



MINISTRY OF AGRICULTURE, FORESTRY AND FISHERIES NATIONAL POLICY & STRATEGIC PLAN SUMMARY BOOKLET 2006



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MISSION STATEMENT

To develop the agricultural sector to ensure increased production of quality food and other commodities through environmentally sustainable management practices for the benefit of the entire population





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The strategic importance of the agricultural sector within the broader context of sustaining sound rural livelihoods and economic diversification cannot be overemphasized. It has been recognized that despite the many converging challenges,

the agricultural sector remains one of untapped opportunities and limitless potential. This new policy on agriculture forestry and fisheries, along with the associated strategic plan seeks to demystify the innumerable difficulties previous political administrations have had within the last two decades.

Unlike before, this policy notes and appreciates some of the inevitable existing and emerging hurdles brought about by globalization, trade liberalization and loss of preferential trading arrangements, changing market competitiveness due to continuous innovation and advanced technology, such as biotechnology. More significantly, the policy and strategic plan lays the foundational platform for the re-positioning and

- FOREWORD -

realignment of the sector by seeking to modernize the environment for doing business for all types of agro enterprises, but more specifically with due consideration for the smaller and vulnerable agricultural producers, artisanal fishers, including the youth.

Notwithstanding, there is the need for the emerging generation of agri-entrepreneurs to adopt a new mindset and vision of the sector. No longer must the sector be visualized or be perceived from limited banana industry and economy framework. Agriculture forestry and fisheries must be viewed as a boundary less avenue of business opportunities targeting both the food and non-food sectors, with the emphasis on continuously increasing qual-

ity and value to commodities, competitiveness and profitability. The government has already developed an incentives regime to facilitate such initiatives. Moreover, the sector has the overall function of contributing to food security, economic diversification and competitiveness through the sustainable use and management of our limited and finite natural resources. To achieve these, it is necessary that we restructure and reengineer our institutional and legislative enabling environment; our public agencies, producer groups and organizations must be redesigned to facilitate and engage in agri-business. This is the essence of this new policy on agriculture, forestry and fisheries, but with a responsible approach.

- STATUS OF THE AGRICULTURAL SECTOR -

Agriculture continues to be a critical sector of the island's economy and although its contribution to GDP has been steadily declining over the last 10 years it continues to play a significant role in the country's socio-economic development and contributes roughly 4.48% to GDP (2004). The past ten years has shown an increase of food imports & a reduction in food

exports due to the decline in the banana industry and the steady growth in tourism activity. The changes in the banana sector has had varying indirect impacts on non banana agriculture.

In the agricultural sector banana production occupies the largest share of land under cultivation (48%). Coconut, the next major crop, occupies about 42% of agricultural land. Other



crops produced include cocoa, vegetables and herbs, other fruit and tree crops and cut flowers.

The livestock sector is small and dominated by the poultry and pork sub-sectors.

Bananas

The banana industry in all the Windward Islands has seen a significant downward slide over the past 10 years. This has been generally attributable to changes in the traditional preferential market access associated with the new tariff-based EU trade regime, price fluctuations, and re-structuring of the local industry, and impacts of successive weather related problems that include storms, drought and pests and diseases. There was a steady decrease in exports of bananas from approximately EC\$128 million in 1995 to EC \$53 million in 2004.



Cocoa & Coconuts



Cocoa production has steadily fallen, in spite of guaranteed market access and an above market price for cocoa beans offered by World's Finest Chocolates. Erosion of this industry has been attributable to conversion of traditional estates into smaller banana farms and the deterioration of existing plantations on account of age and increased pests and diseases attacks. Currently, production is on the upsurge as new investments in rehabilitation bear fruit.

Copra production has seen a similar downward trend. It must also be noted that the demand for fresh nuts has steadily grown, however this statistic is not currently captured. The majority of coconut plantations have aged and their management has been adversely affected by a much reduced pool of agricultural labour and impacts of pest and diseases



Non Traditional



Non-traditional crops are relatively minor in overall economic contribution to agriculture. The main categories are vegetables, fruit/tree crops,

food/root crops, condiments (herbs/spices) and flowers/ornamentals. A wide variety of vegetables is commercially grown mainly for supply to the

domestic hotel and retail markets. The greatest production levels are in tomato, cabbage, lettuce, water melons and hot peppers, the latter of which is

also exported. In the fruit/tree crop category, mango, breadfruit, citrus, avocado constitute the highest volumes. Mango and breadfruit rank among the highest volumes exported to regional markets and the UK. Dasheen, yam, and sweet potatoes are the main crops in the food/root crop category. The predominant condiment crops are thyme, rosemary, parsley and celery. Bananas and plantain (Musa varieties) are also sold to the retail and hotel markets. The past ten-year period saw a general increase in the value of produce purchased by major supermarkets and hotels. In 2004 purchases were valued at EC \$3.2M compared to EC \$2.9M in 1995. The horticultural (cut flowers) sector is small but growing, both domestically (special events & hospitality) and in the regional markets. There is great potential for business expansion & new investments, but production reliability and predictability needs improvement.

