

Pacific Agriculture and Forestry Policy Inventory



Report Commissioned by SPC under the Pacific Agriculture Policy Program, and prepared by:

Bruce Chapman

April 2015

Pacific Agriculture and Forestry Policy Inventory

Table of Contents

Executive Summary.....	iii
1. Introduction.....	1
2. Developing the Inventory.....	2
3. Inventory analysis.....	6
Methodology.....	6
Common Regional Themes and sub-categories.....	9
Food Security.....	9
Economic Development.....	11
Sustainability and resilience.....	16
Effective Institutions.....	18
Other issues	20
4. Conclusion and Next Steps.....	24
Annexes.....	26
A. Terms of Reference	
B. Questionnaire	
C. Inventory Matrix	
D. Analysis spreadsheet	
X. Commodities	
X. Legislation	
X Process to Develop Sector plans	

Executive Summary

An inventory of Pacific Island countries' national level agriculture and forestry policies has been prepared as part of the Pacific Agriculture and Policy Program (PAPP). Source documents were identified for 15 Pacific Island countries. Six countries have current national agriculture sector policies or strategies. For others, national guidance for the agriculture sector is through agriculture agency plans, or the agriculture content of national development strategies.

There is no common format for the plans/strategies; each is based on the needs and circumstances of each country. Although the documents differ in character and content across the different countries, there are some common themes and concerns. The content of the agriculture plans was analysed at two levels. An initial review of national priorities, as defined in the respective national documents, identified four common thematic areas for the Pacific Islands region:

- Food Security
- Economic Development
- Sustainability and resilience
- Effective Institutions

Secondly, the documents were reviewed in detail to identify sub categories of common interest within these four themes.

Under **Food Security**, the most common issues identified were: a) nutrition; b) reducing dependence on imported food, and c) making use of traditional knowledge and practices.

A large proportion of the national plan content was focussed on **Economic Development**, a range of common issues were identified within these groupings: a) access to credit/finance; b) local markets; c) trade; d) adding value; e) crop and livestock improvement; f) infrastructure (processing and transport); g) Private sector role; h) Rural livelihoods and the capacity to participate, and i) Land access and tenure arrangements.

Under **Sustainability and Resilience**, the review highlighted: a) soil and water; b) biosecurity /pests and diseases, and c) organic agriculture.

Two key areas were identified under the theme of **Effective Institutions**: a) government policy and regulatory frameworks, and b) delivery of services, particularly extension services, training, research and development, and agriculture statistics.

The common areas of national interest align strongly with PAPP objectives. There are opportunities for the Project to provide support in the areas of:

- National Policy Development
- Local Markets and Marketing
- Data / Statistics
- Climate Change
- Niche Products, Organics and Certification.

Pacific Agriculture and Forestry Policy Inventory

1. Introduction

The Secretariat of the Pacific Community (SPC) and the European Union are working together through the Pacific Agriculture Policy Program (PAPP) to support agriculture objectives in the Pacific Islands region. The PAPP aims to deliver the following results:

Result 1: Strengthen regional agriculture development strategy

Result 1.1 *Enhance the capacity of the SPC LRD Policy Support Unit to support the development and implementation of national and regional agricultural and forestry sector policies*

Result 1.2 *Enhance the capacity of SPC to provide ongoing support to national authorities to improve their systems for collecting agricultural statistical information*

Result 2: Improve the dissemination and adoption of applied agricultural production research technologies

Result 2.1 *Improve the dissemination of field research, good practices and technical exchange including climate change adapted research technologies*

Result 2.2 *Improve the food security of small-holder agriculture by facilitating the adoption of locally produced animal feeds and improved land management techniques households (sic), in cooperation with national extension services and communities*

Result 3: Contribute to agricultural enterprise development through improved market linkages

Result 3.1 *Improve the capacity of small-holder farmers to link to markets through Farmer Associations*

To support this work, SPC has commissioned an Inventory of key national-level agriculture/forestry policies in the participating Pacific Island countries¹. As elaborated in the Terms of Reference (attached as Annex A), the inventory has two parts:

- a) A Matrix providing summary information on national plans/policies
- b) Analysis of the national documentation to identify gaps in knowledge, shared priorities, opportunities and challenges, and areas for future consideration.

