the reactivation and effective implementation of programmes such as the Youth Agri-Entrepreneurship Programme.

Strategic Objectives

- A. The promotion and further development of the Youth Agri-Entrepreneurship Programme (YAEP)
- B. Creating the enabling environment to ensure that Agribusiness is seen as a viable career option for young people, including women.

Policy Instruments

- Agricultural incentives to facilitate initial Capital Investment
- Land banks
- Credit policies facilitating access to credit for youths

Priority Area 9:
Effective management and utilisation of Fisheries
resources

Policy Goal

The Government of Saint Lucia will foster socio-economic prosperity in the fisheries sector through the introduction of measures for the effective management, conservation, sustainable utilisation of available marine capture fisheries and living marine resources to the people of Saint Lucia.

Saint Lucia's marine environment is its fisheries resources and other aquatic organisms, and is one of the State's most valuable assets. The value is not only in what can be harvested on a sustainable basis, but in the physical environment that shapes the lifestyle and cultural heritage of the people of Saint Lucia.

Commercial fishing forms a large part of the social fabric of many coastal communities in Saint Lucia and is a key driver in the economic development of these communities as well as a pivotal role in supporting national food security, since most of the fish landed is consumed locally. The majority of commercial fishers operate small-scale artisanal fishing vessels targeting multiple fisheries. Annually, it is estimated that over 300 vessels are licensed which is estimated at less than 60% of the total number of vessels operating in the sector. The major commercial fisheries, such as large ocean pelagic fish species, spiny lobster and queen conch make a valuable contribution to the fisheries sector contributing an estimated 75% of the total ex-vessel value of fish landed annually.

It is the attributes of the marine environment that attracts the many tourists who visit the island each year who are significant contributors to the Saint Lucian economy. Aquatic tourism, which includes extractive and non-extractive charter tours, is a growing industry with over 40 vessels licensed to engage in sport fishing, SCUBA and snorkelling creating direct and indirect jobs.

Fishery resources are described as 'common pool resources' in that they are generally owned by no-one until the point of capture. The natural rate of production (growth and reproduction) of a fish population ultimately controls the rate of sustainable harvest that is possible. Fishing can affect production rates by changing the population biomass, as can other environmental variables such as habitat availability, water quality and the effects of climate variability. Governments intervene to regulate fisheries for the benefit of the community, ensuring long-term sustainability. Good fisheries management is reliant on sound science, quality management processes with effective engagement and consultation with stakeholders, and effective compliance with fisheries management controls, taking into account the precautionary principle. The Fisheries Act Chapter 7.15 of the revised laws of Saint Lucia (2008) directly relate to the development and management of fisheries in

Saint Lucia. The Act makes provisions for the promotion and regulation of fishing in the fishery waters of Saint Lucia and for connected matters.

For Saint Lucia's growing population, sustainable, profitable, healthy and viable fisheries are of utmost importance. This Policy Statement outlines the Government of Saint Lucia's strategic policy objectives and strategic actions for the use of the State's marine fish and living marine resources by the commercial and recreational fishing sectors as well as services to be provided to support non-extractive recreational use of living marine resources in an effort to achieve the Policy goal.

The bulk of the landed catches are sold locally to retailers/vendors and directly to consumers, and to middlemen or fish traders. The Fish Marketing Corporation undertakes fish processing, cold storage marketing of fish and fish products

Major threats in the sector include exposure to extreme events, including cyclones, floods, and diseases. The loss of fishing gear mainly fish pots and fish aggregating devices (FADs), created set-backs for many fishers. Small fishers were affected to an extent by the coastal degradation caused by high seas, and large amounts of silt, mud and debris brought down by the rivers and other surface runoff. High rainfall level also increases the runoff of agro-chemicals from agricultural areas into the sea that results in algal bloom with the corresponding growth of algae that kills fish life.

The aquaculture industry is seen as a valuable component of the agricultural diversification thrust. There are a small number of fish farms on the island. With support from the Taiwanese Government, Saint Lucia expanded the local production of freshwater fish and shrimp to complement its quota of ocean fish and seafood.

The FAO funded seamoss development project is currently being implemented and is aimed at providing stakeholders along the seamoss value chain, as well as policymakers and donors with a clear strategy and an action plan on how seamoss production can be developed into a robust, sustainable business.

Strategic Objectives

- A. To ensure that fish stocks and the structural habitats on which they depend are managed sustainably, maintaining their characteristic structure and function, productivity and diversity, through the establishment of appropriate and cost-effective controls.
- B. To optimise the socio-economic benefits of fisheries and living marine resources, within the overarching requirement of stock sustainability.
- C. To work with the commercial fishing sector to seek opportunities to increase the value of, and economic return from commercial fisheries (within the context of the fully or near-fully exploited nature of many fisheries).

- D. To strengthen partnerships and improving the knowledge base associated with recreational fishing, SCUBA, Hookah and snorkelling to enhance safety standards and the quality of these recreational experiences.
- E. To implement effective measures to improve sanitary and phytosanitary (SPS) standards as well as occupational health and safety standards within the fishing industry.
- F. To safeguard all fishers and fishing communities from the negative impacts for all development proposals by taking into account mitigation actions in the assessment and approval processes.

Policy Instruments

- Upgrade fisheries data management systems and expand the register of information on primary stakeholders.
- Provide continuing education opportunities with an emphasis on training and courses that will be essential tools to increasing knowledge and developing resource user's skills.
- Develop, disseminate and make publicly accessible scientifically-based communication material which presents recent information on domestic fisheries, marine habitats, and fisheries science and management.
- Provide incentives for fishing inputs that are intended to reduce unsustainable fishing practises, promote safety and SPS standards and disincentives for unsustainable fishing.
- Review and approve management and development plans for fisheries in the fishery waters in consultation with persons affected by the fishery plans.
- Improve compliance mechanisms to manage the level of illegal and destructive fishing practises.

Priority Area 10:

The protection, conservation and sustainable utilization of Natural Resources (Land, Water and Forestry)

Policy Goal

The Government of Saint Lucia will implement legislations and programmes that will ensure the protection and conservation and sustainable utilisation of natural resources that form an integral component of the of Agriculture, Forestry and Fisheries Sectors.

Saint Lucia is the second largest of the Windward Islands, with an area of 616 km². It is 42 km long and 22 km wide with very irregular, steep terrain especially in the interior. The island has fertile, volcanic soils but due to mainly topographical constraints, only 28 percent (17, 360 ha) of the total land area is suitable for agriculture. Land zoning and appropriate land use planning is therefore of paramount importance.

Saint Lucia's forests, waters, wildlife and habitats are vital for the social, economic and cultural well-being of the country. As such they should be preserved and wisely used for enjoyment and benefit of future generations.

The conservation of St. Lucia's natural resources is crucial for the country's economic health, both because of the island's small size and on account of its reliance on tourism as a key driver of the economy.

Saint Lucia, like other eastern Caribbean countries, is vulnerable to a number of natural hazards, including landslides, flooding, hurricanes, storm surge, earthquake, drought, and volcanic activity.

Increased investment and development in areas of Land and Water Management would contribute significantly to ensuring the availability and accessibility of quality agricultural land for productive use by the present and future generations and the improved rates of productive utilization of agricultural land.

