

# Vanuatu Agritourism Plan of Action



December 2016



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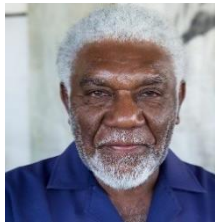
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## Acronyms

APTC	Australia-Pacific Technical College
ASC	Agritourism Steering Committee
CTA	Technical Centre for Agricultural and Rural Cooperation
DFAT	Department of Foreign Affairs and Trade
DoF	Department of Finance
DOT	Department of Tourism
DSPPAC	Department of Strategic Policy Planning and Aid Coordination
FAO	Food and Agriculture Organisation of the United Nations
FSA	Farm Support Association
GDP	Gross Domestic Product
GoV	Government of Vanuatu
IFAD	International Fund for Agricultural Development
IFC	International Finance Corporation
IICA	Inter-American Institute for Cooperation on Agriculture
IVS	International Visitor Survey
MALFFB	Ministry of Agriculture Livestock Forestry Fisheries and Biosecurity
MTTCNVB	Ministry of Tourism, Trade, Commerce and Ni-Vanuatu Business
MoH	Ministry of Health
NCW	Vanuatu National Council of Women
OPSP	Overarching Productive Sector Policy
PAA	Priority Action Agenda
PHAMA	Pacific Horticultural and Agricultural Market Access Program
PIPSO	Pacific Islands Private Sector Organisation
PMO	Prime Minister's Office
POETCom	Pacific Organic and Ethical Trade Community
PSSC	Productive Sector Steering Committee
SfEG	Skills for Economic Growth Project
SPC	The Pacific Community (formerly Secretariat of the Pacific Community)
SPTO	South Pacific Tourism Organisation
TPF	Trade Policy Framework
T MDF	Tourism Market Development Fund
TVET	Technical Vocational Education and Training
VAC	Vanuatu Agriculture College
VAPA	Vanuatu Agritourism Plan of Action
VARTC	Vanuatu Agricultural Research and Technical Centre
VCCI	Vanuatu Chamber of Commerce and Industry
VNSO	Vanuatu National Statistics Office
VTO	Vanuatu Tourism Office

VTOA	Vanuatu Tour Operators Association
VQIS	Vanuatu Quarantine Inspection Service/Biosecurity Vanuatu
VSTAP	Vanuatu Strategic Tourism Action Plan
VTSP	Vanuatu Tourism Support Programme
WTO	World Trade Organisation

## **Honourable Deputy Prime Minister and Minister of Tourism, Trade, Industry, Cooperatives & Ni-Vanuatu Business Development.**



It gives me great pleasure to present to you this Vanuatu Agritourism Plan of Action which has been prepared by the Ministry of Tourism, Trade, Commerce and Ni-Vanuatu Business and the Ministry of Agriculture, Livestock, Forestry, Fisheries and Biosecurity to provide guidance and direction for the implementation of appropriate actions to strengthen the linkages between agencies under the two Ministries.

For the MTTCNVB agencies the linkages and partnership will focus mainly on the objective for increasing the production of value added products based on primary commodities that will be produced, or so to speak, by agencies under MALFFB. Reports that have been produced in the past have shown, in the handicraft industry for example, that about 90% of all products that are sold by mamas to tourists are imported. Likewise for the foods that are consumed by tourists while in Vanuatu that a very high proportion of these are imported foods. So this Vanuatu Agritourism Plan of Action is the first step to strengthen partnership with all partners to increase the production of value added products for both the domestic and export markets.

We must be proactive and be innovative in progressing the development of our country towards the realisation of the long term vision of a stable, sustainable and prosperous Vanuatu. We must explore import substitution, where feasible and expand the tax base of the economy through a progressive transfer of ni-Vanuatu businesses from the informal sector to the formal sector, from the MSME to the larger businesses and increase the participation and contribution of the rural population in the national economic agenda of the country.

We have been preaching value addition for the last thirty six years without really achieving anything tangible to show for it. So as Minister responsible for tourism, trade, commerce and industry I want to achieve through this plan tangible outcomes that I can show how we have been able to achieve expected levels of value addition in Vanuatu. That we have been able to increase the spending of tourists on local products from current levels to a 50% increase, that when you take your family to a Chinese restaurant that you will be able to eat locally farmed Peking ducks, buy locally made noodles from manioc flour and drink healthy fruit juices that were produced from Vanuatu orchards. Only then would the Ministry be truly successful in facilitating value addition in Vanuatu.



**Hon Joe Natuman  
Deputy Prime Minister and  
Minister for Tourism, Trade, Commerce and Ni-Vanuatu Business**

## Honourable Minister of Agriculture, Livestock, Fisheries, Forestry and Biosecurity.



It is a pleasure to present to you this Vanuatu Agritourism Plan of Action that has been prepared by the MTTCNVB and MALFFB to guide the two Ministries to provide direction in increasing the production of primary commodities to support economic activities in the country.

During the early days after independence in the 1980s agriculture was the main foreign exchange earner for the country however today this is no longer the case and it is important that government is serious about elevating this status because the increasing production of goods will positively contribute to reducing leakages from the economy. As Minister for MALFFB I want to increase the production of the main primary commodities in the country such as coconut, cocoa, coffee, beef, fish, small livestock, root crops and fruits and vegetables for both local consumption and also for exports.

This plan will also strengthen the linkages between agriculture and tourism because tourism is a very important market for agriculture production such as fruits and vegetables, beef, fish and a whole package of other products. But the need to strengthen linkages is not only important between agriculture and tourism but to all sectors of the economy because our country depends on it. For too long now agencies in government have compartmentalised their services and spent too much time in castle building without really contributing positively to making a difference in the growing of the economy and improving lives in the islands. I want to make this difference through this plan to get all agencies in government to work together to facilitate an increase in the production of primary commodities as well as improve the lives of families throughout the islands through the services of agencies under the Ministry because the future of our country depends on it.

This Vanuatu Agritourism Plan of Action is for me the implementation schedule for the Agriculture Sector Policy especially to increase the production of primary commodities for both the domestic and export markets. We in government have always claimed that agriculture is the mainstay of the majority of the population of this country – I challenge you to join me to prove it through this plan.

I want to see the island of Tanna to be the leader in the production of vegetables and Arabica coffee; Santo and Malekula to be the leaders in cattle, cocoa, coconut, and Robusta coffee; Penama to be the leader in kava and so on. Can we achieve this through our partnership? I am tired of hearing people say that we are importing fish, beef and fruits and vegetables because there is not enough supply in country. So let us work together through this partnership under the Vanuatu Agritourism Plan of Action to increase production of all commodities that are important in the lives of rural families and the economy. And let us stop this statement that there is not enough supply in country.

Our farmers and fishermen also need to change and be real businessmen and women, register your farm as a business with the VFSC and operate as a business with proper accounting system and be audited annually because I want to see you all being transferred from the informal sector to formal sector and be counted as a business, not just as a rural farmer and a statistics in government reports. Only then would the Ministry be successful in elevating the status of agriculture in the economy because we are important as a business.



The image shows a handwritten signature in black ink on the left side. To the right of the signature is a circular official seal. The seal is blue and contains the text "REPUBLIC OF VANUATU" at the top and "REPUBLIQUE DE VANUATU" at the bottom, separated by two stars. In the center of the seal, it reads "MINISTER OF AGRICULTURE, LIVESTOCK, FORESTRY, FISHERIES & BIO-SECURITY".

Hon Matai Seremaiah Nawa  
Minister of Agriculture, Livestock, Forestry, Fisheries and Biosecurity

## 1. Introduction

### Background

Globally there is a growing awareness of the opportunities and benefits of strengthening the links between agriculture and tourism. The Government of Vanuatu and stakeholders from the tourism and agricultural sectors have recognised that agritourism has the potential to generate benefits for both sectors. Benefits include increased demand for local agricultural products, promotion of healthy and nutritious food, new and improved business and employment opportunities and income from value added tourism products.

Enhancing agriculture-tourism linkages capitalises on the ability of the tourism sector to diversify the local economy, stimulate investment and local business and assist in the wider development of rural communities.

The issue of strengthening the links between agriculture and tourism has been on the Vanuatu Government of Vanuatu agenda for some time. The goal to improve the value added from tourism is shared by Government of Vanuatu and other stakeholders in both the agriculture and tourism sectors.

### The Vanuatu Agritourism Plan of Action

In response to the growing opportunities from agritourism, the Government of Vanuatu (Government of Vanuatu) established an Agritourism Steering Committee (ASC) and with assistance from the New Zealand Aid Programme, initiated preparation of the Vanuatu Agritourism Plan of Action (VAPA).

The VAPA provides a framework for enhanced integration of tourism and the productive sectors including agriculture, fisheries and livestock. An Action Plan is included within this document showing priorities for implementation over the next five years.

TRIP Consultants<sup>1</sup> prepared the VAPA based on a participatory planning approach that included:

- A review of existing literature on agritourism in Vanuatu and the Pacific region
- Analysis of related agritourism initiatives and workshops supported by the Government of Vanuatu and other stakeholders such as the New Zealand Aid Programme, the International Finance Corporation (IFC), the Technical Centre for Agricultural and Rural Cooperation (CTA), the Inter-American Institute for Cooperation on Agriculture (IICA), the Pacific Islands Private Sector Organisation (PIPSO) and the Pacific Community (SPC)
- Preparation and distribution to stakeholders of a Situation Analysis Report on Agritourism in Vanuatu (July 2016)
- Stakeholder consultation and site visits on Efate, Santo and Tanna, as well as consultation on the initial recommendations at an Agritourism Planning Workshop (Port Vila - September 2016).

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<sup>1</sup> Led by Ross Hopkins in association with Ross Corbett



### Agritourism Definition

In its purest sense agritourism<sup>2</sup> refers to travel that combines rural settings with products of agricultural operations – all within a tourism experience that is paid for by visitors<sup>3</sup>. Food tourism has also been defined<sup>4</sup> as an experiential trip to a gastronomic region, for recreational or entertainment purposes. This includes visits to primary and secondary producers of food, gastronomic festivals, food fairs, events, farmers' markets, cooking shows and demonstrations, tastings of quality food products or any food products related to food.

In its broader sense agritourism encompasses linkages between agriculture and tourism, both through value added agricultural products and through food and beverage consumed by tourists. The latter broader concept of agritourism has been adopted for the purposes of the VAPA in order to maximize the benefits that can be delivered through the combined agritourism value chain.

The quality of cuisine and the range of culinary experiences is of critical importance to the overall quality of a holiday. Evidence from many regions demonstrates that over one third of tourist spending is devoted to food. In Vanuatu, it is estimated that visitors spent almost VUV3.2 billion on food and drinks in 2015<sup>5</sup> and a further VUV543 million in supermarkets. In the Vanuatu International Visitor Survey (IVS) 12 percent of people identified food and beverage as one of the least enjoyable parts of their visit to Vanuatu. This indicates a need to further improve food services. It is implied from the IVS that this also includes the quality and quantity of local produce consumed by visitors.

Key drivers influencing the growth in food tourism include:

- A growing demand for authentic, participatory tourism experiences
- Increasing interest in health and social awareness
- Increasing media focus on food and cooking through a multitude of cooking shows and other media
- Restaurants and accommodation providers increasingly recognising the importance of their own culinary offering as a competitive advantage
- Destinations increasingly recognising the importance of local cuisine as a key point of difference from other destinations.

The growth of interest in agritourism products is supported by recent research by the Travel Industry Association of America indicating that 60 percent of American leisure travellers are interested in taking a trip to engage in culinary activities within the next 12 months.

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<sup>2</sup> The terms Agritourism and Agrotourism are synonymous and used interchangeably in the literature.

<sup>3</sup> IICA/CTA/Caricom – Investing in Agrotourism in the Caribbean Region – Nov 2013

<sup>4</sup> CTA/IICA/Caricom – Investing in Agrotourism Development in the Caribbean region – Nov 2014

<sup>5</sup> Vanuatu International Visitor Survey 2014 – 2015 – NZTRI/AUT/IFC

## 2. Agritourism – Policy and Sector Overview

### Government of Vanuatu of Vanuatu Policies

The development of the VAPA is in line with the development objectives of the Government of Vanuatu of Vanuatu as set out in the Priority Action Agenda<sup>6</sup> and the overarching sector policies for the Productive Sectors<sup>7</sup>, Agriculture<sup>8</sup> and Tourism<sup>9</sup>. Vanuatu Strategic Tourism Action Plan (VSTAP) in particular identifies *‘the need to identify opportunities for import substitution and for increasing the economic contribution from tourism, particularly in agritourism as well as the further development of local handicrafts to strengthen sector linkages’*. The development of stronger linkages between the productive sectors and tourism is also in line with the Government of Vanuatu’s Trade Policy Framework<sup>10</sup>.

### Overview of the Vanuatu Agriculture Sector

Around 80 percent of Vanuatu’s population is dependent in some way on agricultural production and the sector contributes 28 percent to GDP<sup>11</sup>. The majority of producers are smallholders living in rural areas, with the sector contributing 71 percent to total rural household income<sup>12</sup>.

The Vanuatu Agriculture Sector Plan divides Vanuatu’s agriculture sector into three distinctive sub-sectors with the subsistence sector accounting for more than 75 percent of production and a growing semi-commercial accounting for 15 percent. An agriculture commercial subsector based on a range of traditional cash crops contributes to around 10 percent of the total agricultural production. The bulk of the semi-commercial subsector activities are located in and around the urban areas. The commercial agricultural subsector is dominated by four main traditional cash crops, namely coconut, cocoa, kava and coffee.

A recent study by FAO<sup>13</sup> found that whilst opportunities exist to increase the productive fruit and vegetable supply for domestic consumption there are a number of key barriers to be addressed. As indicated in the study *‘Improving the capacity of the agriculture sector to supply the domestic market with locally produced fresh fruit and vegetables fostering backwards and forwards linkages between the larger tourism and services sector of the economy and the agricultural sector will create new income generating opportunities for rural households and increased food security.... However, the limited capacity of the smaller semi subsistence agriculture sector to supply and satisfy the needs of the higher value domestic markets at prices competitive with imports, is a significant factor contributing to a higher level of food import dependence in Vanuatu’*.