Poultry-Eggs and Chickens



This sub-sector has seen significant increase in production over the past ten years. The average number of laying stock

increased from 48,000 in 1994 to 57,000 hens in 2004. The industry currently meets domestic market demands and in

2004, 903 thousand dozen eggs were produced. Three poultry processing plants are currently in operation. There has been a

general increase in the volume of chicken produced locally; from 1 million lbs in 2002 to just over 1.5 million lbs in 2005.

Pork

The pork sub-sector has also witnessed growth, with estimated production increasing by 5%

over the period 2002 to 2004 (MAFF), from 185,052 pounds in 2002 to 203,700 pounds in

2004. Hotels and supermarkets are the main markets for fresh pork. There is also some value-

added in terms of processed hams, bacon and sausages sold by local supermarkets.



Small Ruminants (Sheep, Goats and Rabbits)

Production has been steadily increasing although that seg-

ment of the livestock industry remains relatively small. The

bulk of the production is distributed through informal markets;

hence limited data is available on long-term trends.



Fisheries

Fisheries has experienced a general positive growth over the past 10 years, facilitated by the continued investment in larger boats, fish landing infrastructure and improved fishing methods such as long-lining and fish-aggregating devices (FADS). Dolphin, Tuna, Wahoo and Snapper are the most common fish species caught. While, Lobster and Conch constitute the major species harvested in the near-shore fishery, along with parrot fish, groupers and squirrel fish which are caught through seine and pot fishing.



Aquaculture



Aquaculture production has remained relatively constant in recent years with an esti-

mated 1017.3 kilograms of fish and shrimp being produced in 2000, which decreased slight-

ly to 991 kilograms in 2004. Shrimp production accounts for about 15% of total produc-

tion. In 2004, approximately 17 acres were under active production.

Forestry



Commercial timber extraction from Government forest reserves and private forests is a very small-scale activity, primarily targeting the local furniture industry. Honduras Mahogany, Blue Mahoe, Teak, White Cedar, Acajou, and various Lauri-

er species are the most commonly extracted. The existing forest reserve continues to play a critical role in the conservation of the island's main water catchments, soil and water resources and biodiversity in general. The Forestry Department produces fence posts



from its plantation thinning operation. The major types of non-timber forest produce (NTFP) utilized include bamboo, which is used extensively as props in

the construction industry, latané palm leaves for local broom making, along with a variety of lianas and grass species used in the handicraft (weaving) industry.

Bio-Diversity

St. Lucia's biodiversity, its flora and fauna are uniquely adapted to the environment and several species are endemic (that is, found nowhere else on the planet and a large number are regional endemics). Development in all sectors of the economy (agriculture, tourism, manufacturing), coupled with gradual expansion of settlements, has affected many natural habitats mainly along the coastal areas and changed the native species mix, particularly with the

introduction of alien invasive species (rats, mongoose, in the recent introduction of the Giant African Snail). The forest reserves in the central part of the island and the relatively uninhabited dry forests along the north-east coastal zone are now important reserves for many rare and endangered species. The down-turn in the banana industry has resulted in a reduction in the rate of deforestation in the interior areas, however, the coastal zone continues to be under increas-



ing pressure due to infrastructural development to meet settlement and commercial needs

associated with the expansion of industrial, hospitality and other service sectors.

- CHALLENGES TO THE SECTOR -

The agricultural sector in St. Lucia is characterised by several challenges among which include:

- The prevalence of small-scale agriculture which is characterized by uneconomical and highly fragmented/ individualized production units;
- The limited use of improved technologies and the low rate of adoption of technological advances;
- The limited marketability of both traditional and non-traditional agricultural products;
- The situation of food insecurity and rural poverty;

- The reduction in the income earning capacity and employment in agriculture;
- Poor natural resource management and fragile ecosystems;
- Aged and aging producer population, weak producer organizations and limited infrastructural and risk management support system and inter-sectoral linkages and limited investment/business management capacity.