Water management for agriculture is an increasingly important concern as a way to cope with climate-related water-stress, particularly in rain-fed agriculture.

Increasing population densities and growth rates together with the fast expansion of the tourism industry, and uncontrolled coastal development and urbanization, have over times resulted in the destruction of critical ecological buffers and increased the vulnerability of coastal infrastructure and land uses in the several parts of the island of St Lucia.

This increasing demand for coastal tourism has changed the demand for land-use and increased the price of coastal lands. Trends in coastal lands have been skewed towards

high-density, mass-market tourism sites close to the water's edge, which have increased the competitiveness of tourism with other activities for coastal land.

Unfortunately, the growth of tourism in the absence of coordinated land-use planning and development controls has led to patterns of urbanization which are rendering coastal infrastructure increasingly vulnerable to climate variability and change.

Characterized by a high concentration of hotels, ports, roads, settlement along the coast, often in low-lying reclaimed areas, a majority of St. Lucia's population and critical infrastructure is located on low-lying reclaimed coastal land. This situation has made the country extremely vulnerable to extreme weather events and projected sea level rise. For example, over 60 percent of the entire population resides along the Castries-Gros Islet corridor on the northwest of the island, where much of the settlements are built upon low-lying coastal lands prone to flooding.

One of the critical need for reducing the island's vulnerability to sea level rise is the development of comprehensive land-use plans that account for high hazard areas and climate risks. Such plans need to be integrated throughout several government agencies and developed through consultative processes to include public participation. Based on hazard maps and projections of climate change, plans could be designed to limit infrastructure and land uses based on vulnerability to both current climatic conditions and projected changes.

As of July 2016 the Ministry of Agriculture, Fisheries, Physical Planning, Natural Resources and Co-operative, is now comprised of two Departments:

- Department of Agriculture, Fisheries, Natural Resources and Cooperatives;
- Department of Physical Planning

The Division of Natural Resources has responsibility for Forest and Land Resources Development, Water Resources Management, while the Physical Planning Department has responsibility for Land Administration and Planning.

The Ministry therefore has primary responsibility for land-use planning and natural resource management planning that encompass the Agriculture, Forestry and Fisheries sectors.

The Saint Lucia Forests and Lands Resources Department: Strategy 2015–2025, was developed over the period 2014-2015, through a participatory process that involved all members of the staff of the Department, senior members of the Ministry of Sustainable Development, Environment, Science and Technology, representatives of other Ministries and Departments, NGOs, experts and the wider public. A National workshop held in January 2015, resulted in the second draft of the document. Following final consultations, the final draft of the Saint Lucia Forests and Lands Resources Department: Strategy 2015–2025 was produced.

The Strategic Plan articulated in this document, with regards to the development of the Forestry, Land and Water resources in St Lucia, would form the basis of the Strategic Objectives, Policy Instruments and Actions that are recommended for the achievement of the above articulated **Priority Area 10** and associated Policy Goal.

Strategic Objectives

- A. Maintaining a healthy ecosystems and with thriving species;
- B. Ensuring sustainable flows of products that support both local economies and biodiversity conservation.
- C. Improve and promote public awareness and education by means of public tours and visitation, and cultural enrichment
- D. To develop and implement a comprehensive land-use plan, thereby ensuring the availability and optimal utilisation of quality lands for Agriculture through land zoning, and appropriate land tenure arrangements
- E. Ensure the availability and accessibility of quality agricultural land and water resources through investment (public and private sector) in required infrastructure.
- F. Develop and implement an integrated coastal management plan.
- G. The conduct of relevant Research, Monitoring & Hazard Mapping of land, water and forestry resources.

Policy Instruments

- Investment in infrastructure - the provision of public goods, such as rural infrastructure (roads, water storage facilities, etc.);
- Introduce regulations to phase out development in high hazard areas;
- Strengthened regulations to protect ecological buffers.
- “Stewardship” incentives, conservation compliance and regulatory assistance programs.
- Promotion of the use of ecologically friendly agricultural practices such as composting, organic production,....
- Incentives to farmers who adopted soil conservation measures.

Priority Area 11:

Disaster Risk Reduction and Climate Change Adaptation

Policy Goal

The Government of Saint Lucia will support the development and implementation of sustainable and environmentally friendly Disaster Risk Reduction and Climate Change Adaptation Strategies that will facilitate the integration of disaster preparedness, response, recovery and rehabilitation in the development framework of the Agriculture, Forestry and Fisheries sectors

Saint Lucia, like other Small Island Developing States (SIDS), is highly prone to devastating and natural disasters.

The fragility of ecosystems coupled with limited human capacity and financial resources, have so far precluded the development and implementation of a robust adaptation programs. For a climate vulnerable country like Saint Lucia adaptation to climate change is a fundamental development priority.

Agriculture was severely affected by the impact of Hurricane Tomas (2010) which caused loss of lives and livelihoods in farming and forested areas. There were massive land movements, devastating floods and loss of infrastructure across all sectors. Extended drought conditions for more than six months in 2009 had created extremely high potential for surface erosion and mass movements in the slopes in the event of even a normal to heavy rainfall period. Impact on the sector was widespread with damages to farmland, physical infrastructure, crops, livestock, fisheries and forestry.

The human, physical, economic and environmental cost associated with natural disasters and emergencies could have a devastating economic and social effects on a country. This emphasizes the need for a comprehensive National Plan for Disaster Management, that would clearly articulate the critical procedures, and coordination mechanisms and resources required in such situations.

An assessment of the impact of Climate Change on Small Island Developing States (SIDS) over the coming decades has resulted in the identification of several areas of possible negative impact. These include:

- Agricultural land and thus food security will be affected by sea level rise, inundation, soil salinization, seawater intrusion into freshwater resulting in the decline in freshwater supply;
- Agricultural production will be affected overall by extreme events- droughts and flooding;
- Fisheries will be affected by increasing sea surface temperatures, rising sea level and damage from tropical cyclones. Degradation of coral reefs and bleaching will impact fishing incomes;
- Forests affected by extreme events will be slow to regenerate. Forest cover may increase on some high latitude islands;
- Habitability and thus sovereignty of some states will be threatened due to reduction in island size or complete inundation.

There is therefore a significant need for the identification of areas vulnerable to sea level rise. Government agencies and research institutions should prioritize capacity building for vulnerability assessments to delineate critical hazard areas, particularly as a result of current and projected storm surge and wave action. The generated information can then be integrated into the land-use planning and development processes.

Building resilience to Climate Change is now considered to be an area of priority on the socio-economic development agenda of most CARICOM member states. In recent years several programmes have been implemented to promote sensitization and greater awareness to the challenges that are likely to be associated with Climate Change and investigation of possible coping mechanisms.

The Inter-American Institute for Cooperation on Agriculture (IICA) in collaboration with the Ministries of Agriculture in several Eastern Caribbean States (Antigua and Barbuda, Dominica, Grenada, St. Lucia, St. Kitts and Nevis, and St. Vincent and the Grenadines) have introduced a competition entitled “Climate Smart Agriculture”. This competition seeks to identify successful cases of climate-smart agricultural practices. Participating stories must demonstrate their contribution to the three objectives of climate-smart agriculture: increasing productivity and food security, fostering processes for adapting to climate change, and reducing agriculture’s greenhouse gas emissions. To date, this initiative have resulted in several exemplary stories and demonstration projects.