In addition, the FAO study found that *‘To progress development in the F&V sector increased farm productivity will be reliant on farmers receiving good technical advice on improved crop varieties, husbandry practices and farm budgeting. To extend cropping seasons to include year round production will require, in addition to planting suitable varieties, the adoption of new farm practices including crop*

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<sup>6</sup> The Priority Action Agenda 2006 – 2015 – Government of Vanuatu

<sup>7</sup> Overarching Productive Sector Policy – Government of Vanuatu

<sup>8</sup> Vanuatu Agriculture Sector Policy – 2015 – 2030 – Government of Vanuatu of Vanuatu

<sup>9</sup> Vanuatu Strategic Tourism Action Plan 2014 – 2018 – Government of Vanuatu

<sup>10</sup> Trade Policy Framework – Government of Vanuatu 2012

<sup>11</sup> 2007 National Agricultural Census – VNSO and World Bank data - 2013

<sup>12</sup> 2010 Vanuatu Household Income and Expenditure Survey - VNSO

<sup>13</sup> 2015 – Vanuatu Fruit and Vegetable Sector Value Chain Analysis - FAO

*cover during the height of the rainy season, irrigation during drier periods and flower induction technology.....Furthermore, revenue yields could be improved through better crop planning and market linkages, as well as SPS and logistical challenges before F&V, fresh and processed products can be sustainably access higher value markets such as tourism food services.'*

A recent report commissioned by MFAT<sup>14</sup> indicates that similar constraints apply to the cattle sector.

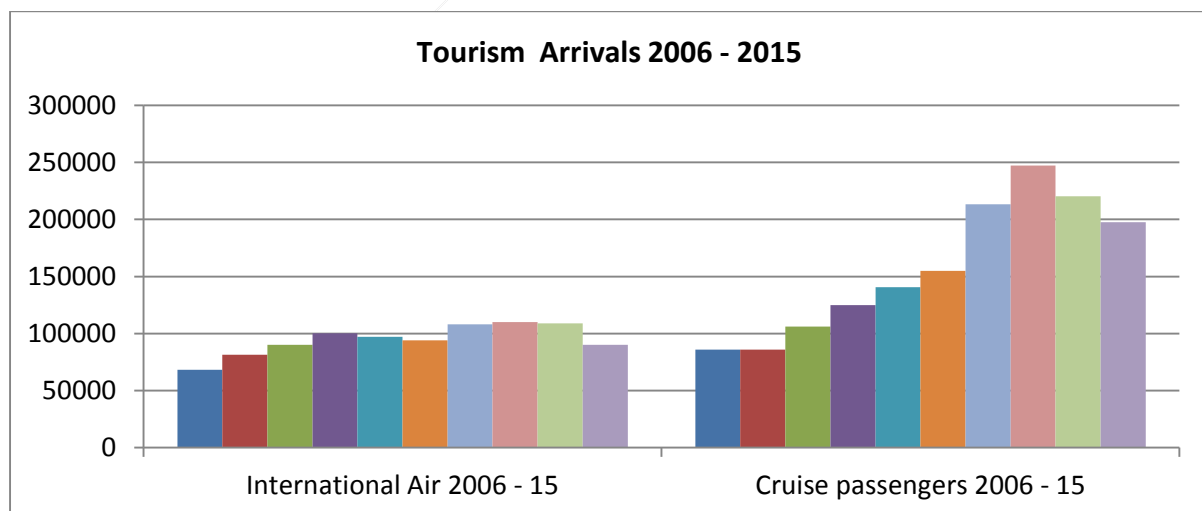
### Overview of the Tourism Sector

Tourism is a significant contributor to the country's GDP, with tourism related activity estimated to contribute 20 percent of GDP,<sup>15</sup> supporting 10,000 jobs.<sup>16</sup>

Both air and cruise ship passengers are important markets for Vanuatu. Visitor arrivals by air peaked at almost 109,000 in 2014 and the market grew by almost 60 percent between 2006 and 2014. However, arrivals have declined significantly since the peak. Just under 90,000 air arrivals were recorded in 2015, a decline of 17 percent. This decline was primarily due to the impacts of Cyclone Pam. Preliminary estimates indicate that the market has continued to decline in 2016 as a result of reduced air services from Australia and New Zealand. Early data indicates a further decline of approximately 20 percent for the year to date.

Cruise passenger numbers have increased substantially from around 86,000 in 2006 to a peak of 248,000 in 2013. Numbers have again declined since 2013 but there are signs of growth during 2016 from the level of 197,000 achieved in 2015. Figure 1 indicates the level of arrivals for air and cruise ship passengers from 2006 to 2015.

**Figure 1- Vanuatu Tourism Arrivals 2006 to 2015**



<sup>14</sup> Vanuatu Beef Value Chain Analysis, NZ MFAT - March 2014

<sup>15</sup> Vanuatu Sustainable Tourism Action Plan, 2014 – based on MCC Tourism Survey and Economic Impact Analysis

<sup>16</sup> Vanuatu National Statistical Office, Vanuatu Sustainable Tourism Action Plan, 2014; Vanuatu Tourism Sector Activity Design Document (MFAT), 2016

The tourism sector in Vanuatu is centred on Efate and specifically on Port Vila that contains the majority of accommodation. There are estimated to be over 2,500 rooms in Vanuatu with the majority in smaller owner/operated accommodation. No one hotel exceeds 200 rooms, but approximately 20 percent of supply is concentrated among the five largest hotels in Port Vila (Holiday Inn, Le Lagoon, Iririki, the Grand and the Melanesian). International investment predominates, particularly on the medium and larger sized properties. The target market for Vanuatu hotels is broadly the family and couples market, divers and niche culture/adventure segments. Port Vila also has a particularly strong appeal with Australian and New Zealand couples for extended weekend/week long holidays.

The majority of the remaining accommodation supply in Vanuatu is at 3.5 to 4 star standard and includes a mix of small and medium sized operations, mainly concentrated in and around Port Vila.

### **Restaurants**

Port Vila has a wide range of restaurants close to the major accommodation providers, compared to many other Pacific tourism destinations. Restaurants reflect both the Francophone background of Vanuatu as well as broader international cuisine styles. An IFC Study in 2015<sup>17</sup> identified 44 restaurants listed on tripadvisor.com in close proximity to Port Vila. This number of restaurants probably represents the majority that cater for tourists although there are many smaller establishments and food stalls catering for the local market.

### **Tourism and Agriculture Linkages**

The IFC's 2015 study into agritourism linkages<sup>18</sup> highlights that imported food items are a significant cost driver for the tourism sector. The study estimates that VUV1.5 billion (USD \$15.6 million) is spent annually by hotels and restaurants in Port Vila on fresh food items, including meat and dairy.

The study estimates that approximately 54 percent of all fresh produce used by hotels and restaurants in Vanuatu are imported. Import levels are significantly high for vegetables (50 percent), fruit (30 percent) and meat, seafood and dairy products (60 percent).

The level of imported supplies is increasing. With the growth in tourism and Vanuatu's increasing urbanization, Vanuatu's import bill rose 11 percent between 2011 and 2014. The food and live animal import bill alone was VUV5.9 billion in 2014, comprising 20 percent of the total import bill for the country. Meats including seafood and poultry and dairy account for 79 percent of the estimated import bill and total demand for vegetables was VUV190 million of which VUV108 million was on imports.

The hotels and restaurant sector attributes the demand for imports to a lack of reliable supply of high quality local produce. According to the IFC survey stakeholders attribute the unreliability and low quality of produce to a range of constraints, most notably:

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<sup>17</sup> *Vanuatu Agritourism Linkages - A Baseline Study of Agri Demand from Port Vila's Hospitality Sector - IFC*

<sup>18</sup> *ibid*

## Vanuatu Agritourism Plan of Action

- Lack of linkages between the buyers (hotels and restaurants) and the farmers via an aggregator or wholesaler, leading to a gap in information exchange and effective marketing of the produce
- A lack of modern infrastructure and farming tools and techniques including irrigation
- Inefficiencies of inter-island shipping with associated costs and post production food mishandling
- Competition from lower quality and lower priced imports, especially from south East Asian countries
- Inadequate access to high quality training and sources of affordable capital, limiting semi-subsistence farmers' ability to scale up, along with absence of mainstream farmers association leaving farmers with insufficient bargaining power.

The IFC study highlights the significant opportunities that exist for import replacement through the potential expansion of local agricultural production and improved agri-processing. In particular, the study indicates that Vanuatu imports significant volumes of staple vegetables and fruits including potato, onion, carrot, capsicum, cauliflowers, broccoli, cabbage, tomatoes, canteloupe and oranges, all of which can be grown in Vanuatu. Opportunities for increased local production (where current import values are greater than VUV400 million) include:

- Vegetables, in particular potatoes, onions, carrots and capsicums
- Fruits, in particular tomatoes, oranges and canteloupe
- Seafood items, in particular prawns and fish
- Meat, in particular pork, lamb, bacon, beef and chicken

### Agritourism Stakeholders

The agritourism sector involves a wide range of stakeholders including the public and private sectors, local and international NGOs and communities in Vanuatu. With so many players involved the institutional structure for support services to the sector is quite fragmented. Despite this, each organisation has an important role to play. Annex Two summarises the various stakeholder roles and agendas.

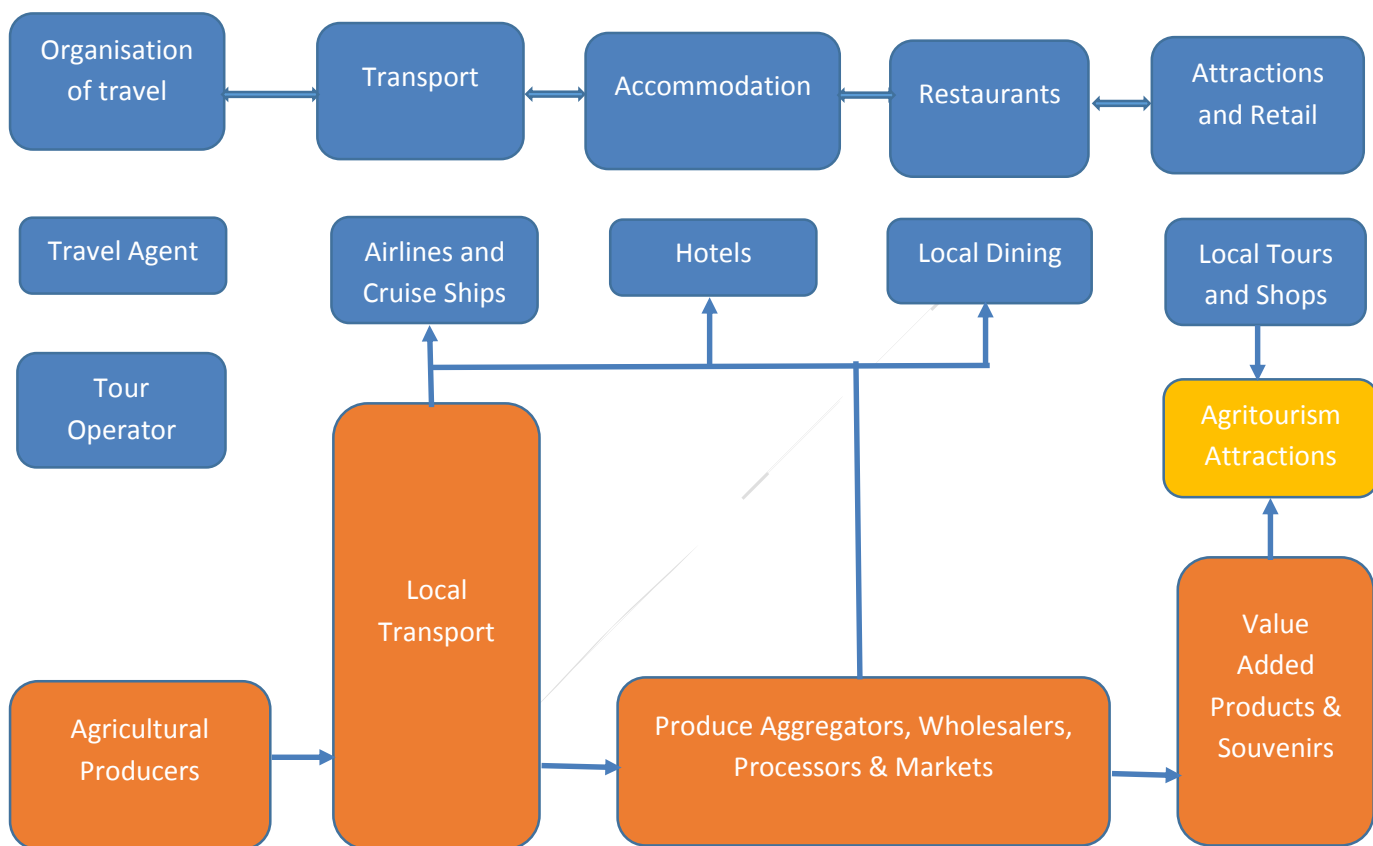


### 3. Vanuatu Agritourism - Development Constraints

#### Agritourism Supply Chain

Based on the broader definition of agritourism outlined in Section One, agriculture and tourism activities intersect and combine at several points along their respective supply chains (refer Figure 2 below).

**Figure 2- Vanuatu Agritourism Supply Chain**



Source: TRIP Consultants

#### Key Factors Influencing Agritourism Development

A number of factors influence the strength and type of linkage between tourism and agriculture in Vanuatu. Factors can be grouped around those that are demand related, supply related and those that relate to institutional and stakeholder relationships. A summary of these factors is provided below (Table 1).