These challenges militate against potential expansion and growth of the agricultural sector, while encouraging inefficiency and lack of com-



petitiveness within the sector. Government's role in fostering agricultural development focuses on creating an enabling environment to promote a stable investment climate that will enhance the commercialisation

of the domestic agricultural sector. The agricultural policy and strategic plan seeks to provide the framework and guidelines for an environment which facilitates investments and long term growth in the sector.

- OUR VISION OF THE AGRICULTURAL SECTOR -

Given the inevitable challenges and opportunities occasioned by the process of globalization and trade liberalization, as well as the new realities of more competitive markets, the sector must embrace a mission that speaks to

issues of efficiency/competitiveness, equity, sustainability and alternative livelihoods. In this regard our vision for the sector is:

To sustain a diversified national income base from agriculture, forestry and fisheries

and enhance the integrity of rural livelihood systems; by generating the capacity for efficiency and the competitive production and marketing of respective goods and services.

This sector vision will be pursued within the broad

framework of a liberalized global trading environment and national economic and social goals, rural development, food security, natural resource conservation, with emphasis on (sustainable use and management, and gender equity.

- Policy Framework -

In response to the noted challenges, the Ministry of Agriculture, Forestry and Fisheries will seek to achieve the following broad objectives:

1. Increase the efficiency and competitiveness of agriculture: A major challenge lies in the transformation of producers into efficient and competitive entrepreneurs. It is in so doing, there will be growth in the financial and economic viability of agricultural production and marketing activities in an increasingly competitive trading environment. The con-

solidation and strengthening of producer groups, the more effective use of resources, modern appropriate technologies and services within a commercialized environment to enhance productivity, predictable and reliable production and income

are important outputs to help drive and achieve increased efficiencies and competitiveness. The facilitation of credit access, risk management and supporting incentives regime and easy access to marketing and business related information are also critical. The following key strategies are proposed: (a) Promote Commercialized Farming; (b) Facilitate Agricultural Credit Access; (c) Support Producers' Organizations.

2. Promote the adoption of improved appropriate technological packages: In an effort



to ensure competitiveness and decrease the costs of production, marketing of agriculture, fisheries and forestry goods and services, new technologies will be adapted to improve agricultural research and technology adoption and modernisation of

the extension services.

3. Expand and diversify agriculture, forestry and fisheries production, value-added goods & services and general market base: Declines in the country's principal export (bananas) signals the need for

urgent diversification of agricultural production and market base. As such the Government of St. Lucia hopes to: Expand external trade, reform domestic markets, strengthen regulatory services, foster product diversification and value-addition agro-processing.

These initiatives, it is hoped, will allow our more active participation in the new global economy and increase market access for the country's agricultural goods and services.

4. Enhance the National Food Security status: St. Lucia is very dependent on food imports to supply both the domestic and expanding visitor population. The country presently spends more foreign exchange importing food than it earns from the export of food. Government intends to increase St. Lucia's reliance on domestic agriculture and fisheries and increase the consumption of locally produced foods. It is hoped that this policy will increase our reliance on domestic agriculture, forestry and fisheries, for the supply of adequate, safe and nutritious food to increasingly satisfy the national demand for food.

5. Generate new opportunities for income and employment in the rural areas:

In order to encourage the growth of income and employment, through new opportunities for profitable enterprises in agriculture, government intends to pursue enterprise and entrepreneurship building, improvements in technology, sustainable development, and other related interventions. Trade liberalization need not be seen as all negative, because it can lead to a more efficient and competitive sector which can encourage the development of viable rural enterprises.

6. Conserve the natural resource base: Effective management/use of the natural resources is very important to the sustainable development of St.Lucia. This applies not only because of the importance of these resources in the productive sectors, but also because they are important in enhancing the environment. A water resource policy in agriculture attempts to ensure the equitable and efficient utilization of water to in-



crease agricultural productivity. The government will provide programmes that: ensure everyone understands the importance of conservation and sustainable use of natural resources which will eventually lead to increased

soil protection and fertility and the efficient use of water; promote more effective links between all stakeholders to ensure that the incentive structures for agriculture supports sustainable resource use.

7. Legislative and policy review and reform: will be undertaken by government to ensure an enabling environment that promotes internationally competitive agricultural, forestry and fisheries sectors