The Disaster Vulnerability Reduction Project (DVRP), launched in December 2014, is a US\$68 million dollar initiative undertaken by the Government of Saint Lucia, in conjunction with the World Bank. The project aims to considerably reduce Saint Lucia’s risk to natural disasters in an era of climate change.

A critical component of the DVRP is a Climate Adaptation Financing Facility (CAFF). The US \$5 million facility is expected to be managed by the Saint Lucia Development Bank, SLDB.

The CAFF’s main goal is to provide loans at concessional interest rates to Saint Lucian households and businesses to undertake risk reduction projects and initiatives.

Strategic Objectives

- A. Elaboration of the National Plan for Disaster Management with a special focus on agriculture disaster and risk reduction and preparedness
- B. Development of a comprehensive Strategic Program for Climate Resilience with special emphasis on the establishment of effective plant genetic resources and disaster response mechanisms
- C. Development of the appropriate legislative/regulatory framework, for proper environmental management, and institutional structures and systems for planning and responding to climate change.

- D. Strengthening national and community-level capacity for mitigation, management, and coordination response to natural hazards, and the effects of climate change.
- E. Protecting water supplies, soils and coastal zones and ensuring resilience to climate change
- F. Supporting Climate resilient Investment in the Agricultural Sector.(CAFF-Climate Adaptation Financing Facility)
- G. Protecting water supplies, soils and coastal zones and ensuring resilience to climate change

Policy Instruments

- Undertake public education and training program to increase awareness about the potential impact of climate change and climate variability on socio-economic development
- Development of the physical and human capacity to measure and monitor climate change impact on key economic and social development parameters.
- Incorporation of climate change relates factors into sustainable land use planning and spatial mapping.
- Development of a National Strategic Plan focused on Climate Change resilient agricultural practices.
- Duty and tariff relief and/or tax deductions for environmental resource protection and water-conservation equipment;
- Green award programs for hotels that display the best conservation practices or education program
- Market-based incentives to promote sustainable tourism
- Eliminate subsidies that promote housing and tourism development in high hazard areas
- Develop & implement integrated coastal management plans

3. SECTOR STRATEGY

3.1 Agricultural Sector Strategic Vision and Mission

Vision Statement

The Agricultural sector has always been an important contributor to the economy of St. Lucia. The steady decline in the contribution of Agriculture to National GDP over the past decade, has resulted in the decrease in the dependence of the rural population on agriculture as a source of livelihood and a steady rise in the national food import bill.

The Government of Saint Lucia is cognizant of the country's potential in terms of the revitalization of a vibrant agricultural sector that can meet the national food demands. It is within this context that the Vision statement for the Agricultural Sector is articulated below:

Vision

A Food and Nutrition Secured Nation, built on the platform of a Vibrant, Service-Oriented, Stakeholder Focused, environmentally responsible Agricultural sector, and contributing to economic growth and development, and the improved and sustained quality of life of the people of Saint Lucia.

This articulated strategic vision for the Agriculture Sector in St. Lucia is achievable over the next decade within the context of a realistic and comprehensive Strategic Policy and Planning Framework that seeks to address the challenges and leverage on the opportunities within the sector.

Agriculture must remain a national priority and be supported by government through appropriate policies, at both macroeconomic and sector levels.

Agricultural Sector activities must be diversified and modernized, and every effort made for a private sector driven development focus.

Youth should be encouraged and empowered to play meaningful roles in the sector.

Agriculture will remain the gateway to rural development/transformation.

Our Mission

To Promote a diversified National Income base from agriculture, fisheries and to enhance food security and livelihood systems by generating the capacity for efficient and competitive production and marketing of goods and services.

Overall Goal

To enhance food security, increase employment and economic growth in the Agricultural Sector through the adoption of productivity enhancing technologies, sustainable use of natural resources, strengthening the delivery of agricultural support services and the effective implementation of agricultural policies and programmes through improved institutional and regulatory frameworks and human capacity building.

Core Values/Guiding Principles

The Strategic Action Plan aimed at achieving the identified **Mission** and realizing the defined **Vision** will be executed within the framework of the following **Core Values** and **Guiding Principles**:

- ***Policy Coherence***: Proposed Policies should be in coherence with relevant National, Regional and International policy commitments of the Government of Saint Lucia
- ***Vibrant Food Production Industries***: Proposed Policies should be aimed at creating strong, resilient and competitive businesses that are responsive to socio-economic changes, open to global opportunities and provide decent jobs and business opportunities, particularly for youth.
- ***Sustainability***: Recommended Policies should encourage and stimulate the efficient and sustainable use of natural resources, in particular land and water, in order to ensure continued future food production and the wellbeing of future generations
- ***Economically vibrant communities***: The development of primary agriculture and agro processing opportunities in communities would result in enhanced food security and income generation.

Strategic Planning Framework and Action Plan

Priority Area 1:

Agriculture Diversification- based on improved Research and Development improved technologies.

Strategic Goal: *To stimulate the effective and efficient diversification of the Agricultural sector through the promotion of improved production practices and the facilitation of appropriate Research and Development systems and practices, thereby contributing to the economic and environmentally sustainable production of identified non-traditional crops and livestock.*

#	Strategic Objectives	Action Agenda	Outcomes	Responsible/Support	Time Frame
A	<i>To promote the diversification of the Agricultural sector through the enhanced production of commodities such as: roots and tubers, tree crops vegetables and herbs and spices.</i>	A1. Identify critical production constraints and undertake research programme and activities in the field that are in responsive to these challenges;	- Critical production constraints identified and appropriate research program developed	Ministry of Agriculture (MOA), IICA and CARDI	2017-2019
		A2. Development of Opportunity Profiles highlighting the production and marketing advantages/opportunities linked to the production of various commodities with specific focus on cassava, cocoa and honey.	- Value chain analysis on various crops (Cassava, Cocoa, honey, etc) completed.		
		A3. Increase the availability and selection of improved cultivars and planting material at research stations;	- Readily available improved cultivars and planting material, distributed to farmers		
		A4. Increase small farmer production and productivity by the utilization of appropriate farm machinery;	- Increase production and productivity of identified commodities	MOA, FAO, Taiwanese Mission	2017-2020
		A5. Establish system of crop zoning based on suitability of soil types and growing conditions, with regards to optimizing crop yields, production and productivity;	- Crop zoning systems established for the 8 extension regions based on soils and other agro-climatic parameters.		
				MOA, FAO.	