**Table 1: Factors Influencing the strength and type of linkage between tourism and agriculture in Vanuatu**

Demand Related Factors	Supply Related Factors	Institutional/Organisational Factors
<ul style="list-style-type: none"> <li>• The kind of tourism development; type of visitor, accommodation with respect to ownership, size and class</li> <li>• Tourism industry maturity</li> <li>• The degree of promotion for local cuisine</li> <li>• The capacity to use local produce creatively in hospitality kitchens</li> </ul>	<ul style="list-style-type: none"> <li>• Natural resources base; physical limitations on production (crops, livestock and seafood)</li> <li>• Entrenched production patterns</li> <li>• The consistency, range, quantity and quality of local production</li> <li>• Price competitiveness of locally produced agricultural products</li> <li>• Technology and processing limitations</li> <li>• Health and safety standards in practice</li> <li>• Spatial and temporal patterns of supply (including seasonality in demand and supply)</li> <li>• Transport and infrastructure constraints</li> <li>• Land availability/security</li> <li>• Producer training and extension services</li> </ul>	<ul style="list-style-type: none"> <li>• Inter Government of Vanuatu and Public/Private sector coordination mechanisms</li> <li>• Policy frameworks</li> <li>• Industry organisational capacity and cohesion</li> <li>• Wholesaler/consolidator availability and capacity</li> <li>• Extension support services</li> </ul>

Source: Adapted by TRIP Consultants from Brief No 3 Business Implementation of Pro-poor Tourism Series – [www.propoortourism.org.uk](http://www.propoortourism.org.uk)

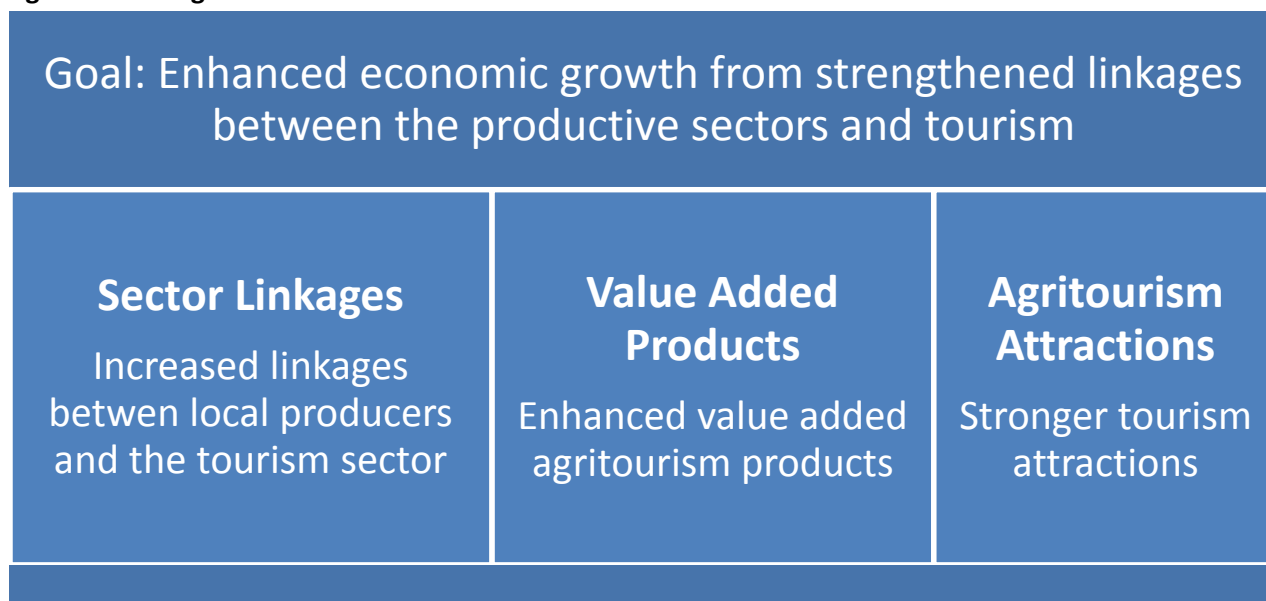
The key factors influencing the strength and type of linkage between tourism and agriculture highlighted in the table above have been analysed and a matrix developed to represent the current situation in Vanuatu. These factors and constraints, together with the identified strategic response are provided in Annex Three.

## 4. Agritourism Development Framework and Priority Actions

### Agritourism Development Framework

A Development Framework for Vanuatu Agritourism has been formulated through the participatory planning process undertaken for the VAPA. Figure 3 presents a high level goal for agritourism development which is linked to three strategic areas of focus. A guiding objective applies to each of the focal areas.

**Figure 3: Strategic Framework for the VAPA**



### Agritourism Action Plans

Action Plans for each of the three focal areas are outlined in the following section, together with the context, rationale and key constraints which have been identified. Further background analysis supporting each Action Plan is provided in Annex Four.

Each Action Plan identifies:

- The lead stakeholder responsible for implementation
- The level of resources required to implement
- The estimated level of impact
- The priority for implementation (Medium of High level)

The Action Plan identify a number of 'Early Wins' which could be undertaken to initiate the implementation of the VAPA. These 'Early Wins' are all rated as High Priority and are initiatives which can be mobilised in the short term and have a relatively high level of impact.



## ***Focal Area One – Productive Sector and Tourism Linkages***

### ***Objective: Increased Linkages between Local Producers and Tourism Operators***

#### **Context and rationale**

Linkages between the tourism sector and local primary producers are weak resulting in a high level of imports. IFC research (2015) indicates that 54 percent of all food products used by hotels are imported, equating to over US\$ 15 million a year. Substantial opportunities exist to substitute imported produce for locally grown fresh and processed products including selected vegetables and fruits, as well as fish, meat and poultry. IFC specifically identified the following opportunities for increased local production (where import values are greater than VUV 400 million):

- Vegetables, in particular potatoes, onions, carrots and capsicums
- Fruits, in particular tomatoes, oranges and cantaloupe
- Meat, in particular pork, lamb, bacon, beef and chicken
- Seafood items, in particular prawns and fish

Local hotels and restaurants identify a lack of consistent and reliable supply, poor quality of local fruit and vegetables, limited variety and high level of seasonality, as well as a lack of major producers and consolidators as being impediments to the greater use of local products. Other issues include limited information on crop production and supply availability, inflexible purchasing procedures by some of the larger hotels and limited use of available local produce in menu planning by some resorts.

Most commercial production of fruit and vegetables is aimed at domestic demand, although several commercial farmers are starting to produce for the hotels and restaurant markets. Producer data is poor and numbers have not yet been quantified.

Food processing facilities are limited and value adding is relatively small scale and niche based. Transport costs are high, particularly from the outer islands to the main market of Port Vila and cold storage facilities are limited. The application of modern farming practices is rare. Both technical and financial support for producers is limited and primarily provided by donor projects rather than core Government of Vanuatu support for the productive sectors.

#### **Key constraints**

The following key constraints for productive sector and tourism linkages have been identified:

#### ***1. Limited larger scale production and low consistency and quality of local primary production which meets the needs of hotels and restaurants***

Most agricultural production, livestock and fishing is undertaken by small holders, with few commercial producers of any scale. The IFC research (2015) indicates that consistency, quality, variety and scale of supply are all major factors which limit the use of local production by hotels and restaurants. A lack of scale inhibits supply, including volume, consistency, quality and range of local produce.

Most agricultural production is highly seasonal and the use of technology and even basic farming equipment is very limited. Pests and disease have a major impact on the production of many medium sized farmers, reducing returns and limiting new varieties, which have low rates of success compared with traditional crops. Producer organisations are few although some NGOs and lead commercial producers can play an important role in supporting smaller scale producers with extension advice, as well as acting as consolidators. Extension services are severely under resourced. Existing Government of Vanuatu Extension Officers generally have a low level of current training, inadequate skills and limited knowledge of modern farming and production techniques. With additional resourcing, some lead producers and aggregators could play an important role in providing extension services to smaller producers. Ways of improving farmer access to quality extension services should be explored to find ways of utilising existing and/or new approaches more effectively.

Limited downstream processing also inhibits value adding and any processing of seasonal crops. Scaling up requires the further development of food processing in parallel with increased production and local demand by the domestic market, as well as hotels and restaurants.

The use of modern techniques including hydroponics and even basic irrigation techniques and crop rotation is limited. Poor post handling and harvesting techniques, limited cold storage and inadequate freight services can lead to poor quality produce. The high cost of freight also limits opportunities for commercial returns on outer island production (including livestock, fisheries and agricultural crops).

Farmers and fishermen often have few bankable assets and limited agribusiness skills to be able to obtain finance for scaling up production or investment in modernising production. A high level of natural disasters and climate change impacts are increasing risk and lowering return on investment. Many producers have yet to recover from Cyclone Pam (and El Nino) and many require significant re-investment in equipment and their production.

Local producers also face substantial competition from imported products; imported products offer consistency and in some instances a price advantage. Many imported processed food and beverage products are less healthy than locally produced fruit and vegetables. The Government of Vanuatu should investigate strategies that will stimulate the production of local nutritious natural food products and discourage the consumption of food and beverage products which are of poor dietary value or high in sugar/fat/salt content. Such strategies need to be developed based on compliance with the WTO obligations of the country.

***2. Small scale production and a lack of primary produce consolidators, creates a barrier for hotels and restaurants to purchase locally***

Most hotels, resorts and restaurants purchase local produce from the local market and a range of retailers and small scale producers. Only a limited number of smaller producers deal directly with individual resorts and hotels, although direct supply is more common with restaurants.

Purchasing a wide range of supplies from many small producers, with varying quality, is time consuming and costly for many hotels and in some instances this can lead to a preference for a streamlined purchasing process using largely imported goods. Simplifying the purchasing process for local hotels through the role of a local consolidator or fresh produce wholesaler, would encourage greater use of local produce by the hotels and resorts. A consolidator or wholesaler could also oversee

fresh produce grading and provide delivery services of quality produce for hotels and resorts. Hotels also report a lack of formal receipts and from informal producers and market sellers inhibits purchasing from these sources.

A limited number of hotels are directly involved in the agricultural supply chain. This is particularly the case for several smaller boutique resorts who are unable to access consistent supply of fresh produce and have land available for small scale production. Such small-scale production creates local jobs and reduces imports (where other sources of supply are not available). Resort based production can also strengthen the tourism product by demonstrating local linkages and organics to visitors as well as strengthening links to local communities through employment. This model should also be encouraged for restaurants which cater for tourists to increase the use of local content, along with other activities such as the development of local Kai Kai recipe books and trainer for chefs. The TVET Programme is already engaged in facilitating this in rural areas.

### ***3. Limited knowledge and skills of local chefs in creatively using local produce and limited knowledge of local cuisine by tourists***

The IFC (2015) study confirms the high level of use of imported produce by hotels and restaurants in Port Vila. Whilst this is mainly a supply related issue, greater exposure to locally available products and better understanding of creative menu planning and food production utilising local produce will build demand and has the potential to support destination differentiation for Vanuatu. Better connecting suppliers with the end users (hotels and restaurants) and improved information exchange will enhance awareness of opportunities for both parties.

The level of demand for local produce could partially be increased by more targeted training aimed at those involved in formal culinary studies (such as at APTC), local chefs in restaurants and hotels, as well as contract based expatriate chefs who work at the larger hotels.

Best practice recognition in the use of local produce in menus, would encourage awareness and skills development to support increased demand for local produce from the hotels and restaurants. Creating greater exposure and awareness of local cuisine including the benefits of natural/organic production, will also enhance the value of local produce and create stronger demand from visitors.

## **Strategies and Actions**

The following strategies and actions have been identified to address the key constraints and to further strengthen the linkages between local producers and tourism operators.

### ***Strategy 1: Increase production and supply of primary produce inputs***

This strategy will increase the level of local supply of primary produce to meet the demand from hotels and restaurants, by identifying and working with lead commercial farmers and clusters of medium sized producers to improve production levels and the quality of supply for specific crops, as well as cattle and commercial fishing operations. It is aimed specifically at Key Constraint One.

Actions will involve the identification of commercial farmers and the formation of producer clusters which have capacity to upscale production and meet the needs of hotels and restaurants. Targeted support will be provided to the lead producers to improve production quantity, variety and quality

through agribusiness advisory assistance and a range of extension services. Assistance will target specific crops (such as potatoes, carrots, onions and cauliflower) as well as gaps in the supply chain including post production handling, transport and storage facilities as well as improved access to farm technology and equipment by producers.

An Agritourism Financing Scheme will be developed to support investments which improve supply to the hotels and restaurants. In tandem, financial incentives will be developed by Government of Vanuatu including duty exemptions on agricultural equipment and associated technology, such as hydroponic equipment. Financial assistance for small holders linked to viable grower organisations (such as the Sowers and Growers on Efate and Nasi Tuan on Tanna) as well as larger scale producers capable of meeting the quality requirements of the tourism sector, could be provided through a managed grant scheme to support investments in equipment, irrigation and other productive technology.

Scaling up production would be led by the private sector as well as NGOs, who are acting as lead producers. The Department of Agriculture and Livestock will target the facilitation of quality extension services to meet producers' needs and work with other Government of Vanuatu Departments to facilitate financial incentives and access to finance.

### ***Strategy 2: Strengthen and build the agritourism supply chain***

This strategy will target the supply chain to facilitate increased efficiency in the purchasing process for hotels and restaurants. Private sector investment in produce consolidation/wholesaling will be supported to create greater consistency in supply and efficiencies in hotel/restaurant purchasing.

Hotels and restaurants are already engaged in production to overcome supply shortages. Hotels have a vested interest in increasing local supply and (particularly in remote locations) hotels can facilitate production, replace imports and create employment. Useful models exist on Santo (Ratua and Oyster Island) where resorts coordinate with the Vanuatu Agricultural College and provide students with employment. These models could be replicated in other places in Vanuatu where supply of local produce is inadequate.

### ***Strategy 3: Increase the awareness of benefits and demand for local produce***

This strategy will target an increase in demand for local produce both from visitors and the existing hotels and restaurants. Increased demand for local content by hotels and resorts will be enhanced through training and awareness programmes for chefs as well as an increased publicity and awareness among consumers. Awareness and information exchange between producers and hotels and restaurants will also be encouraged and import substitution promoted.

The Government of Vanuatu should encourage the production of locally nutritious natural food products and discourage the consumption of food and beverage products which are of poor dietary value that have a major negative impact on health. These strategies would support increased local production and promote healthier lifestyle choices for the local population and visitors. Such strategies would also need to be fully consistent with Vanuatu's WTO commitments.

The value of local organic or sustainably produced fruit, vegetables, poultry and meat will also be enhanced through greater awareness of current voluntary certification schemes.

### Performance Measures and Targets

The following high level performance measures have been developed to assist with the evaluation of the impact of the priority actions for Focal Area Three.