#	Strategic Objectives	Action Agenda	Outcomes	Responsible/ Support	Time Frame
B	Facilitate greater investment in agricultural research and development to facilitate the development, acquisition, dissemination and utilization of improved and appropriate technologies such as Climate Smart Agriculture; Greenhouse technology development; Organic agriculture production; Water Storage/Irrigation development	<p>B1. Establishment and Operation of a National Diagnostic Facility to facilitate:</p> <ul style="list-style-type: none"> - strengthening of the national quality infrastructure in Saint Lucia; - testing of food and agricultural commodities; - testing of packages and packaging materials to ensure quality; and - development of a Saint Lucian quality mark and code of good practice that builds on the country's "natural" image and fair trade record. <p>B2. Focused and harmonized demand-driven research and development across national research institutions, with the collaboration of regional research institutions, based on national priority crop and</p>	<ul style="list-style-type: none"> - Demonstration Units established in key production areas. - Mechanisms and processes for technology transfer established and utilized. - Improvement in Farmer certification programs that enhance quality assurance - Export and local market potential enhanced / increased - Establishment of market driven research policies - Technologies and products developed in response to market needs - Establishment and operationalization of National Diagnostic Facility - Provision of efficient national diagnostic services - Demonstration Farms and adopt technologies resulting in farm improvements and increases in production/ quality of 	<p>MOA, St. Lucia Bureau of Standards (SLBS), IICA</p> <p>MOA, IICA, CARDI</p> <p>MOA, CARDI, IICA, Donors</p> <p>MOA, IICA, CARDI</p>	<p>2017-2021</p> <p>2017-2021</p> <p>2017-2020</p> <p>2017-2021</p> <p>2017-20</p>

#	Strategic Objectives	Action Agenda	Outcomes	Responsible/ Support	Time Frame
C.	<i>To strengthen the Institutional, human and technical resource capabilities of National Research and Extension, to facilitate the improvement of institutional structures and skills critical for the development and effective dissemination of new and existing technologies to stakeholders.</i>	<p>C1. Training programs in Good Agricultural Practices (GAPs) and GMPs for technicians, farmers and producers strengthened and expanded in order to achieve consistent, high quality, high yielding produce, which can increase farm profits and productivity (Agri-business viability)</p> <p>C2. Knowledge and skills of current extension officers enhanced through in-service training programmes and refresher/retooling programmes to target new technologies;</p> <p>C3. Recruitment and training of staff to enable the effective operation of the National Diagnostic Facility;</p>	<ul style="list-style-type: none"> - Improvement in the capacities of technicians, farmers and producers involved in the provision of services for / in the production and marketing of agricultural products - Knowledge, technical capacity and entrepreneurial ability of farmers and extension workers enhanced - Greater adoption and use of Good Agricultural Practices (GAPs) and GMPs by farmers resulting in increases in consistency, quality, produce yield, leading to increases in farm profits and productivity - Knowledge, production capacity and entrepreneurial 	MOA, CARDI, IICA, SLBS	2017-2021
D.	<i>To develop collaborative linkages with regional and international Agriculture Research</i>	D1. The development of collaborative relationships between the Ministry of Agriculture and regional and international institutions	<ul style="list-style-type: none"> - Greater synergies, sharing of ideas/experiences/information between the Ministry of Agriculture and regional and international institutions 	MOA, CARDI, CARIRI, CIRAD, and the Network of the National Laboratories	2018-2021

Strategic Planning Framework and Action Plan

Priority Area 2:

Resuscitation of the Banana Industry

Strategic Goal: *To facilitate the revitalization of an economically viable banana industry through the promotion of measures and practices aimed at ensuring the production of quality, cost effective products, which could be marketed competitively on the international markets.*

#	Strategic Objectives	Action Agenda	Outcomes/ Outputs	Responsible/ Support	Time Frame
A	The Development of a Banana Production Recovery Plan	<p>A1. Publicity Campaign to improve the profile of the Industry and to encourage reinvestment,</p> <p>A2. Continued Surveillance, Monitoring and Management of the Black Sigatoka disease by the Black Sigatoka Emergency and Stabilization Project Unit.</p>	<ul style="list-style-type: none"> - Improved disease monitoring and forecasting system - Improved management and distribution of chemical fungicides and mineral oil 	MOA, Black Sigatoka Management Unit, WINFRESH, NFTO, Donor Agencies such as the Taiwanese	2017-2020

#	Strategic Objectives	Action Agenda	Outcomes/ Outputs	Responsible/ Support	Time Frame
B	Improved Production Technologies for the production of bananas.	<p>B1. The introduction of production practices aimed at increasing productivity (anticipated yields of 11-12MT/acre), and reducing the cost of production.</p> <p>B2. Maintenance of effective drainage and irrigation systems; (Ongoing)</p> <p>B3. Facilitation of appropriate training for farmers;</p> <p>B4. Facilitate the availability of high quality (tissue culture) planting</p>	<ul style="list-style-type: none"> - Increased banana production and exports to regional and extra-regional markets - Improvement in timely access to agricultural water management services (irrigation) Off-farm drainage infrastructure/ services upgraded - Continuous capacity - building / strengthening of <i>agri</i>-extension personnel and the provision of 	MOA, Black Sigatoka Management Unit, WINFRESH, NFTO,	2017-2020
C	The identification of areas for improvement along the value chain and the development and implementation of mitigation measures to	<p>C1. Development and commercialisation of alternative end uses and by-products of bananas;</p> <p>C2. Conduct of market research to explore</p>	<ul style="list-style-type: none"> - Establishment of Agro-processing businesses utilizing banana by-products - Increase in the availability of market data for 	MOA, Black Sigatoka Management Unit, WINFRESH, NFTO,	2017-2020
D	The identification and development of market opportunities ((Regional and International) for primary and processed banana products.	<p>D1. Assessment of Regional and international market potential for products such as chips, jams, chutneys, baby foods and other value - added products;</p> <p>D2. Ensure production and post-harvest methods are in</p>	<ul style="list-style-type: none"> - Increase in the availability of information for decision making regarding the banana value chain (information on value added banana products) 		

#	Strategic Objectives	Action Agenda	Outcomes/ Outputs	Responsible/ Support	Time Frame
<i>E.</i>	The development and Strengthening of the required Institutional framework to support the production and marketing of bananas	<p>E1. The establishment of effective quality control systems;</p> <p>E2. The conduct of relevant seminars and training workshops for producers and extension workers</p> <p>E3. Strengthening of Farmers' Organisations;</p> <p>E4. Development of closer collaboration, contractual</p>	<p>– Quality of fruit production improved</p> <p>– Competency of Banana producers and extension workers in banana production and quality improved</p> <p>– Institutional and management capacity of banana producer</p>	Black Sigatoka Management Unit/ MOA/ CARDI	2017-2021

Strategic Planning Framework and Action Plan

Priority Area 3:

Enhanced Food and Nutrition Security

Strategic Goal: *To improve the Food and Nutrition Security status of the population of St Lucia by ensuring the availability of affordable food commodities through enhanced domestic food production; improving accessibility of the population to safe, affordable, and nutritious foods; and by promoting best practices in food utilization and improved nutrition.*

#	Strategic Objectives	Action Agenda	Outcomes/ Outputs	Responsible/ Support	Time Frame
A	Increased access to adequate and safe food supplies for the population;	A.1 Implementation of the FAO project Supporting the Development of the Fruits, Vegetables, and Roots and Tubers Value-chains in St. Lucia by Linking farm Families/ Small Farming to Markets	<ul style="list-style-type: none"> - Development of business models for linking family farms and farmers groups to government food procurement schemes (schools and institutions) and hotels developed; - Increased sales of agricultural produce from Farm Families/ Small Farmers in schools and other government institutions, and hotels 	MOA / UNFAO	2017-2018
..		A.2 Implementation of the relevant components of the Food Production Plan		MOA,	2017-2