Performance Indicator	Baseline	Targets	Measurement
Level of local supply of agricultural inputs to tourism operators	54 percent of all fresh produce imported by hotels and restaurants (2015)*	48 percent of all fresh produce imported by hotels and resorts by 2020	Survey of hotels and restaurants in Port Vila
Level of local supply of key vegetables inputs to tourism operators	100,000 kgs of potatoes and 10,000 kgs of cauliflower imported for hotels/restaurants (2015)*	50,000 kgs of potatoes produced locally and 5,000 kgs of cauliflower produced locally by 2020	Survey of hotels and restaurants in Port Vila
Specialist wholesalers/consolidators established to provide direct supply to hotels and resorts	No major consolidator/wholesaler supplying the hotels and restaurants in Vila	One fresh fruit and vegetable consolidator established and supplying hotels and restaurants in Vila by 2020	Survey of hotels and restaurants in Port Vila

\* Vanuatu Agritourism Linkages; A Baseline Study of Agri Demand from Port Vila’s Hospitality Sector. – IFC – 201



## Action Plan

FOCAL AREA ONE – Productive Sector and Tourism Linkages	Lead Responsibility	Resource Use L/M/H	Impact Level L/M/H	Priority Level L/M/H
<b>1. Increase production and supply of key primary produce inputs</b>				
<p><b>EARLY WIN PROJECT</b></p> <p><b>1. Provide targeted commercial scale farm support and extension services aimed at meeting tourism sector demand for fruit and vegetables</b></p> <p>1.1 Review existing research and survey gaps, identify and map lead commercial farmers on Efate, Santo and Tanna (initially)</p> <ul style="list-style-type: none"> <li>- Develop definition of lead farmers based on land under production, crops produced and supplied to the tourism sector</li> <li>- Design and implement a simple survey to identify producers and their crop production patterns</li> <li>- Develop and maintain database of information based on survey outcomes</li> </ul> <p>1.2 Develop and maintain database including commercial producer details, crop mapping and areas under production</p> <p>1.3 Initiate clustering using lead farmer model or grouping of commercial farmers and design and implement a managed small grants scheme to support investment in production (ie equipment, irrigation and technology)</p> <p>1.4 Undertake specific crop supply/demand analysis starting with the following:</p> <ul style="list-style-type: none"> <li>- Potatoes, onions, carrots, lettuces, capsicum, tomatoes, cauliflowers, zucchini and cantaloupe.</li> </ul> <p>1.5 Work with individual lead farmers and clusters to develop a Production Plan for each crop including integration of smallholder production into lead producer supply chains</p> <p>1.6 Explore more cost effective extension models to deliver targeted technical assistance/training to clusters/lead farmers to enhance production including:</p> <ul style="list-style-type: none"> <li>- Agribusiness management, financial planning and pricing</li> <li>- Seed and crop varieties</li> <li>- Organic farming</li> <li>- Pest control</li> <li>- Crop varieties and production techniques</li> <li>- Seasonality extension, yield enhancement and quality control</li> <li>- Production technology, equipment and production techniques</li> <li>- Post-harvest handling, storage and crop storage</li> </ul>	DoA/ Private Sector/ PIPSO	High	High	High

- Hotel and restaurant quality standards and purchasing procedures				
<b>2. Enhance commercial farmer competitiveness through access to finance, financial incentive, infrastructure and transport</b>  1.1 Develop and implement Agritourism Financing Scheme to support investment identified through the technical assistance inputs and identified commercial farmers and processors with co-funding for crop production equipment, hydroponics, technology investments, crop storage and water supply and cold storage 1.2 Increase financial incentives for agritourism producer investment by introducing duty exemptions on key inputs including equipment, seeds and feedstock, processing equipment, production related inputs such as hydroponics, plastics, irrigation and crop storage equipment. 1.3 Conduct feasibility studies to identify and Install storage and handling infrastructure at key production / transportation hubs/locations to support commercial farmer crop distribution 1.4 Conduct feasibility analysis of transport (air, sea, road) subsidies to support agritourism based primary production based on support for the lead producer model.	DARD/ MFEM/ MIPU	High	High	Medium
<b>1. Strengthen and build the agritourism supply chain</b>				
<b>EARLY WIN PROJECT</b>  <b>3.Facilitate the establishment of fruit and vegetable wholesalers/aggregators</b>  3.1 Call for EOI for private sector investment on commercial fruit and vegetable consolidator (PPP) 3.2 Support a feasibility study for establishment of wholesale commercial fruit and vegetable consolidator (Farmers Market for hotels and restaurants) in Port Vila (by private sector investor)	Private Sector	High	Low	High
<b>4. Support hotels and restaurants to directly engage in production and fill supply gaps</b>  4.1 Develop partnerships between hotels, resorts and restaurants with local communities and farmers to develop on/off site market gardens 4.1.2 Identify hotels/resorts interested in partnering with local farmers/communities 4.1.3 Provide technical assistance to encourage the establishment and maintenance of resort/hotel market gardens 4.1.4 Provide media coverage of success stories and best practice models	Private Sector	Low	Medium	Medium
<b>2. Increase awareness of benefits and demand for local produce</b>				

<p><b>5. Strengthening information exchange, understanding and relationships between buyers and sellers</b></p> <p>5.1 Develop Agritourism Week as a vehicle for B2B exchange as well as public awareness</p> <p>5.1.1 Establish working group with VHRA and VCCI to design and manage the B2B event as part of the Agritourism Week 2017.</p> <p>5.1.2 Develop budget and work programme for the meeting at least six months prior and approve funding by Government of Vanuatu.</p> <p>5.1.3 Provide follow up training to producers on buyers' feedback and demands as preparation for next annual event.</p> <p>5.2 Provide weekly information on market supply and availability to buyers (hotels and restaurants) through emailed newsletter</p>	DARD	Low	Medium	Medium
<p><b>6. Raise demand for local food content by hotels and restaurants</b></p> <p>6.1 Provide training for chefs through the Chefs Association to facilitate creative integration of local produce into menu planning.</p> <p>6.2 Review curriculum and enhance training on creative use of local produce into formal chefs training at APTC</p> <p>6.2 Facilitate special events to encourage creative use of local produce by resorts and hotels</p> <p>6.2.1 Progressive local dinner and competition as part of TOKTOK</p> <p>6.2.2 Chefs local kai kai competition as part of Agritourism Week</p> <p>6.2.3 Raise profile of creative local product use through VTO and operator marketing initiatives</p>	DOT/ Chefs Assoc/VTO	Low	Medium	Medium
<p><b>7. Create greater awareness and encourage organic certification</b></p> <p>7.1 Provide training for farmers and buyers to better understand PGS organic certification requirements</p> <p>7.2 Promote the benefits of Made in Vanuatu branding and organic produce within destination marketing</p> <p>7.3 Develop and support implementation of made in Vanuatu branding and labeling for consumer promotion purposes</p>	DARD/SPC/DOT	Low	Medium	Medium
<p><b>8. Encourage the consumption of locally nutritious natural food products</b></p> <p>8.1 Undertake educational campaigns and community awareness to encourage healthy eating habits</p> <p>8.2 Highlight the health benefits of eating nutritional local products to visitors and hotels/restaurants</p>	DoH/DOT	Medium	Medium	Medium



## *Focal Area Two – Value Added Agritourism Products*

### **Objective: Enhanced Value Added Agritourism Products**

#### **Context and Rationale**

In a similar way to agritourism attractions, value added agritourism products represent an important and growing component of Vanuatu exports and the agricultural and tourism sectors. A number of value added products such as coffee, sandalwood, kava, spices and coconut oils are also the basis of some agritourism attractions.

Value added agritourism products include coffee, kava, chocolate, coconut soaps, spices, oils and jams, Vanuatu-made handicrafts, cookies and chips made from cassava and banana, skin care and other health products made from or with plants such as sandalwood, tamanu and frangipani and other items such as soaps made with volcanic soils and minerals, that are purchased by visitors. It should be noted that many of these products are also exported direct to consumers or offshore wholesalers and retailers, especially coffee, sandalwood, cacao, kava, tamanu and coconut oils and soaps and other skin care lotions.

Value added agritourism products are important for the agricultural and tourism sectors because they: (i) contribute to Vanuatu exports (ii) raise and reinforce Vanuatu's strengths in agriculture and tourism (iii) link agricultural production with tourism and (iv) provide a sustainable source of income and employment for Vanuatu. Cyclone Pam caused a dramatic decline in production of most agricultural products especially coffee, cacao, coconuts, some root crops, banana and cassava; on Tanna it is estimated that over half of all coffee plants were destroyed. The impact of El Nino has also been significant on agricultural production in Vanuatu and has further damaged productive capacity.

Vanuatu is gaining a reputation internationally for some value-added products mainly coffee, kava, tamanu, sandalwood and coconut oils. Vanuatu is currently struggling to keep up with international and domestic demand for kava. Local chocolate made by ACTIV is emerging as a quality product made from local cacao. It is now available on cruise ships that call into Vanuatu, as is locally roasted coffee and Vanuatu water. Most value-added products position themselves based on their organic or natural ingredients, although few are formally certified.

For some added value businesses, the "suitcase trade" (purchases of value added products within Vanuatu by visitors) represents an important part of their turnover. For others, such as Volcanic Earth and The Summit Gardens it makes up only a small portion of total turnover. Feedback from the business owners less reliant on tourism suggests that they would prefer to maintain their "suitcase trade" even at relatively low levels of turnover in order to maintain profile for their brand and add to cash flow. Indirectly it also strengthens the profile of Vanuatu.

Total tourist spending on value added products is yet to be quantified accurately. Although the IVS (2015) results show low levels of spending on shopping / souvenirs / handicrafts by visitors (less than \$7 per person per day on average) there are no questions specifically on the wider range of value-added products. Spending on handicrafts is specifically reported as US\$3 per person per day in the IVS. The lack of reliable data is to be followed up with future IVS surveys. It has been estimated

however that the Vanuatu handicrafts industry is worth about VUV1.3 billion / US\$12 million (Ambassadors Programme, 2015).

### **Key Constraints**

The following key constraints were identified for value added agritourism products, based on industry consultation and an analysis of relevant reports and data:

#### **1. *Low profile of value added products in marketing channels to visitors***

Individual value added businesses in Vanuatu do promote their products locally and internationally via website and print media. There is little content on these products at a destination level, for instance on [www.vanuatu.travel](http://www.vanuatu.travel) or other popular online channels. There is also limited exposure for in-flight and lifestyle / leisure / food / healthcare magazines on the benefits of Vanuatu value added products.

#### **2. *Coordinated effort required to enhance competitiveness***

The potential to grow agritourism value added products and enhance competitiveness as a sub-sector is yet to be assessed. Individual business owners spoken to during preparation of this plan have visions and plans to expand, mainly for export. There is some interest in exploring how the “suitcase trade” can be leveraged further. A few businesses are looking specifically at the cruise ship market as an avenue for growth. Immediate concerns expressed by business owners wanting to sell more to visitors included pricing, packaging, presentation (product and shop-front) and marketing. Investment in new technology for product packaging was a common issue mainly for food producers. Results from the IVS (2015) tend to support these concerns. For instance, “price of goods and services” was ranked as the third least appealing aspect of visitors’ experience. Anecdotal feedback from visitors also suggests that value added items such as lotions, food and skin care products are generally seen as expensive. Product distribution and marketing is often poor for many value-added products. Consequently the average daily expenditure on “shopping / souvenirs / handicrafts” is low at less than 1,000 VUV per person. However, putting this in context, many visitors to Vanuatu are on air or cruise ship packages and tend to be very price sensitive. Overall, these issues suggest that a level of coordinated assistance would go some way in enhancing the competitiveness of Vanuatu value added products.

#### **3. *Limited capacity to scale up production and increase quality***

As with most agritourism attractions, there is limited capacity to scale up production of value added products at this point due in part to the impacts of Cyclone Pam and El Nino, but also the inherent constraints with small to medium-sized businesses operating in the Pacific. Inadequate local transport and the price of electricity and communications also hamper daily operations, driving up the costs of production. Investing in new technology, labour and marketing solely aimed at the visitor market is unlikely to be viable for many value-added businesses, especially those that are exporting. There is just not enough return on investment. Scaling up for both export and the visitor market makes more sense but this requires additional private equity and or other financing mechanisms. Once the main growth opportunities are understood, then assistance with investment and funding could leverage increased production and quality of value added products being supplied to visitors.

#### **4. *The handicrafts sector needs a major boost***

Despite recent assistance from the Tourism Ambassadors Programme, the DFAT-funded PHAMA export project and a new Vanuatu Handicraft Market venue, the handicraft sector has not moved ahead as was hoped for. An estimated 70 percent to 80 percent of handicrafts sold in Vanuatu are imported (Gavotto, 2016). Reportedly many Ni Vanuatu sellers of handicrafts are in debt to other local importers of Chinese / Indonesian souvenirs and handicrafts. This tends to block any chance of selling higher-priced, locally produced items. It is estimated that a 20 percent reduction in imported handicrafts could generate VUV100 to VUV200 million in retained earnings if more handicrafts were locally produced (Ambassadors Programme, 2016). Not surprisingly visitor expenditure on handicrafts and artwork remains low. The sector is still in need of rejuvenation. Estimated to be worth approximately VUV1.3 billion or US\$12 million, the handicrafts sector plays an important part in the rural and urban economies of Vanuatu. Additional assistance is being provided for handicrafts development through the New Zealand Government of Vanuatu funded VSTAP.

#### **5. *Lack of reliable data on economic impact of value added agritourism products***

Little is known about the export value or value of agritourism products sold to visitors. There is also a lack of reliable data on the economic impact of agritourism attractions. Recent studies by IFC have provided valuable data on the economic value of the cruise ship industry, also shedding light on the potential value of the handicrafts industry. The current IVS does not have enough specific categories to detect spending on value added agritourism products, nor agritourism attractions. By adjusting the IVS questions, useful data could be gathered and used for sector growth initiatives.

### **Strategies and Actions**

The following strategy and supporting actions will address the key constraints and enable further growth in value added products.

#### ***Strategy 1: Increase expenditure on value added agritourism products by visitors***

This strategy includes five associated actions aimed specifically at increasing visitor expenditure on value added products. The actions address key constraints one to five.

The first action involves raising consumer and trade awareness of the range of value-added products on offer and their benefits. New content would be prepared for online and print marketing activities coordinated by the VTO. An existing or new annual event would also be used to showcase skin care, health, food, drink and other natural products made in Vanuatu.

The second action entails working closely with value added businesses to explore ways to scale-up production to meet demand, invest in new technology or processes and marketing, bring expert advice to hand (as has recently been done with a local food processor), access finance and undertake targeted market research into specific product lines in order to assess future growth potential. An immediate need is to improve the quality of packaging and use more competitive pricing strategies. These activities would be led by the private sector, although there is scope for Government of Vanuatu (VIPA and the Department of Industry and Commerce) and donors (IFC, MFAT, DFAT) to provide technical and or funding assistance based on sound business plans. Under this action there will also be a focus

on leveraging new investment in existing or new products. This would facilitate partnerships between producers and processors, relevant NGOs, cooperatives or other businesses.

The third action centres on strengthening the handicraft industry. A handicraft industry coordinator will be appointed shortly under VSTAP to help drive a programme of work guided by a Handicraft Industry Working Group. Activities include development of more contemporary product designs, improved marketing and presentation for sale in markets and retail outlets, promotion of a “Made in Vanuatu” brand and establishing more effective wholesale / distribution / quality control mechanisms.