#	Strategic Objectives	Action Agenda	Outcomes/ Outputs	Responsible/ Support	Time Frame
B	Improving national capacity for and conducting vulnerability mapping	B1. Instituting and facilitating training on how to conduct vulnerability mapping	– Government officers / technocrats trained and empowered in conducting vulnerability mapping	MOA, IICA, CARDI, FAO	2018-2020
C	Improved consumer protection through improve food quality and safety.	C1. Facilitate policies and strategies that enforce food safety and food quality assurance	– Strategies and policies developed to enforce food quality and safety – Food safety and food quality	MOA, MOH, SLBS	2018-2021
D	Improved nutritional status of the population through consumption of healthy foods.	D1. Promotional activities to encourage healthy eating and preparation of healthy foods	– Mass media advertising and food preparation training in agrarian/fishing community in supplying healthy foods	MOA, MOH, SLBS	2018-2021
E	Implementation of a Biosafety Framework for Agricultural products	E1. Strengthen national agricultural health and food safety systems and infrastructure for Bio safety in alignment with the Caribbean Agricultural Health and Food Security Agency (CAHSFA)	– Completion/ operationalizing of GMO lab/food technology and enactment of biosafety legislation for national health and food safety systems – Administrative Systems and regulations for importation of	MOA, Ministry of Sustainable Development, IICA, SLBS, MOH	2017 - 2021

Strategic Planning Framework and Action Plan

Priority Area 4:

Reduction in the Food Import Bill

Strategic Goal: *To create the enabling environment that would facilitate the increased production of competitively prices, quality local agricultural commodities, thereby facilitating the reduction in Food Imports, through the increased consumption of locally produced primary and processed foods.*

#	Strategic Objectives	Action Agenda	Outcomes/ Outputs	Responsible/ Support	Time Frame
A	The increased production, marketing, consumption and utilization of locally produced agricultural commodities	A1. Implementation and sharing of the positive experiences of Initiatives such as <i>The Fruit and Vegetable Demonstration and Extension Cooperation Project</i> , aimed at increased domestic production of commodities such as cabbage, lettuce, tomato, sweet pepper, cucumber, dasheen, sweet potato, yam and plantain. Promote technical collaboration and appropriate knowledge transfer	<ul style="list-style-type: none"> - Increased domestic production of fruits and vegetables via implementation of Fruit and Vegetable Demonstration and Extension Cooperation Project - Reduction in the food import bill as a result of increased local production of crops - Increased number of Farmers participating in (Massy Stores) Farmer Certification Programme 	MOA, IICA, CARDI	2017-2019
		A2. Continued support and strengthening of Massy Stores Farmer Certification Programme	<ul style="list-style-type: none"> - Increased use of local produce over imported 	MOA, Ministry of Education, Ministry of Health, Ministry of Home Affairs, IICA	2018-2020
B	Ensuring that the legislative framework and required institutional structures and measures are in place to promote and facilitate the increased consumption of locally produced primary and processed foods.	B1. Increase import duties and tariffs on specific food items;	<ul style="list-style-type: none"> - Legislation, policies and administrative systems for Increased import duties and tariffs on specific food items developed after due review and consultation with relevant regional and international bodies such as CARICOM, WTO 	MOA, Department of Legal Affairs, Attorney General's Office, Ministry of Commerce	2018-2020
		B2. Promotion by the Public and Private sector of the "Eat local and healthy" Campaign- Eat Fresh, Buy Local			2017-2019

Strategic Planning Framework and Action Plan

Priority Area 5:

Agro processing and Agribusiness Development

Strategic Goal: To

develop a highly competitive Agro processing and Agribusiness sub-sector supported by an enabling environment that will facilitate the establishment, growth and sustainable development of viable agro-industrial enterprises and cottage industries.

#	Strategic Objectives	Action Agenda	Outcomes/ Outputs	Responsible/ Support	Time Frame
A	To develop a framework for providing required technical and financial support to SME Agro - Food	A1. Needs assessment/ review of sub sectors A2. Prioritization of needs assessment. A3 Development of a Strategic Planning	<ul style="list-style-type: none"> - Gaps and areas of required support identified within the agro-processing sector ; - Strategic Planning Framework developed 	Ministry of Agriculture (marketing unit)	2017
B	To facilitate the provision of required infrastructure, equipment, packaging material, etc. required for the development and enhance processing	B1. Reviewing and improving the process for the incentive regime to include specifics, such as capital and operating cost, the timeliness of approval by allowing the	<ul style="list-style-type: none"> - Reduced operation cost. - Increase profitability - Better market access. - A reduction in food import bill. 	Ministry of Agriculture and stakeholders.	2017-2018

#	Strategic Objectives	Action Agenda	Outcomes/ Outputs	Responsible/ Support	Time Frame
C.	Promotion of agri-business opportunities among stakeholders (agro-processors) through various capacity building initiatives including training in food safety standards, standards for certification of	C1. Review and upgrade of existing training programmes in the areas of food safety, and processing. C2. Implementation & monitoring and continuous evaluation. C3. Sensitization and educational	<ul style="list-style-type: none"> - Certificate to meet required standards - Improve consistent natural farming practices. - Improve product standards. 	Ministry of Agriculture Cooperatives	2017
D.	To develop a production and marketing network involving suppliers, producers, marketers, financiers and buyers that will	D1. Strengthening and formation of clusters of small-medium scale agro processors, D2. Development of linkages along the	<ul style="list-style-type: none"> - Easy access to markets, products and information throughout the value chain. 	MOA Cooperatives, Ministry of Trade	2017
E.	To organize existing Agro-processing facilities for use as incubators to accommodate the development of the selected agro processing enterprises. (These facilities are the Anse Ger Agro-Processing Facility for Rural Women	E1. The establishment of effective management systems (including public/private partnerships) to facilitate the efficient utilization of these	<ul style="list-style-type: none"> - Efficient management and operation systems developed operations 	MOA & Stakeholders	2017

Strategic Planning Framework and Action Plan

Priority Area 6:

Market Development- Domestic and Expo

Strategic Goal: *To promote the development of effective and efficient systems and mechanisms for the marketing of locally produced agricultural commodities and by-products on the domestic, regional and international markets*

#	Strategic Objectives	Action Agenda	Outcomes/ Outputs	Responsible / Support Entities	Time Frame
A	To develop and enforce the required policies and legislations that would create the development of a safe and efficient market and trade environment. 2017-2018	A1. The government to facilitate the development of the required trade facilitation policies and legislations for the a sector, including: – Facilitating the creation of production clusters and fostering the	– Increase Opportunities for the marketing of locally produced products.	MOA/SLMB/ Farmers/ farmers group	2017
B	Restructuring and Revitalization of the St. Lucia Marketing Board.	B 1 . Develop a strategic plan for the restructuring and utilization of of the St. Lucia Marketing Board	Strengthening of market opportunities both locally and overseas	MOA/MOF/ Farmers groups/major stakeholders	2017-2018

#	Strategic Objectives	Action Agenda	Outcomes/ Outputs	Responsible / Support Entities	Time Frame
C.	To establish agricultural marketing information systems and cost of production databases in order to provide vital information for production planning and marketing.	C1. Market research and promotion that will identify new trends in markets and competitors and to identify new opportunities and to detect threats to the marketing of agricultural	Establish a marketing and research department within the established entities	Established entity	2017-2018
D.	To provide the necessary marketing infrastructure to effectively and				
E.	To meet the domestic, regional and international market requirements by adhering to quality, grades and standards established by the	E1. Establish continuous training E2. Develop programmes that will assist farmers to adhere to standards and	Increase produce which conforms to marketing standards	Farmers / MOA / SLMB	2017-2018
F.	Strengthening Producers' Organizations to facilitate greater collaboration in production	F1. F2.			
G.	Strengthen linkages between agriculture and other sectors, in particularly tourism,	G1. G2.			

Strategic Planning Framework and Action Plan

Priority Area 7:

The Development of appropriate institutional structures, mechanisms and capacities within the Agriculture Sector Institutions, including linkages with Regional and International)

Strategic Goal: *To strengthen and develop the Institutional and Human Resource Capacity and Framework of the Agricultural Sector by fostering improved capacity for policy formulation and governance; establishing effective and efficient public sector frameworks in agricultural planning, coordination, monitoring and evaluation, strengthening civil society organizations; and by encouraging effective Public-Private Partnerships.*

#	Strategic Objectives	Action Agenda	Outcomes/ Outputs	Responsible/ Support	Time Frame
	Establish a functional, efficient and effective public sector support framework for the agricultural sector to ensure appropriate, coordination, planning, service delivery, monitoring and evaluation.	A1. Strengthening capacity within the Ministry of Agriculture, in order to ensure more effective and efficient technical support especially for policy development, strategic planning, implementation, coordination, resource	<ul style="list-style-type: none"> - Information sharing and transparency may impact on making work more efficient. - Better collaboration and ownership of initiatives. - Staff morale improved - Better use of resource, more 	Permanent Secretary MOA Human Resource Public service	
B	To strengthen and further development the human resource and organizational capacities of supporting institutions, particular farmer's	B1. Institutional strengthening and capacity building of the co-operative department and co-operative sector	<ul style="list-style-type: none"> - Better service delivery - Improved image - Trust in the regulatory process - Cooperative model to be ideal in regulations. 		

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Priority Area 8:

Increased youth and women involvement in Agriculture

Strategic Goal: To facilitate the long-term development of the agriculture sector in St Vincent and the Grenadines by creating the enabling environment and opportunities that will stimulate the increased involvement of youth and women in agriculture production and agribusiness enterprises.

#	Strategic Objectives	Action Agenda	Outcomes/ Outputs	Responsible/ Support	Time Frame
A	The promotion and further development of the Youth Agri-Entrepreneurship Programme (YAEP)	<p>A1. Review of programme implementation strategies aimed at identifying areas for improvement and further development;</p> <p>A2. Sourcing of additional funding for the future expansion of the programme</p> <p>A3. Continue the implementation of programme activities including:</p> <ul style="list-style-type: none"> - The Provision of access to equipment and machinery; - Provision of access credit 	<ul style="list-style-type: none"> - Intermediary between farmers and financial institutions. (central financing body for credit unions) - Expansion plan of primary cooperatives can be realized. - Self-sustainable 	MOA/ Stakeholders	2017-2018

#	Strategic Objectives	Action Agenda	Outcomes/ Outputs	Responsible/ Support	Time Frame
B	Creating the enabling environment to ensure that Agribusiness is seen as a viable career option for young people, including women	<p>B1. Agricultural Education and Training Programmes given priority attention as part of the Primary and Secondary schools' curriculum, as well as vocational training.</p> <p>B2. Greater promotion and exposure of young people to improved agribusiness production technologies and systems.</p> <p>B3. Developing the mechanism and the platform for the sharing and</p>	<ul style="list-style-type: none"> - Youth empowerment. - Sustainability of the agricultural sector - Better succession plan - Subsidizing school feeding program - Shared experiences. - Synergies / business opportunities. - Knowledge and guidance of regional protocols 		

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Priority Area 9:

Effective management and utilization of Fisheries

Strategic Goal: *To optimize the socio-economic benefits of fisheries sector through the introduction of measures and programmes that would contribute to the effective management, conservation, sustainable utilization of available fisheries and living marine resources.*

#	Strategic Objectives	Action Agenda	Outcomes/ Outputs	Responsible/ Support	Time Frame
A	To ensure that fish stocks and the structural habitats on which they depend are managed sustainably, maintaining their characteristic structure and function, productivity and diversity, through the establishment of appropriate and cost-effective controls.	<p>A1. Enhance the enforcement arm of the Department of Fisheries.</p> <p>A2 Develop an integrated database management system with critical fisheries and fisheries-related data.</p> <p>A3 Review and approve management and development plans for fisheries in the fishery waters in consultation with persons affected by the fishery plans.</p> <p>A4 Develop, disseminate and make publicly accessible scientifically-based communication material which</p>	<p>- Improved compliance mechanisms to manage the level of illegal and destructive fishing practises.</p> <p>- Upgraded fisheries data management system and to expand the register of information on primary stakeholders towards improved reliability and quality of data for decision-making.</p> <p>- Defined</p>	<p>DOF/RSLPF, Praedial Larceny officers, DPP Office,</p> <p>DOF/ Corporate Office, CRFM, FAO, Government Statistics and Central IT.</p> <p>DOF/ Environmental Health, Coastal Zone Management Unit, Water resource management Unit,</p>	<p>2017-2018</p> <p>NOW!</p> <p>2017 – 2019</p> <p>(phased approached)</p>

#	Strategic Objectives	Action Agenda	Outcomes/ Outputs	Responsible/ Support	Time Frame
B ..	The introduction of measures to facilitate the improved production, harvesting and supply of quality fish and fisheries products.	<p>B1. Ensuring the supply of farm farm/fishing inputs which are required for the production and distribution of fisheries products including, ice, ice boxes, aquaculture feed, fish farming equipment, crates, etc.);</p> <p>B2. Retrofitting of existing fishing vessels to carry ice to sea</p> <p>B4. Provide continuing education opportunities with an emphasis on training and courses that will be essential tools to increasing</p>	<p>- Compliance with sanitary and phytosanitary (S P S) standards as well as occupational health and safety standards within the fishing industry.</p> <p>- Increase compliance with industry standards and adherence to best fishing practices.</p> <p>- Improved fisheries products and ease of fishing from point of harvest to point of sale.</p>	<p>DOF/ Bureau of Standards, Fishers, Min. of Health, WRMA.</p> <p>DOF/ TVET unit, Environmental Agencies, Maritime Division, maritime private sector agencies</p>	

#	Strategic Objectives	Action Agenda	Outcomes/ Outputs	Responsible/ Support	Time Frame
C.	The upgrade of the structures, facilities, equipment and management of the St. Lucia Fish Marketing Cooperation (SLFMC) in compliance with required public health and HACCP standards.	<p>C1. Endorsing and implementation of the SLFMC Development Plan</p> <p>C2. The implementation of improved organizational management practices to ensure:</p> <ul style="list-style-type: none"> - Management/ marketing information systems for timely decision-making. - Appropriate financial management systems and practices; - Adequate staff to ensure enforcement of fisheries regulations compliance of food safety and quality management standards; - Develop training programme and train personnel in food 	<ul style="list-style-type: none"> - Increased consumption of locally produced fish and seafood products; - Improved quality of fish and seafood products sold to the hotels and the tourism sector; - Market confidence in the safety of fish and fish products enhanced. 		