The fourth action involves minor adjustment to the IVS in order to obtain more useful data on visitor expenditure on value added products. Surveys of value added businesses would also be carried out over time to better understand the value of exports compared with the value associated with the tourism industry.

The fifth action will be to introduce a ‘Made in Vanuatu’ brand and labelling which will build on work undertaken through the Tourism Ambassadors Programme and create greater awareness of local products amongst tourists and locals.

## Performance Measures and Targets

The following high level performance measures have been developed to assist with the evaluation of the impact of the priority actions for Focal Area Two.

Performance Indicator	Baseline	Targets	Measurement
Visitor expenditure on agritourism value added products	No data other than spending on handicrafts / souvenirs at US\$3 per person per day or US\$21 - \$24 per trip. Air passengers spend similar amounts to cruise ship passengers (Gavotto, 2016)	US\$15 / VUV1,600 per person per day or US\$105 / VUV11,200 per trip**	Annual IVS and cruise ship passenger surveys (requires adjustment to IVS questions to track spending on value added products)
% of business turnover for existing and new agritourism value added products attributed to visitor spending	No data	5 percent to 7 percent increase per annum	New survey of value added businesses to distinguish between export and tourist – related turnover
‘Made in Vanuatu’ brand introduced	Only limited labelling under Vanuatu name including some value-added products	Brand developed and 75 percent of value-added products labelled	Inspection of value-added products in retail outlets

\* Results from the IVS (2015) cannot be used as a baseline as there is no specific category for agritourism value added products

\*\* It is assumed as value added products continue to improve, that spending per person per pay could be as much if not more than spending on agritourism attractions or activities.

<b>FOCAL AREA TWO – Value Added Agritourism Products</b>	<b>Lead Responsibility</b>	<b>Resource Use</b> L/M/H	<b>Impact Level</b> L/M/H	<b>Priority Level</b> L/M/H
<b>3. Increase expenditure on value-added agritourism products by visitors</b>				
<b>1. Promote value added products within Vanuatu destination marketing activities</b> 1.1 Prepare online and print-ready content for the VTO to use in campaigns and other marketing activities 1.2 Generate editorial content for consumers on Vanuatu chocolate, coffee, oils, lotions, coconut, handicrafts and other products (in-flight, cuisine, cruise and travel magazines, social media and websites) 1.3 Deliver promotional events that showcase natural products made in Vanuatu, for instance, a Vanuatu Sustainable Food and Lifestyle Festival or local Food Week in Hotels/Restaurants	VTO/DOI/DOT/VIPA	Low	High	High
<b>EARLY WIN PROJECT</b> <b>2. Strengthen competitiveness and quality of value added products (oils, lotions, soaps, handicrafts, food, drinks and so on)</b> 2.1 Provide expert business or technical advice and access to finance for existing and new businesses, or clusters of businesses, involved with value added products 2.2 Offer immediate assistance to improve pricing and packaging of value added products 2.3 Undertake a market-led assessment of the demand for added value products and provide incentives to assist existing or new operators to meet gaps in supply 2.4 Assess options for joint venture investments with local investors (hotels or other businesses) or overseas investors to scale-up production of value added products 2.5 Develop and implement 'Made in Vanuatu' Programme including value added products	DoI/VCCI	Low	Medium	High
<b>3. Increase sales of Vanuatu handicrafts to the tourism sector</b> 3.1 Establish a Handicraft Industry Working Group and Sector Coordinator 3.2 Create new product designs that match market preferences using local and other expert handicraft specialists 3.3 Revitalise handicraft outlets in Port Vila, Santo and other cruise ship calls with higher quality products	DoI	Medium	Medium	High

<p><b>4. Assess the economic value of agritourism products to Vanuatu</b></p> <p>4.1 Incorporate questions into the Vanuatu International Visitor Survey to provide baseline expenditure on agritourism added value products</p> <p>4.2 Measure the economic impact of agritourism attractions and value added products (handicrafts, skin care products, food and drink) that are sold to visitors. Note, the economic value of local fruit and vegetables supplied to the tourism industry was assessed in 2015 by IFC</p>	VTO/DOT/VNS O	Low	Low	Medium
<p>5. Develop a 'Made in Vanuatu' brand for value added products and promote to visitors and local buyers.</p>	DoI	Low	Medium	Medium

## *Focal Area Three - Agritourism Attractions and Tours*

### **Objective: Stronger Tourism Attractions**

#### **Context and Rationale**

Agritourism attractions make up a relatively small but increasingly important component of the agriculture and tourism sectors. These attractions play a valuable role because they (i) provide local business and employment opportunities (ii) generate additional income for small-to-medium scale agricultural operations (iii) enable sustainable use of natural resources and (iv) raise the profile of leading Vanuatu produce such as coffee, cacao, kava, vanilla, coconut, sandalwood and beef.

Agritourism attractions range from those that are primarily a visitor attraction with an agricultural component through to agricultural operations offering visitors a chance to experience processing, harvest and final or value-added products. The proportion of total business turnover that relies on agricultural inputs can vary from over 90 percent to as little as 10 percent.

Less than 10 percent (roughly 10 to 12 operators) of all attractions and tours on Efate, Santo and Tanna would have agriculture as a core or substantive component of the visitor experience.<sup>19</sup> Many other tourism businesses are linked indirectly to agriculture but are not managed or marketed as agritourism experiences. Examples include hotels, resorts, restaurants/cafes, tours and transport operations that provide local fruit, vegetables, meat and locally processed foods (honey, jam, juice) to visitors as part of their service. Nonetheless, these operations play an important part in linking tourism with agriculture.

Examples illustrating the diversity of agritourism experiences include (i) The Summit Gardens – primarily a sandalwood export operation, The Summit also incorporates a native garden, restaurant and retail sales of sandalwood and related health products (ii) Tanna Coffee – a coffee export and domestic supply operation with a roaster, retail and café operation near Port Vila catering to locals and visitors (iii) Eden on the River – an adventure farm park and gardens incorporating local meat, fruit and vegetables with its tours and café operation (iv) ACTIV – an NGO producing quality chocolate from local cacao and virgin coconut oils, both for local supply and export as well the sale of handicrafts and coconut oil and operating as a visitor attraction (v) Round Island Tours – multiple operators that link established agritourism attractions and villages supplying food and coconut drinks (vi) Port Vila Mamas Market – the largest agritourism operation in Vanuatu (in terms of visitor numbers) selling local fruit and vegetables primarily to local residents and businesses but also to visitors (vii) Vanuatu Handicraft Market, Wharf Road Port Vila – a dedicated outlet for locally produced handicrafts and value added products (viii) Ekasup Village Tour – an established village tour showcasing food gathering, storage, cooking and other cultural traditions (ix) Vanuatu Secret Garden and Outdoor Cultural Centre – an existing visitor attraction and soon-to-open resort and restaurant based on historical / cultural heritage presentations, folklore and dance, handicraft production, local foods, garden and kava ceremony.

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<sup>19</sup> It is estimated that about 10 to 12 attractions and tours out of 159 listed on the DOT tourism database for Efate, Tanna and Santo would have agricultural products as a core offering. A further 8 to 10 attractions and activities appear to have agricultural products as a side-component of the visitor experience.

## **Key constraints**

The following key constraints for agritourism attractions have been identified based on industry consultation and an analysis of relevant reports and data:

### ***1. Low profile in the market place***

There is very little content in the main marketing channels (online and print, both consumer direct and for trade) on opportunities to experience local produce such as coffee, cacao, sandalwood, coconut, beef and seafood. It is likely that many visitors will not be aware of what products are available. This assumption is supported to some extent by results from the International Visitor Survey (IVS, 2015) that show US\$7 average daily per person expenditure on local tours (including agri-tourism), US\$3 daily expenditure on handicrafts/artwork and US\$1 per day on food from local markets. By contrast, visitors spend on average US\$23 per person per day on restaurants/cafes.

### ***2. Limited capacity to scale up***

Most agritourism attractions are small to medium-sized businesses. They are typically constrained in terms of access to finance, skill development, investment in new technology and marketing. Donors and the Vanuatu Government of Vanuatu have and continue to assist in building tourism business capability. Examples include agritourism and pure agriculture sector studies funded by IFC, EC and MFAT (between 2010 and 2016), Vanuatu Strategic Tourism Action Plan / Vanuatu Tourism Programme (2014 – 2020) funded by MFAT and the Skills Development for Economic Growth Programme (including TVET Centres and APTC) funded by DFAT. The Tourism Ambassadors Programme, Discovery Trails and other activities under the MFAT-funded Vanuatu Tourism Programme are aimed at building business capability and developing new visitor experiences, although at this stage, not directly for agritourism operators. There is currently no SME matching grant scheme for the tourism sector. Banks and private investors are the main source of finance. Coupled with the lingering effects of Cyclone Pam as well as the impact of El Nino, it means that most agritourism businesses are finding it very hard to innovate and grow.

### ***3. Lack of opportunities for visitors to spend more at the Port Vila Mamas Market***

The biggest agritourism attraction in Vanuatu is missing its potential to engage with visitors in a more meaningful way. Many visitors walk through the market and some buy small amounts of local fruit and vegetables. The IVS (2015) results show that visitors spend US\$1 on average per day on food from local markets. The Port Vila Mamas Market would be included in this result. Approximately 28 food vendors at the rear of the market serve meals almost exclusively to Ni Vanuatu and a small number of visitors. There is an opportunity to increase sales to visitors and broaden the Mamas Market experience and therefore increasing the economic impact. In a similar way but on a smaller scale the Santo Market experience could be enhanced by improving food quality, hygiene and awareness among visitors.

### ***4. Lack of critical mass***

Agritourism is gradually taking hold in Vanuatu. At this stage the sector is made up of less than 10 businesses that operate independently. The Port Vila Mamas Market and to a lesser extent the Santo Market are the only locations where agricultural produce is brought together in one place that visitors can also access. Only one retailer in Port Vila specialises in agritourism value added products such as coffee, cookies, oils and lotions, soaps and other skin care. Although this is a well-managed and presented outlet, it is not yet a visitor attraction per se. In time, clustering of agritourism products may be required to capture a greater share of visitor markets. This could include



an agritourism centre to showcase production processes and end products under one roof and tours that link together multiple agritourism attractions.

#### **5. *More recognition required to support good practice***

Good practice is recognised via tourism industry and other business awards. None of these specifically showcase products or innovation in the use of local food or natural products for handicrafts.

## **Strategies and Actions**

The following strategies and actions have been identified to address the key constraints and enable further growth in agritourism attractions.

### ***Strategy 1: Integrate agritourism strengths and benefits into Vanuatu destination marketing***

This strategy will raise consumer and travel trade awareness of what is on offer and how to experience it, to increase demand for existing agritourism attractions. It is aimed specifically at key constraint one. Actions will involve the preparation of increased media coverage and new content (for example on [www.vanuatu.travel.com](http://www.vanuatu.travel.com)) on locally made handicrafts, coffee and other local produce, Vanuatu cuisine, agritourism attractions and special events; inclusion of agritourism within regular trade familiarisations and specific campaign activities. These actions would be led by the Vanuatu Tourism Office which in-turn will work closely with agritourism businesses to raise profile and awareness.

### ***Strategy 2: Strengthen agritourism attractions and the product base***

This strategy will target agritourism businesses or operations with the willingness and capacity to improve and or scale-up their products and services. It is aimed at constraints two to five. Actions include (i) business support, skill development and access to finance (ii) skill development, financial assistance and facility upgrades for the Mamas Market food vendors (iii) feasibility study and other technical assistance to enable clustering of products, possibly into an agritourism centre(s) that would also serve as a leading visitor attraction and (iv) changes to the Vanuatu Tourism Awards Scheme to incorporate and recognise agritourism good practice. These actions will require collaboration between Departments of Tourism, Industry and Commerce, Vanuatu Tourism Office and existing donor programmes including VSTAP, the Skill for Economic Growth Programme (TVET) and the Tourism Ambassadors Programme.

## Performance Measures and Targets

The following high level performance measures can be used to monitor and report on the performance in implementing Focal Area One.

Performance Indicator	Baseline	Targets	Measurement
Visitor expenditure on agritourism attractions or activities	Average of US\$7* per person per day or close to US\$50 per visit on tours (agritourism tours would be included within this but not specified as such)	US\$10 or VUV1,100 per person per day or US\$70 / VUV7,500 per trip to Vanuatu on agritourism attractions	Annual IVS and cruise ship passenger surveys (requires adjustment to IVS questions to track spending on agritourism tours/attractions)
% of business turnover for existing and new agricultural based attractions/activities attributed to visitor spending	No data	5 percent to 7 percent increase per annum	New survey of agritourism businesses**

\* The IVS data is for air arrivals only. Using an average length of stay of 7 days, this suggests a total spend in the order of US\$50 per person per trip to Vanuatu.