Strategic Planning Framework and Action Plan

Priority Area 10:

The protection, conservation and sustainable utilization of natural

Strategic Goal: *To ensure the protection, conservation and sustainable utilisation of natural resources that forms an integral component of the Agriculture, Forestry and Fisheries Sector.*

#	Strategic Objectives	Action Agenda	Outcomes/ Outputs	Responsible/ Support	Time Frame
A	Manage water resources in an efficient, sustainable and equitable manner	<p>A1. Undertake spatial mapping of all water on the island and develop a profile for each of the water resources</p> <p>A2. Develop a water master plan and allocation scheme</p> <p>A3. Develop guidelines for preparing watershed management plans</p> <p>A4. Create watershed management plans for priority watersheds</p> <p>A5. Conduct investigative studies on alternative water management</p>	<p>– 20% of all water sources on the island mapped by 2017</p> <p>– Water master plan and allocation scheme developed by 2018</p> <p>– Guidelines for watershed management planning to be developed by 2018</p> <p>– At least 2 watershed management plans developed by 2018</p> <p>– At least one study on alternative</p>	<p>Lead agency: WRMA</p> <p>Internal partners: NWSC, WASO, SDED, Forestry</p>	2017-2020

#	Strategic Objectives	Action Agenda	Outcomes/ Outputs	Responsible/ Support	Time Frame
B.	Facilitate exploration of renewable water and energy sources	B1. Research alternative sources of water including groundwater and non-traditional sources	<ul style="list-style-type: none"> - Identification of sites for potential groundwater abstraction by 2017 - Research on potential for 	<p>Leads: WRMA for water and EST for energy</p> <p>Internal partners: WASCO and</p>	
C.	Promote efficiency and sustainability in water abstraction, harvesting and delivery	<p>C1. Review and approve applications for abstraction licences and water control permits</p> <p>C2. Develop and update guidelines for defining water control areas</p> <p>C3. Design water conservation programme</p> <p>C4. Promote rainwater harvesting</p> <p>C5. Upgrade Information systems:</p> <p>C6. Geographic Information System (GIS)</p> <p>C7. Customer Information System (CIS)</p> <p>C8. Network modelling</p> <p>C9. Non Revenue Water (NRW) reduction</p> <p>C10. Groundwater exploration</p> <p>C11. Establishing District Metering Areas (DMA)</p> <p>C12. Operationalizing</p>	<ul style="list-style-type: none"> - 65% of applications for licences and permits received per annum to be reviewed - Review of existing licences and permits - Guidelines developed for defining water control areas by 2017 - Water control areas published in Gazette by 2017 - Water conservation programme designed and implemented by 2017 - Implementation of established guidelines (CEHI) for rainwater harvesting - Incentives for rainwater harvesting implemented by 2015 and 	<p>Lead: WRMA</p> <p>Internal partners: Forestry, WASCO, SDED, PUD, NW</p>	

#	Strategic Objectives	Action Agenda	Outcomes/ Outputs	Responsible/ Support	Time Frame
D.	Promote recycling of wastewater for efficiency in water use	D1. Promote wastewater reuse in agriculture D2. Improve efficiency of treatment process at Beausejour Plant	– Policy developed and implemented for wastewater reuse in agricultural	Lead: WRMA Internal partners: WASCO, NWSC	
E.	Promote appropriate wastewater technologies	E1. Carry out research into wastewater technologies for improved effluent quality; E2. Develop and	– Research conducted regarding improved wastewater technologies and service by 2018	Lead: WRMA Internal partners: WASCO (CReW focal	
F.	Maintaining a healthy ecosystems with sustainable thriving species;	F1. Preparation of a comprehensive Biodiversity Plan F2. Prepare draft regulations and laws for implementing the National Alien Invasive Species Strategy. F3. Develop regulations for the Wildlife Act and review and revise regulations	– Enhanced populations of threatened, endemic species and sub-species, inside and outside the Forest Reserve. – Impacts of alien invasive species on priority species, habitats and ecosystems are eliminated or substantially	Forestry Biodiversity Unit, Attorney General's Office	2017-2022 (5 years)

#	Strategic Objectives	Action Agenda	Outcomes/ Outputs	Responsible/ Support	Time Frame
G.	Ensuring sustainable flows of products that support both local economies and biodiversity conservation	<p>G1. Conduct a study on the alignment of forest management in Saint Lucia with the international criteria and indicators of the Montreal Process of the United Nations Forum on Forests (UNFF).</p> <p>G2. Prepare a programme for formal adoption of Sustainable Forest Management in Saint Lucia (as defined by the UNFF).</p> <p>G3. Encourage and support initiatives for sustainable production of charcoal.</p> <ul style="list-style-type: none"> - Conduct study on demand and feasibility. 	<ul style="list-style-type: none"> - The alignment of Forest management in Saint Lucia With international standards for Sustainable Forest Management. - Sustainable non-timber forest product (NTFP) projects are delivering benefits to local communities and the wider economy. 	Forestry Community Groups, Farmers, Agriculture Extension, Fauna and Flora International	2017-2027 (10 years)
H.	Improve and promote public awareness and education by means of public tours and visitation, and	H1. Develop a range of specific packages for Saint Lucians to visit and learn about the forests and their wildlife.	<ul style="list-style-type: none"> - Awareness is raised across all stakeholder groups about biodiversity, and sustainable 	Forestry Communication Unit, Private Consultant	2017-2020 (3 years)
I.	To develop and implement a comprehensive land-use plan, thereby ensuring the availability of quality lands for Agriculture through land zoning, and	I1 Strengthening of land use legislation and demarcation of productive uses based on land capability;	<ul style="list-style-type: none"> - Land inventory - Identification of abandoned farmlands - Identification of suitable crown lands 	MOA/ Physical Planning	2017-2020

#	Strategic Objectives	Action Agenda	Outcomes/ Outputs	Responsible/ Support	Time Frame
J.	Ensure the availability and accessibility of quality agricultural land and water resources through investment (public and private sector) in required infrastructure.	J1. Improved and rationalize road infrastructure including farm roads network.	<ul style="list-style-type: none"> - Review legislation and existing policies related to land management, acquisition and land use - Facilitate the development of a 	MOA/ Physical Planning / Ministry of Infrastructure	2017-2020

Strategic Planning Framework and Action Plan

Priority Area 11:

Disaster Risk Reduction and Climate Change Ad

Strategic Goal: *To strengthen resilience of the Agriculture, Forestry, and Fisheries sectors to disaster and climatic risks, thereby ensuring the long-term contribution of these industries to National Development*

#	Strategic Objectives	Action Agenda	Outcomes/ Outputs	Responsible/ Support	Time Frame
A ..	Elaboration of the National Plan for Disaster Management with a special focus on agriculture disaster and risk reduction and preparedness	A 1. Stakeholder consultation to help develop and validate Plan	National Plan for Disaster Management	MOA / Department of Agriculture, NEMO(National Emergency	2017-2020

#	Strategic Objectives	Action Agenda	Outcomes/ Outputs	Responsible/ Support	Time Frame
B "	Development of a comprehensive Strategic Program for Climate Resilience with special emphasis on the establishment of effective plant genetic resources and disaster response mechanisms	<p>B1. Develop mechanisms to ensure irrigation and protected agriculture</p> <p>B2. Collaborate with insurance providers to ensure all farmers have insurance against disasters.</p> <p>B3. Facilitating access to climate change resistant genetic resources</p> <p>B4. Development of early warning systems</p> <p>B5. Alternate water sources</p>	<p>– Enabling environment created for farmers to get access to irrigation and greenhouses</p> <p>– Establishment of farm insurance provision mechanism</p> <p>– Providing the system that allows access to saline resistant plants and drought resistant planting materials/ livestock.</p> <p>– Establishment of early warning systems</p> <p>– Ground water and rain water harvesting</p>	<p>MOA / Department of Agriculture, CARDI, IICA</p> <p>MOA / Department of Agriculture, CARDI, IICA</p> <p>MOA / Department of Agriculture, CARDI, IICA</p>	<p>2018 – 2020</p> <p>2018 – 2020</p> <p>2018 – 2021</p> <p>2018 – 2019</p>
C.	Development of the appropriate legislative/ regulatory framework, for proper environmental management, and institutional structures and systems for planning and responding to climate change.	C1. Stakeholder consultation to help develop and validate legislation that is linked to MEAs.	<p>– Stakeholder validation workshop</p> <p>– Legislation completion</p>	AG Office, MOA / Department of Agriculture, CARDI, IICA	2018 – 2019

#	Strategic Objectives	Action Agenda	Outcomes/ Outputs	Responsible/ Support	Time Frame
D	Strengthening national and community-level capacity for mitigation, management, and coordination response to natural	D1. Development of Sensitization, awareness and education communication system for climate change	- Increased number of newspaper articles on climate change being published by the various media houses (Effects of climate changes,	MOA / Department of Agriculture , CARDI, NTN(National	2017 - 2019
E.	Protecting water supplies, soils and coastal zones and ensuring resilience to climate change	E1. Preparation of management plans and management of the following watersheds: the Bois d'Orange watershed; the Vieux Fort watershed; the Fond D'Or watershed; and the Roseau watersheds.	- Management strategies and plans are in place for all priority watersheds.	MOA / Department of Agriculture , CARDI,	2017 - 2020
		E2. Implementation of measures and programmes for reforestation/ forest restoration in vulnerable locations (along primary watercourses, upper area of water catchments and vulnerable slopes, including farmlands)	- Effective measures are in place for forest protection, restoration and management.	MOA / Department of Agriculture , CARDI,	2017 - 2019
		E3. Train of technicians in the latest techniques, technologies and approaches for forest establishment, management and restoration	- Coastal wetlands and mangroves are under effective protection and managed sustainably.	MOA / Department of Agriculture ,	2017 - 2018
		E5. Establish a programme to research, test and promote agroforestry on farmlands.		MOA / Department of Agriculture , CARDI	2017 - 2019
				MOA /	2017 - 2018

ANNEXES

ANNEX 1:

KEY ELEMENTS OF THE REGIONAL FOOD AND NUTRITION SECURITY POLICY AND ACTION PLAN

Historically, as a region and at the national level, CARICOM Member States have been trying to separately address the issues relating to the different dimensions of food and nutrition security (*food availability; food access; proper food utilization for good health, nutrition and wellbeing; and stable and sustainable food supplies at all times*). These efforts have resulted in a mix of policies that have had limited impact. The decision emanating from CARICOM's Liliendaal Declaration (July 2009) therefore mandated an integrated, multi-sector and regional approach for the achievement of food and nutrition security. Food and nutrition security was seen as a multi-dimensional and multi-sector issue that requires simultaneous, holistic and concerted action in a number of areas including the production of food (agriculture, fisheries and forestry), food processing and distribution, health and nutrition, trade, infrastructure, social welfare, education and information and communication.

The Regional Food and Nutrition Security Policy and Action Plan (RFNSPA) seeks to provide a clearly articulated, holistic policy and implementation framework (for the period 2011-2025) that will guide the design, implementation and monitoring of specific future national and regional strategic programmes to address the major food and nutrition security challenges in CARICOM.

*The policy provides a coherent, convergent and comprehensive framework within which national governments, civil society and private sector actors can join forces with regional organizations and development partners in cross-national, multi-sector and synergistic partnerships to identify, finance, implement and monitor an integrated set of concrete actions to achieve the four objectives of: **food availability; food access; proper food utilization for good health, nutrition and wellbeing; and stable and sustainable food supplies at all times.***

**SUMMARY OF THE STRATEGY FRAMEWORK OF THE REGIONAL FOOD AND NUTRITION SECURITY
OVERALL GOAL, GOALS AND OBJECTIVES**

Overall Goal:

To ensure long-term Food and Nutrition Security and the enjoyment by all in the CARICOM Member States of the 'right to food'

Goal 1:

Promote the sustainable production, of safe, affordable, nutritious, good quality Caribbean food commodities/products.

Goal 2:

Ensure access of Caribbean households, especially the poor and vulnerable, to sufficient nutritious and affordable food at all times.

Goal 3:

Improve the nutritional status of the Caribbean population, by the promotion of and commercialization and consumption of safe, affordable, nutritious quality Caribbean food commodities/products.

Objectives:

- To promote increased availability of regionally produced nutritious food at competitive market prices.
- To improve production and productivity of the identified food crops and livestock commodities.
- To increase the cost efficiency of value added production for regionally produced
- Create an enabling environment for the production and marketing of local foods
- Formulation and implementation of land and water resource management

Objectives:

- Improving access of the poor and vulnerable in CARICOM Member States to Livelihood Assets
- Improve the Regional Food Distribution System

Objectives:

- Promote, support and Protect appropriate infant and young child feeding practices.
- Diversification of food production in line with regional population dietary goals.
- To Support the Development of Early Childhood Learning Centres, primary and secondary schools as an entry point for interventions with children to prevent and control some of the identified nutrition conditions and influence food tastes and preferences.
- Review of the existing regional food standards relating to food safety, nutrition, labelling and to identify and remedy deficiencies in their development, implementation and enforcement so as to promote greater intra-regional trade.

ANNEX 2: LIST OF STAKEHOLDERS ENGAGED AS PART OF THE CONSULTATION PROCESS (30th May – 1st June 2016)

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NAME	DESIGNATION	ORGANISATION	CONTACT	EMAIL
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