**\*\* Many agritourism attractions also sell value added products such as coffee, chocolate and health / skin care products. Only one survey is required to monitor visitor expenditure on both agritourism attractions and value added products**

Action Plan

FOCAL AREA THREE - Agritourism Attractions and Tours	Lead Responsibility	Resource Use	Impact Level	Priority Level
		L/M/H	L/M/H	L/M/H
<b>4. Further highlight agritourism strengths and product benefits into Vanuatu's destination marketing</b>				
<p><b>EARLY WIN PROJECT</b>  <i>1.1 Develop and implement supporting agritourism based marketing content and destination promotion activities</i>            1.1.1 Provide new content for social media, <a href="http://www.vanuatu.travel.com">www.vanuatu.travel.com</a> and VTO marketing literature            1.1.2 Facilitate media coverage of products through VJPs and trade familiarisations            1.1.3 Highlight operator best practice use of local food content through VTO marketing activities            1.1.4 Develop database of agritourism products</p>	VTO	Low	High	High
<b>5. Strengthen and expand the agritourism attractions and tours product base</b>				
<p><b>EARLY WIN PROJECT</b>  <i>2.1 Provide business/marketing support, mentoring and skill development of individual operators and clusters (including Discovery Trails products)</i>            2.1.1 Provide skill development on bookkeeping, pricing, commissions, quality control and managing visitors to agritourism attractions            2.1.2 Link with the TVET RTCs and VCCI for business coaching and mentoring services            2.1.3 Provide access to business development grant funding or micro-finance            2.1.4 Incorporate agritourism into Discovery Trail on Santo and Efate (including value added foods and local fruits component)</p>	TVET/VCCI	Medium	High	High
<p><b>EARLY WIN PROJECT</b>  <i>2.2 Enhance the local Mamas Markets agritourism visitor experience</i>            2.2.1 Provide training to Port Vila Mamas (initial pilot followed by Santo) food vendors on food hygiene, cooking for tourists and presentation            2.2.2 Support the upgrading of Port Vila (initial pilot followed by Santo) market food vendor facilities to enhance security and hygiene            2.2.3 Support promotion of Port Vila Market vendors (followed by Santo) through specific signage and VTO information and promotional activities</p>	TVET/VCCI	Low	Medium	High

2.2.4 Support development of new or improved agritourism markets in other locations in Vanuatu where there is a strong link between tourism and local produce				
<p>2.3 <i>Enable product clustering to add critical mass to agritourism in Vanuatu and to showcase local, small-scale organic products</i></p> <p>2.3.1 Conduct a feasibility study into the concept of a commercial Agritourism Centre / Visitor Attraction that showcases many of the smaller, organic agritourism producers (chocolate, coffee, vanilla, sandalwood, local handicrafts, coconut and other oils, soaps, biscuits and so on)</p> <p>2.3.2 Based on a robust feasibility study / business plan, facilitate access to finance for an Agritourism Centre – Visitor Attraction</p>	DoT/Private Sector/ACTIV	Low	Medium	Medium
<p>2.4 <i>Highlight agritourism best practice in Vanuatu</i></p> <p>2.4.1 Liaise with the Department of Tourism and Tourism Awards Scheme to develop criteria that would recognise / highlight local food, agritourism attractions and value added products</p> <p>2.4.2 Integrate agritourism attractions and products into the Tourism Awards Scheme including Best Agritourism Operator, Most Innovative Use of Local Kai Kai, Tastiest Local Dish, Best Local Chef, Most Innovative New Handicrafts.</p>	VTO/DOT/Tourism Awards Committee	Low	Medium	High

## 5. Governance Arrangements

The Governance Arrangements and the implementation and monitoring requirements for VAPA are outlined in this Section. The implementation of the VAPA will require considerable coordination across the public and private sectors due to the wide range of stakeholders involved. Funding and manpower commitments will be required to both facilitate coordination and support the implementation of the specific priority actions which are outlined in Section Four. In addition, the VAPA will need to be a dynamic document which responds changing circumstances and emerging new priorities. The monitoring and evaluation of activities undertaken will therefore be key in determining the outcomes from the identified priorities, as well as shaping future activities.

### **Agritourism Steering Committee (ATSC)**

The Agritourism Steering Committee will be responsible for the coordination of the implementation of the VAPA.

The ASC will be responsible for:

- Oversight of the implementation and coordination of priority actions within the ASC
- Individual ASC members will be tasked with project management of the implementation of specific Actions
- Reporting back on implementation to the ASC at the six-monthly meetings
- ASC members will be responsible for allocating funding from available sources for ASC actions, including their own agency recurrent budget
- The Chairman will be responsible for liaison with donors for development funding for unfunded actions.

The composition of the ATSC will be broadened to include additional private sector representation including representatives from the Vanuatu Hotels and Resorts Association, the Vanuatu Chefs Association and the tourism and agriculture Board members of the VCCI (or their nominees). Key donor partners and programmes (such as TVET and VSTAP) will also be invited to attend ASC meetings.

### **VAPA Secretariat**

The Department of Tourism has budgeted for an Agritourism Officer in the 2017 budget. The DoT will provide Secretariat Services to the ASC and coordinate reporting and monitoring of the implementation. The Agritourism Officer (or in their absence another Senior Tourism Officer) will provide the administrative function required to support the implementation of the VAPA (under the supervision of the VAPA Chairman), including recording and circulation of the minutes, preparation of six monthly progress reports and follow up with individual members to assist with implementation.

The Secretariat also plans with the Committee to develop an annual work program covering the key activities identified in the Plan for implementation as part of the VAPA Implementation Plan. This annual work program is a detailed summary of the annual activities each agency of the Committee will implement on a yearly basis.

## **VAPA Implementation Plan**

The ASC will review the Action Plans in this document and develop a sequenced implementation programme for the next three years. The sequenced VAPA Implementation Programme should consider the 'early wins' identified in the Action Plans, as well as the high and medium term priorities.

The VAPA Implementation Programme will set out the resources required for implementation, based on the sequencing and priorities identified. A Medium-Term Expenditure Framework will be developed to indicate the financial commitments to implementation made by the various stakeholders including Government of Vanuatu agencies, the private sector, NGOs and donors. As part of the Implementation Programme supporting strategies will need to be developed to address communications and risk management to enhance management of the Plan implementation.

## **Monitoring and Reporting**

A Six-Monthly VAPA Progress Report will be prepared by the Secretariat and provided to the ASC for review and endorsement. Following endorsement, the Six-Monthly Report will be provided to both the Minister for Agriculture Livestock Fisheries Forestry and Biosecurity and the Minister for Trade Tourism Commerce and Industry who will jointly table the Progress Report to the Council for Ministers. The Progress Report will report on the specific performance measures and targets that have been established for each of the Focal Areas as well as the level of implementation for each of the Actions. Key constraints, and recommendations should also be included in the Six-Monthly Report.

The Focal Area Performance Indicators and Targets (summarised on Pages 11, 17 and 23), provide the basis for the monitoring of the implementation of the Plan. In some instances, additional data collection will be required to support the monitoring process either through new surveys (ie a Survey of Agritourism Businesses – attractions and value added and a Survey of Hotels/Restaurants), as well as the expansion of existing surveys (ie the IVS and Cruise Passenger Surveys).

## **Annexes**

**Annex One – Vanuatu Agritourism Steering Committee – Structure and Role**

**Annex Two – Stakeholder Roles and Agendas**

**Annex Three – Key Factors, Current Situation and Strategic Implications**

**Annex Four – List of Documents Reviewed**

**Annex Five – List of Individuals Consulted**

## Annex One

### Vanuatu Agritourism Steering Committee (ATSC)

In December 2015 the Government of Vanuatu established the Vanuatu Agritourism Steering Committee (VATSC) as a joint initiative between the Ministry of Agriculture, Livestock, Forestry, Fisheries and Biosecurity (MALFFB) and the MTTICNVB to provide oversight and support the development of the Agritourism sector. The specific objectives of the VATSC are to:

- Strengthen cooperation and linkages between the two Ministries in implementing plans and policies to grow the productive sector
- One hundred percent use of vegetables, fish, pork, chicken, root crops and beef consumed in hotels and restaurants in Vanuatu from local producers
- Locally made value added products are abundantly available to the tourism industry all the time (ie handicrafts, coconut oil based products)
- HTLTC culinary program is based on local aelan kakae
- Tourism product base diversified to include marine tourism, agritourism and ecotourism
- Increased domestic access to quality locally produced and processed products
- Increased access to finance to farmers to facilitate increased supply of produce
- Enhanced investment environment for primary producers
- Enhanced techniques developed to ensure sustainable supply of quality locally made and value added products
- Increased number of agriculture, livestock, fishermen and forestry and value addition producers transferred from informal to formal sector

A number of short term outputs are identified within the VATSC Terms of Reference (TOR) which include creating greater cooperation and awareness between the two Ministries to facilitate agritourism development and joint programming, as well as survey and research to better identify demand for local content, create an inventory of all producers who can supply the tourism sector as well as an inventory of all ni-Vanuatu value added producers and the implementation of training for all producers who supply the tourism sector in key areas such as product quality, pricing, business management, post-harvest handling and packaging and marketing.

Longer term outputs are also outlined in the TOR which include increased domestic production and export of agricultural products, improved product quality and increased registration of productive sector businesses.

The VATSC is Chaired by the Director of Tourism acting as Deputy Chair, with a further 10 members drawn from agencies from the two Ministries and one private sector representative through the VCCI. The TOR indicates Technical Working Groups (TWGs) will be formed to support specific project and these will facilitate broader representation. Budgetary support will be provided through the relevant agencies recurrent budget with additional donor and private sector funding sought for specific programmes.



## Annex Two - Stakeholder Roles and Agendas



Stakeholders	Role/Comments
<b>Government of Vanuatu</b>	
Ministry of Agriculture Livestock Forestry Fisheries and Biosecurity (MALFFB)	<p>MALFFB takes the lead role in agricultural sector policy and supporting agricultural production and productivity through extension services and training. MALFF focuses on enhancing production <i>'as far as the farm gate'</i>.</p> <p>MALFFB has broad responsibility including policy development, maintaining relevant industry legal and regulatory frameworks, quarantine border controls, facilitating market information, and promoting food security through appropriate research, development and technology transfer. Most initiatives target producer/farmer groups and communities that is challenging given geographic and rural transport constraints. MALFFB has an active 2014-2018 Corporate Plan.</p> <p>Biosecurity Vanuatu takes the lead role in maintaining sanitary and phytosanitary standards to ensure continued protection of plant and animal health status and to facilitate exports</p> <p>The Director of Agriculture is also chair of the newly formed VATSC (see Annex One for outline of the VATSC structure and functions).</p>
The Ministry of Trade Tourism Commerce and Industry (MTTCI)	<p>The MTTCI has the lead role in setting trade policy and policy for the tourism sector. The Department of Tourism has the lead role in supporting licensing and industry standards, product development including cruise shipping and coordinating tourism industry training.</p> <p>The Vanuatu Tourism Office has responsibility for tourism marketing and is a statutory authority.</p> <p>The Department of Industry and the Department of Cooperatives and Ni-Vanuatu Business have a lead role in supporting access to markets, business up skilling and supporting on shore processing and value adding. The Department of Industry is also responsible for inspection and licensing of food vendors and restaurants. The Food Technology Development Centre also falls within the Ministry portfolio.</p>
The Department of Strategic Policy, Planning and Aid Coordination	DSPPAC within the PMO is the lead agency for policy development, sector coordination and monitoring.

Vanuatu Agricultural Research and Technical Centre	<p>The Vanuatu Agricultural Research &amp; Technical Centre is located on the island of Espiritu Santo. VARTC is mandated by Vanuatu Government of Vanuatu to conduct R&amp;D activities in the field of agriculture, livestock and forestry.</p> <p>It is the national research centre for coconut, coffee, cocoa and livestock in Vanuatu. More recently root/tuber crops, nuts and breadfruit have been added to the research programme. VARTC contributes to the economic development of Vanuatu by selling improved plant materials and cattle, providing training in agriculture and breeding, and providing scientific and technical information.</p>
Vanuatu Agriculture College	<p>The purpose of the Vanuatu Agriculture College is to be the Centre for the training of farmers and acquisition of farming technologies and skills for enhancing agriculture production and in so doing contributing to the economic and social development of Vanuatu.</p> <p>VAC provides a centre for teaching to upskill farmers in agricultural production and provides courses in livestock, agribusiness, forestry, aquaculture, communications and IT.</p>
Other Government of Vanuatu Ministries and Agencies	<p>A large number of other Government of Vanuatu agencies are indirectly involved in agritourism through supporting policies and programmes. Examples include The Ministry of Infrastructure and Public Utilities through the provision and maintenance of supporting infrastructure and the Ministry of Finance and Economic Management through the provision of fiscal incentives for the private sector and import levies and duties.</p>
<b>Private Sector</b>	
Vanuatu Chamber of Commerce and Industry	<p>The VCCI is the peak private sector body whose role is to represent the private sector in policy dialogue and to support businesses on key issues. The VCCI also provides limited small business training services. VCCI has both designated agricultural and tourism representatives at a board level.</p>
Tourism Industry Associations	<p>The Vanuatu Hotel and Resorts Association is the largest tourism industry organization and represents the majority of larger and medium sized accommodation operators. VHRA collects a visitor levy that supports destination marketing. The Vanuatu Tour Operators Association is the peak body for tour operators and attractions. Several Provincial industry associations also exist with the most active being the Espiritu Santo Tourism Association.</p>
Individual Tourism Businesses	<p>There are over 200 accommodation providers in Vanuatu and over 50 restaurants catering for tourists on Efate alone who represent a substantial existing and potential market for locally produced agricultural products.</p>
Cruise Ship Operators	<p>A number of cruise ship operators visit Vanuatu on a regular basis. Carnival Cruises is the largest in terms of number of calls and passenger numbers. Cruise companies act as an on-board wholesaler for tour companies, sell limited Vanuatu agritourism products to customers</p>

	(eg Tanna Coffee) and have some potential to purchase fresh food supplies from Vanuatu, although this is restricted by supply quality and consistency, as well as cruise company bulk purchase procedures and quality control systems.
Individual Operators	Agritourism A number of agritourism operators act as visitor attractions as well as producing value added agriproducts in Vanuatu. These include Tanna Coffee, ACTIV (handicrafts, coconut oil and chocolate), the Summit Gardens and Eden on the River, as well as a small number of farm and garden tours.
Individual Producers	Agricultural Small holders account for more than 75 percent of production and a growing number of semi-commercial producers account for a further 15 percent. An agriculture commercial subsector based on a range of traditional cash crops contributes to around 10 percent of the total agricultural production. The bulk of the semi-commercial subsector activities are located in and around the urban areas. There is limited data on the numbers of growers and where they are located, but enhancing skills, creating efficiency and market access will be key to strengthening linkages between agriculture and tourism.
Major Wholesalers/Suppliers	Fresh Food Besides the local markets, some of the key suppliers include EcoFresh (lettuce, capsicums, tomatoes), NuGrow (lettuce, capsicum, tomatoes), Au Bon Marche (is the dominant importer, retailer, wholesaler) and Vanuatu Direct supports a collective of local growers (60 local Ni Vanuatu growers) who sell their fresh produce to Vanuatu Direct, who then on-sell (mainly corn, greens, kumara, cucumber, tomatoes, and cauliflower). Vate Ocean Gardens are breeding barramundi (4 species), Red Tilapia and Basa fish. Presently, all fish is harvested for the Fiji market due to importation competition in Vanuatu. The Vanuatu Cattle Company & VAL Pacific is a public Company owned by the Vanuatu Government of Vanuatu and private investors that exports natural grass-fed, antibiotic and hormone free beef. The food safety program is run to the same standard as New Zealand MAF. Other food supplies, such as meat, are sourced through the butcheries at Au Bon Marche, Leader Price and South Pacific Meat Supplies (more likely to supply pork, bacon and on rare occasions, lamb). Pechan's Continental Small Goods supplies the niche meat products such as chorizo, bacon, and salami. Dynamic Supply Company in Port Vila is a food and product wholesaler who sources quality products for hotels and restaurants, including some local products (ie from local beef and prawns).
<b>NGOs and Community</b>	
Vanuatu National Council of Women	The National Council of Women (NCW) is the key institution supporting women's development. As the vital role of women in food production, marketing and rural enterprise the NCW will continue to have a pivotal role in supporting gender focused development in the productive sector. The NCW village representatives can be important focal points for capacity building, promotion and awareness activities.

Farmers Organisations and Other NGOs	<p>NGOs have been important vital players in the delivery of productive sector development outcomes. These organisations help ensure grassroots involvement in needs assessment and planning.</p> <p>The Farm Support Association (FSA) provides extension support to assist small-holders to establish farming systems (chicken, goats and pigs) and vegetables, fruit and root crop gardens. In terms of fresh produce, the FSA works with local Ni Vanuatu growers to run trials of fruit and vegetables crops and providing advice in aspects of nursery techniques, disease and pest prevention and provision of seeds.</p> <p>Another farmer support organization is the Syndicate Agricole.</p> <p>Nasi Tuan operates on Tanna and provides training in sustainable agricultural production, value addition and other community development projects</p>
RSE Workers	<p>Increasing numbers (currently in excess of 2,000 annually) of ni-Vanuatu are participating in the recognized Seasonal Worker Schemes in New Zealand and Australia. Finding ways to capitalize on the acquired farming skills of returned RSE workers (as well as potentially using employer expertise from Australia and New Zealand) by sharing and mentoring within communities could bring additional benefits to local agricultural production.</p>
<b>International and Regional Organisations</b>	
The Pacific Community	<p>The Pacific Community (SPC) has been supporting the development of agriculture and agritourism in the Pacific through a number of initiatives. Through the SPC Land Resources Division (LRD) with the support of the EU funded Pacific Agriculture Policy Project, SPC has supported the development of Agricultural Policy Banks, Pacific Community Agritourism Week, strengthening the Pacific Islands Farmers Organisation Network, coordination of agritourism buyer/seller marts, the development of the Pacific Organic Tourism and Hospitality Standard (with POETCom) and its future piloting in Vanuatu.</p>
The Food and Agriculture Organisation of the UN (FAO)	<p>FAO has conducted a number of market and value chain studies to assist Vanuatu in development of the agriculture sector. Currently FAO is supporting Government of Vanuatu with strengthening of the agriculture statistics and research base.</p>
South Pacific Tourism Organisation	<p>SPTO is the mandated regional organization for the tourism sector. SPTO has developed the Pacific Tourism Strategy which highlights the importance of strengthening linkages between agriculture and tourism to reduce leakages and create employment. SPTO has partnered on several country and regional agritourism initiatives including training of local chefs and Pacific Community Agritourism week in Fiji.</p>

CTA	The Technical Centre for Agricultural and Rural Cooperation (CTA) is a joint international institution of the African, Caribbean and Pacific (ACP) Group of States and the European Union (EU). Their mission is to advance food and nutritional security, increase prosperity and encourage sound natural resource management in ACP countries. CTA has played a lead role in initiating and coordinating a number of regional initiatives including the Pacific Agritourism week and the Agribusiness Forum as well as the Agritourism Policy Workshop in Port Vila (2016). CTA has also supported exchanges between the Pacific and Caribbean policy makers and experts.
IICA	IICA has had programmes on agritourism in the Caribbean region since 2002 and has developed a Regional Agritourism Sector Plan. IICA has partnered on several regional agribusiness and agritourism events and was also a partner in the recent Vanuatu Agritourism Policy Workshop.
The Pacific Islands Private Sector Organisation	PIPSO is the regional peak private sector body and has supported agritourism events in partnership with other regional organisations in several countries including partnering in the recent Vanuatu Agritourism Policy Workshop.
<b>Donors</b>	
Regional and National Donor Partners	<p>The Vanuatu primary sectors have received up to USD24m in development assistance for 17 primary industry projects in the period 2000-2012 (approx. USD17.6m for agriculture and forestry; and USD6.2m for fisheries), representing 4 percent of overall ODA to Vanuatu over that period.<sup>20</sup></p> <p>New Zealand was the fourth most significant donor<sup>21</sup> with an 11 percent share of ODA receipts at USD2.54m, directed solely to agriculture activities. France (38 percent on research and extension activities); Japan (23 percent via technical cooperation); Australia (19 percent via PHAMA, PGEP and PARDI); and the EC (9 percent from EDF10) are the other active donors.<sup>22</sup></p> <p>The New Zealand Aid Programme has significant forward commitments to support agriculture; NZ\$ 15 mn (US\$11 mn) has been committed to support the sector in Vanuatu for the period 2012 – 2020. New Zealand is supporting the development of the livestock industry in Vanuatu<sup>23</sup> and vegetable production on Tanna, as well as supporting the development of the Vanuatu Agritourism Strategy.</p>

<sup>20</sup> Open Aid Data Website Link: [http://www.openaiddata.org/recipient\\_country/854/2012/](http://www.openaiddata.org/recipient_country/854/2012/)

<sup>21</sup> Issues Paper – NZ’s Support to Primary Industry in Vanuatu – NZ MFAT

<sup>22</sup> Other smaller donors over the period have included: Canada and United States of America

<sup>23</sup> Activity Design Document; Strengthening Agriculture Value Chains Activity – Stage One – Beef Value Chain ‘Quick Wins’ – June 2016 NZ MFAT

	<p>The European Union is currently programming significant funding (31 mn Euro) under 11<sup>th</sup> EDF to support rural development with a focus on agricultural production including livestock, fresh fruit and vegetables and coconut production. The EU has previously supported agricultural programmes in Vanuatu under EDF10 with a focus on commodity exports.</p> <p>IFC/World Bank has undertaken studies on tourism demand for agricultural products and is working with Carnival Cruise lines to facilitate the sale of local value added agriproducts. IFC also support Vanuatu with the IVS, the Tourism Awards Programme and Chinese market development activities.</p> <p>Several donors are engaged in providing support for the agricultural sector through regional programmes including FAO and DFAT /MFAT (through PHAMA Project). SPC is also heavily engaged in supporting the sector at a regional and national level through a number of programmes including the Pacific Agriculture Policy Project.</p> <p>DFAT though the Skills for Economic Growth Programme (TVET) has piloted some agritourism initiatives and will expand the scope of the programme and funding commitment in 2017 to support implementation of key initiatives under the VAPA.</p> <p>IFAD has recently finalised a new Pacific sub-regional strategy, also focusing on development of the agriculture and rural sector value chain improvements, support for climate-change adaptation and environmental degradation mitigation measures; and better smallholder co-financing solutions. Their strategy proposes investing up to USD30 million from 2014–2018 and includes funding earmarked for Vanuatu but programme delivery details have yet to be confirmed.</p> <p>New Zealand is also the lead donor for the tourism sector and supported the development and implementation of the VSTAP through the Vanuatu Tourism Programme<sup>24</sup> (VTP) that includes support for tourism related infrastructure, marketing, capacity building and product development. Other donors engaged in tourism support include DFAT who have supported tourism marketing activities and small business training through TVET programme, as well as the INTV and PATC hospitality training programmes.</p>
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<sup>24</sup> Activity Design Document: Vanuatu Tourism Programme – VTP – November 2015 NZ MFAT

## **Annex Three - Key Factors, Current Situation and Strategic Implications – Vanuatu Agritourism**





Demand Related Factors	Vanuatu Current Situation	Strategic Implication
The kind of tourism development; type of visitor, accommodation with respect to ownership, class and size	Vanuatu tourism is primarily reliant upon holiday visitors from Australia, New Zealand and New Caledonia. Cruise ship passenger numbers are a key component of the industry. There are only three large hotels (100 rooms+) and newer investment has primarily been in smaller boutique properties and holiday homes. International investment dominates the hotel sector.	Larger international operations may have less flexibility in procurement and menu planning than smaller niche resorts.  The cruise sector has high entry barriers due to operator purchasing requirements.
Maturity of the tourism industry	Vanuatu's tourism sector is relatively small in global and regional terms, centred on Port Vila with limited international marketing and few branded operators. The industry is price sensitive and competes with other regional destinations, particularly Fiji. The restaurant sector is reasonably well developed in both variety and quality, is highly accessible for most tourists and offers competitive advantage over other Pacific destinations.	The variety, quality and depth of the restaurant sector on Efate provides for a competitive advantage for Vanuatu that needs to be more heavily promoted. Opportunities may exist to pilot direct linkages between growers and resorts (which is happening in several of the Caribbean countries).
The degree of promotion for local cuisine	The Vanuatu brand centers on <i>'Discover What Matters'</i> tagline and promotion is centred on the easy access to main markets (Australia/New Zealand), relaxation and authenticity of the local culture and friendly people and the unspoilt island environment. Limited promotion of local cuisine by hotels and restaurants.	The current branding provides a strong umbrella for the promotion of local cuisine as part of a journey of self-discovery and relaxation. There is a need to further incorporate the promotion of local cuisine by individual operators and at a destination level. The current branding could be more fully utilized to promote local food through promotions such as <i>'Discover Local Organic Food'</i> .
Capacity to use local cuisine creatively in hospitality kitchens	Capacity to use local cuisine is limited by inconsistent supply and quality issues. The larger hotels in particular struggle as they cater for a 'mass market', require standardized food inputs and are less flexible than smaller properties. Cuisine in many boutique hotels and restaurants is of a relatively high standard but local cuisine options are limited primarily due to inadequate supply, with limited local wholesalers, who primarily import food products.	The availability of consistent supply at the appropriate quality level and price is the major barrier to increasing the scale of use of domestic agricultural products by the tourism sector.
Supply Related Factor	Vanuatu Current Situation	Strategic Implication

<p>Natural resource base; physical limitations on production (crops, livestock and seafood)</p>	<p>Vanuatu is a fertile environment for agricultural production and the agro-climatic range enables the growing of a wide range of crops as well as livestock. It is estimated that only one third of productive land is utilized. Seafood is also readily available on outer islands but transport inhibits inter island exports. Vanuatu is also one of the most cyclone prone regions in the world, which together with varying drier spells, has a significant impact on primary production.</p>	<p>Vanuatu has high potential for increased primary production to enhance both domestic consumption and linkages to the tourism sector. A focused and sustained approach resilient to climate change needs to be developed to facilitate increased production and consumption. Increased production patterns will increase food security and climate change resilience.</p>
<p>Entrenched production patterns</p>	<p>Production is dominated by semi-subsistence farmers following traditional farming methods. Commercial horticulture is practiced by only a few (mostly expatriate) farmers located in the Port Vila vicinity. Investment is required to modernize production to increase productivity and competitiveness.</p>	<p>Farmers require good technical advice on crop varieties, husbandry practices and farm budgeting. Technical advice needs to be supported with investment mechanisms to facilitate production.</p>
<p>The quantity and quality of local production</p>	<p>There are significant gaps in the quantity and quality of the inputs required by the tourism sector resulting in a high level of imported goods. (see IFC Report above). Local handicrafts are also dominated by imported souvenirs (DoT Survey 2014). Opportunities exist to fill these gaps through enhanced local production.</p>	<p>Supply side gaps in primary production represent the major constraint to increased consumption by tourism operators. There is a low level of understanding the requirements of the tourism sector, particularly at a smallholder level. Support needs to focus on specific product gaps which have been identified through farmer support programmes, improved transportation and market information.</p>
<p>Price competitiveness of locally produced agricultural products</p>	<p>Many fruit and vegetables and local beef can be produced at competitive pricing levels; chicken, eggs and (some) seafood products compete against cheaper imported products. Transportation costs are high and limit the viability of production from many islands.</p>	<p>Accessing funding, capacity of producers and transportation barriers need to be addressed as part of a broader approach to agricultural development as well as the VAS.</p>
<p>Technology and processing limitations</p>	<p>Small holder farmers use basic tools and have limited understanding of technology, including hydroponics and post-harvest handling techniques. Limited facilities exist for handling fresh produce including cold storage and loading/unloading facilities. There are no pack houses available to producers. Farmers have few options to access capital for investment.</p>	<p>Technical assistance is required to support farmer's skills development. Strengthening farmer organisations is a key requirement to increase production efficiencies. Investment is required to modernize farming through innovative funding mechanisms (including through a matching grant/loan facility).</p>

Health and safety standards in practice	Health and safety standards exist but little monitoring of compliance is undertaken and capacity to monitor and enforce is inadequate. Few local products meet international quality requirements for export which also impacts on usage by leading hotels and cruise ship companies.	Quality standards need to be enforced at a local level; international standards are a pre-requisite for the cruise companies and many hotels, as well as potential exporting.
Spatial and temporal patterns of supply (including seasonality in demand and supply)	Supply is highly seasonal for fruit and vegetables. Extreme weather events and sub-tropical climate have a high level of impact upon production and supply. Little evidence of crop production planning.	Cropping seasons need to be extended to achieve year round production through the planting of suitable varieties, the adoption of new farm practices including crop cover during the height of the rainy season, irrigation during drier periods and flower induction technology. Better crop planning and market linkages would greatly enhance farm revenue.
Transport and infrastructure constraints	Inter-island transport is costly and there are limited sea transport services with dedicated food carriage facilities on board and limited storage facilities on many islands. Poor roads in outer islands limit market access to Port Vila and increase costs of transportation. Air services to the three main islands are regular but cargo space is limited due to relatively small aircraft size (ATR) and mainly single service provider.	Options may exist for subsidy of inter-island shipping and improving facilities for storage and handling. Infrastructure improvements need to be closely aligned to enhanced economic activity through the productive sectors.
Land availability/security	A large proportion of land in Vanuatu is estimated to be unsuitable for large scale production, but only one third of cultivable land is currently being farmed. Land availability is limited for small holder production on Efate. Custom land ownership is a barrier to larger scale production on most islands. Security of tenure is an issue for some small holders on Efate.	Consolidation of small scale production will be important to increasing overall productive capacity, together with scaling up larger producers to meet demands of the tourism sector. Policies relating to land security by Government of Vanuatu may be required to strengthen tenure.
Producer training and extension services	Limited producer training and extension services are provided by the Department of Agriculture and NGOs. Government of Vanuatu funding and capacity is inadequate for such services to be widespread. Agribusiness support services (business/marketing) are ineffective due to budget and capacity restrictions and lack of strong farmer organisations.	Strengthening capacity of farmer organisations and networks and delivering practical agribusiness support will be key in sector development. Integration of small holder production (and extension services) into lead producer supply chains may enhance scale and productive capacity.

		Options may exist to engage tourism operators in partnerships with producers to facilitate improved supply.
<b>Market and Intermediary Factors</b>	<b>Vanuatu Current Situation</b>	<b>Strategic Implication</b>
Inter Government of Vanuatu and Public/Private sector coordination and donor support mechanisms	<p>There is a lack of strong producer organisations and farmer associations. Opportunities for further PPPs may exist in areas such as extension services or consolidation of small holder production and scaling up of lead producers.</p> <p>VCCI takes the lead role currently in formal dialogue between the private sector and Government of Vanuatu. No formal mechanism exists for dialogue and interaction between tourism operators and producers.</p> <p>The Government of Vanuatu has established the ATSC to facilitate cross-ministerial coordination particularly between the MALFFB and MCTTI and enhance local production and import replacement. The ATSC has limited private sector representation at present, either for producers or tourism operators (only VCCI represented).</p> <p>A wide range of agencies will be required to support tourism and agricultural development that are cross-sectoral and multi-agency. Overall coordination mechanisms need to consider the options for enhanced coordination across the range of different agencies involved.</p> <p>Donor support is becoming substantial for both the productive sector and tourism sector and will require considerable management and coordination to ensure optimum outcomes are delivered through the available resources. The New Zealand Government of Vanuatu is currently supporting coordination of the VSTAP through the DoT.</p>	<p>Stronger dialogue is required between the tourism industry operators and producers to exchange knowledge in relation to market demands and potential supply capacity and options to support crop planning and quality improvements.</p> <p>Creation and strengthening of farmer groups is required to support enhanced productive capacity.</p> <p>The ATSC needs to support and closely monitor the priorities identified through the VAS and to support implementation through budget support. Increased private sector representation on the ATSC would enhance public/private dialogue and engagement.</p> <p>MALFFB capacity needs to be strengthened to facilitate sector management and coordination of programmes and donor inputs.</p> <p>Strong cross agency (not only across tourism and agriculture, but in key policy areas of transport, business support, import duties and incentives and budgetary support) as well as public private coordination is required. Options to enhance coordination and engagement should be further considered.</p>
Policy frameworks	The Government of Vanuatu has developed a number of policy frameworks for the Productive Sector as well as tourism. The	There are a number of productive sector policies in place that need to be clearly prioritised within available resources

	development of the VAS will provide a specific roadmap for to strengthen linkages and synergy between the two sectors.	to support targeted outcomes. Some existing sector plans are wide ranging and require greater targeting of priorities.  There is also a need for enhanced policy support in specific areas including research and statistics, regulations and incentives.
Grower support/industry organisational capacity	Limited grower organization in place; support to growers is provided through NGOs and with donor assistance. Existing private sector peak bodies have limited capacity to deliver business or producer training. Tourism associations are established for hotels (VHRA) and tour operators (VTOA) but have limited funds and capacity constraints.	Opportunities to better connect hotels and restaurants to growers should be further explored both through clusters and through individual business partnerships. Industry associations and groups need to be strengthened and supported with technical advice and market intelligence. New Zealand Government is currently supporting tourism industry associations through the VTSP.
Wholesaler/consolidator availability and capacity	This part of the supply chain is very weak. The market is dominated by one major wholesaler/importer/retailer. Local markets act as central points for sales but no quality control grading and weighing of produce in place and sanitary conditions are poor.	Wholesalers offer advantages to tourism operators in terms of volume, consistency and quality of goods and single point of entry.  Development of product wholesalers/consolidators requires support to enhance smallholder production and facilitate stronger linkages to the tourism sector.

## Annex Four – List of Documents Reviewed

Document
Activity Design Document: Strengthening Agriculture Value Chains Activity; Stage One 'Quick Wins' – June 2016 – NZ MFAT
Activity Design Document; Vanuatu Tourism Programme (VTP) November 2015 – NZ MFAT
Agricultural and Tourism Linkages in Pacific Island Countries – Samoa and Tonga – FAO - 2012
Agricultural Concept Note Addendum NZ MFAT
Agricultural Value Chain Guide for Pacific Countries – CTA/KSP/SPC - 2014
Analysis of Coconut Value Chain in Vanuatu - 2015 – Transtec/European Union
Agribusiness Forum; Linking the Agrifood Sector to Tourism Related Markets – CTA, PIPSO and SPC - 2015
Climate Change and Agriculture in Vanuatu – 2013 - FAO
Cocoa Value Chain Mapping and Analysis – NZ MFAT
Consolidated Responses for the PAFPNet Discussions – Linking Farmers to Tourism Markets – SPC – May/June 2015
Feasibility to Increase Local Agricultural Produce in the Tourism Supply Chain in Vanuatu – FAO - Peter Napwatt - 2014
Fruits and Vegetables Sector Value Chain Analysis Report – 2015 - FAO
Global Trends and Caribbean Experiences: Sharing Policy Initiatives with Vanuatu – Ena Harvey – IICA – Presentation - June 2016
Inclusive Tourism – Linking Agriculture to Tourism Markets – ITC - 2010
Investing in Agrotourism Development in the Caribbean Region -2013 - IICA/CTA/CARICOM
Linking farmers to markets: Improving opportunities for locally produced food on domestic and tourist markets in Vanuatu - A value chain study for chicken and fresh fruits – FAO - 2014
Ministry of Agriculture Livestock Forestry Fisheries and Biodiveristy (Vanuatu) – Corporate Plan – 2014 - 2018
National Trade Development Committee – VCCI Role and Way Forward - 2015
Overarching Productive Sector Policy 2012 – 2017 – Government of Vanuatu
Overview of Agritourism Initiatives in the Pacific – SPC Presentation – June 2016
Overview of Three Agritourism Events in the Pacific – SPC/SPTO/USP - 2015

<b>Pacific Agriculture Policy Digest – SPC – July 2015</b>
<b>Pacific Agribusiness Forum – Linking the Agrifood Sector to Tourism Market – Draft Outcomes Paper – CTA 2015</b>
<b>Policy Setting for improved linkages between agriculture, trade and tourism – Highlights of the (Port Vila) Workshop – 25 – 27 May – CTA – Draft Report</b>
<b>Strategic Plan for regional development – Background Study Regional Agrotourism Policy – Ena Harvey IICA - 2010</b>
<b>Tourism-agricultural Linkages; Boosting inputs from local farmers – Pro-Poor Tourism Brief No 3 – DFID</b>
<b>Vanuatu Agriculture Sector Policy – 2014 – 2024 - Government of Vanuatu</b>
<b>Vanuatu Agritourism Linkages: A Baseline Study of Agri Demand from Port Vila’s Hospitality Sector – IFC 2015</b>
<b>Vanuatu Agritourism Steering Committee – Terms of Reference – Government of Vanuatu - 2016</b>
<b>Vanuatu Beef Value Chain Analysis –NZ MFAT - 2014</b>
<b>Vanuatu Cattle Sector Value Chain Analysis and Proposed Strengthening Project Report – NZ MFAT 2015</b>
<b>Vanuatu Domestic Market Study – The Potential Impact of Increased Tourism Numbers on the Domestic Market for Selected Vegetable Products – FAO - 2011</b>
<b>Virgin Coconut Oil Value Chain Mapping and Analysis -Samoa and Vanuatu – Dr Martin and Landon Lane- 2014</b>
<b>Vanuatu Fruit and Vegetable Sector Value Chain Analysis – FAO - 2015</b>
<b>Vanuatu Household Income and Expenditure Survey - NSO</b>
<b>Vanuatu National Livestock Sector Policy Action Plan 2015 – 2030 - Government of Vanuatu</b>
<b>Vanuatu Opportunity Analysis on Fair Trade and Organic Niche Markets – 2012 – Cardno Agrisystems Consortium</b>
<b>Vanuatu International Visitor Survey – 2014/2015 – IFC/NZTRI/AUT</b>
<b>Vanuatu Priority Action Agenda 2006 – 2014 - Government of Vanuatu</b>
<b>Vanuatu Statistics Update – Merchandise Trade Statistics – December 2015 Highlights - VNSO</b>
<b>Vanuatu Statistics Update – International Arrival Statistics – December 2015 Highlights - VNSO</b>
<b>Vanuatu Trade Policy Framework – 2012 - Government of Vanuatu</b>
<b>Vanuatu Statistics Update – Merchandise Trade Statistics – December 2015 Highlights - VNSO</b>

## Annex Five – List of Individuals Consulted

Contact	Organisation/Position
<b>Government of Vanuatu</b>	
Howard Aru	Director General - MALFFB
George Borugu	Director - Department of Tourism
Kathy Stephens	Tourism Officer – Department of Tourism
Elam Didas	Tourism Officer – Department of Tourism
Janet Tambeana	Principal Tourism Officer – Department of Tourism
Eddie Didas	Tourism Officer – Department of Tourism
Brenda Andre	Cruise Tourism Officer – Department of Tourism
William Mala	Officer – Department of Tourism
Linda Kalpoi	General Manager – Vanuatu Tourism Office
Megan Thompson	Marketing Adviser – Vanuatu Tourism Office
Paul Fred	Chairman – Vanuatu Tourism Office
Jill Horry	REDD - Department of Finance
Presley Dovo	Department of Forestry
Arina Neirove	Principal Officer Department of Cooperatives
Brittien Yosef	Registrar Vanuatu Intellectual Property Office
Merilyn Temakon	Principal Officer Vanuatu Intellectual Property Office
Ridley Joseph	Director Department of Cooperatives
Marokon Alilee	Director General - MTTICNVB
Noel Kalo	Director - Department of Industry
Hannington Tate	Director Department of Forestry
Timothy Tumukon	Director Department of Biosecurity
James Wasi	Acting Director Department of Agriculture
Roan Lester	Acting Director - PM's Office
Geoff Hyde	Programme Manager VSTAP
Lucy Kapp	Project Officer VSTAP
Mary Oreilly	Santo Discovery Trails Manager
Kay Clarke	Business Adviser DoT SANMA Province
Lucy Kapp	TVET Programme Officer
Kahanna Andrew	DoT Officer SANMA
Jack Lowane	Policy Coordinator MTTICNVB
Jimmy Kawiel	DoT Officer TAFEA
Watson Lui	Officer - Department of Forestry
Ruth Amos	Vanuatu Food Technology Centre
Joe Timothy	General Manager - Vanuatu Agricultural College
Muriel Degobert	Vanuatu Agricultural Research and Technical Centre
Chris Ratcliffe	Adviser - Vanuatu Agricultural College
Alsen Obed	Department of Fisheries SANMA Province
Bitalio Bororoa	Department of Agriculture SANMA Province
Dick Tomker	Department of Forests SANMA Province
Lonny Bong	Department of Livestock
Tekon Tumukon	Biosecurity Vanuatu
Nambo Moses	Department of Livestock
Minnie Edmanley	Officer - Vanuatu Investment Promotion Authority
Mark Vurobaravu	Department of Agriculture - DARD
Britien Yosef	Vanuatu Intellectual Property Office



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<b>Private Sector</b>	
Pierre Marais	Owner - Ecofresh Vanuatu Ltd
Alfred Loli	Owner - Loli Enterprises Ltd
Pascal Gavotto	Owner Fatumaru Lodge and TVET Tourism Adviser
Jimca Loli	Manager – Loli Enterprises Limited
Linda Trenkner	Partner - Volcanic Earth
Cornelia Wylie	Owner - Vanuatu Direct Ltd
Jim Batty	Owner – The Summit
Carolyn Ernst	Co-owner - Eden on the River
Votausi Mackenzie-Reur	Owner - Lapita Café
Bryan Death	VTO Board Member and Board Member VHRA
Mark Neil Jones	Owner – The Secret Garden
Blake Cropp	General Manager - Dynamic Supply Ltd
Miriam Malao	Port Vila Mamas Market Representative
Abok	Chef - Iririki Hotel
Fernando	Chef - The Melanesian Hotel
Terry Addlington	Managing Director - Tanna Coffee Ltd
Stephen Bartrop	Managing Director - The Summit Gardens
Michael Ouze	Owner - Vanui Vanilla Santo
Dave Cross	Espiritu Santo Tourism Association Board Member
Tal Milfirer	Former Owner Ecofresh Ltd
Monique	Purchasing Officer Le Lagon
Vicki Joe	Law and Partners/ Vanuatu Organic Paradise
Hugh Lowe	Owner Tanna Lodge
John Marsh	Owner Tanna Whitegrass Resort
Lucas Rotteveel	Manager - Poppys on the Lagoon
Julia King	Director The Kava House
James Black	Food and Beverage Manager Le Lagon
Brian Death	VTO Board Member and VHRA
Ken	Owner - Toa Chickens
Seth Kaurua	Tanna Farms
John Lott	Principal - Aore Coffee
Tyrone Mann	Chef
<b>Donors</b>	
Kirk Yates	New Zealand Aid Programme Development Manager Vanuatu
Kathryn Beckett	Development Counsellor New Zealand High Commission
Jimmy Nipo	Programme Officer NZHC
Ricky Lee	Programme Officer NZHC
Dina Nicholls	Manager Pacific Tourism Programme IFC
Becky Last	Tourism Adviser IFC Vanuatu/Solomon Islands
Yoko Asano	JICA
<b>NGOs</b>	
Adam Trau	Economic Analyst - World Vision
Fiona Morris	Communications Adviser - UN Women Markets for Change Project
Morris Kalarat	Project Manager - UN Women Markets for Change Project
Elizabeth Faerua	CEO – Oxfam Vanuatu
George Bumseng	CEO - Farm Support Association
Jill Greenhalgh	Adviser - Farm Support Association
Sandrine Wallace	General Manager - ACTIV Association
Fanny Cyrel	Port Vila Market Mamas representative
Jeffrey	Nasi Tuan Tanna

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Charlie Harrison	Secretariat - PANGO
<b>Others</b>	
Mereana Mills	VTIP Consultant
Andrea Giacomelli	Consultant – EDF 11 Design and Programming
Adela Issachar Aru	Programme Officer – DFAT Vanuatu
Cheryl Thomas	Policy Research Officer Pacific Community
Vili Caniogo	Manager – Pacific Community
Tim Martyn	Policy Officer FAO
Ena Harvey	Representative IICA
Isolina Boto	Agribusiness Project Manager CTA
Henry Sanday	Private Sector Development Adviser - MSG Secretariat
Lucy Battaglione	Adviser - Skills for Economic Growth (TVET)
Anna Gilbert	Adviser – Skills for Economic Growth Project
Leith Veremaito	Former PHARMA Country Manager