Together these two elements are to provide information on:

- Status of the plan (i.e. in development, current):
- High priority areas (including commodities and issues) and specific linkages of these priorities, if any to national development plans;
- Identification of common priorities across existing policies;
- Challenges and opportunities for agricultural industries;
- Policies or programs adopted under the plans and frameworks;
- The types of evidence used to develop the plans and frameworks;

¹ The 15 PAPP countries are: Cook Islands, Fiji, Kiribati, Marshall Islands (RMI), Federated States of Micronesia (FSM), Nauru, Niue, Palau, Papua New Guinea, Samoa, Solomon Islands, Tonga, Tuvalu, Vanuatu and East Timor

- If available, key technical competencies that currently exist within the Ministry of Agriculture
- Processes used to develop the plans and frameworks; and
- Plans and responsibilities for implementation.

The inventory is to provide information to underpin PAPP objectives, in particular results 2.1, 2.2 and 3.1 cited above, and will be made available to all SPC member countries through a website or portal hosted by SPC.

2. Developing the Inventory

Scope and coverage

The Terms of Reference require the inventory to focus on National agriculture sector documents (in the form of policies, plans, strategies, frameworks, or agendas as may be the case) that identify and describe national agriculture sector priorities. Further; ‘plans, policies or programs that focus on single commodities or specific issues are not the focus of this review’.

The inventory covers the 15 participating PAPP countries being: Cook Islands, Fiji, Kiribati, Marshall Islands, Federated States of Micronesia, Nauru, Niue, Palau, Papua New Guinea, Samoa, Solomon Islands, Tonga, Tuvalu, Vanuatu and East Timor.

Process and schedule

The inventory was developed over the period November 2014 – February 2015, using documents available at that time. The process involved:

- Development of a questionnaire on national policies circulated by SPC to PAPP contacts in late November 2014. A copy of the questionnaire is attached as Annex B.
- Participation in the PAPP inception meeting held in Nadi, Fiji over 3-4 December 2014. The agenda for this meeting incorporated a presentation on the Inventory, and country presentations from participating countries on national agriculture issues, challenges and plans.
- Desktop review of national agriculture strategies and associated national planning documents.
- Draft report, including matrix, provided to SPC for feedback
- Report finalised March 2015.

Information Sources

The inventory is based on the following sources of information:

- a) National plans and policies were used as the primary source of information to build the matrix and inform the analysis:
 - i. Current Agriculture Sector or Policies/Plans (including those in near-final version awaiting formal approval);
 - ii. If no current sector plan is available; Current Agriculture agency annual or business plans, or
 - iii. Other relevant policies/plans, such as national development plans that include an agriculture component, or the most recent non-current sector plan available.

- b) Information from country representatives was used to supplement the above and provide additional background information to guide the analysis:
- i. Questionnaires completed by country representatives to assist the inventory (Annex B)
 - ii. Country presentations delivered at the PAPP workshop held in Nadi, Fiji 3-4 December 2014
 - iii. Discussions with country representatives during the PAPP workshop held in Nadi, Fiji 3-4 December 2014
 - iv. Follow-up discussions with country representatives via email.
- c) Other sources were used to provide basic country information (land area, population etc) as appropriate.

Limitations relating to source documents

The aim of the inventory is to present data from a complete set of current national agriculture sector strategies to enable a direct comparison of issues and priorities across the Pacific Islands region. However there are a number of factors which have limited the ability to present complete information and make direct comparisons.

The first set of factors relates to the status of plans and strategies:

- not all countries have (or have seen the need for) stand-alone agriculture sector strategies and plans. The plans reflect the different country needs and circumstances, including capacity limitations, and biophysical environments (land area, soils, climate etc) as well as the availability of resources and support.
- where countries have plans, they may be outdated, in the sense that they may have been drafted some time ago, or may have expired (i.e. their nominal term has concluded) but not been replaced;
- in some cases countries have draft plans in preparation that are not available for wider distribution prior to formal government approval.

The second set of factors relates to the form and content of national planning documents:

- There is no standard form for plans and strategies, and the scope of such plans and level of detail presented varies widely from country to country.
- This is even more the case for documents used for reference in the absence of national sector plans, for example:
 - o National sustainable development plans may have agriculture content, but it tends to be limited to high level aspirations relating to national economic, environmental and social goals
 - o Agency plans tend to focus on issues of organisational detail (often based around business units of the organisation) and do not always include a systematic presentation of national sector-level objectives and priorities

The plans also have different clustering of sectors and sub-sectors; present different combinations of agriculture, fisheries, and forestry, and at times give separate consideration to sub-sectors (horticulture, livestock etc) or commodities (sugar, vanilla, root crops etc).

In short the source documents differ greatly in terms of their level of coverage/detail, their audience, and the scope of the sectors under investigation. A summary of the national policy/sector plans and source documents is provided below.

Table 1:PAPP Inventory - Summary of source documents and review timeframes					
Country	Title of Document [type of document]	Type of document	Status	Mid-term review	Terminal review
Cook Islands	Ministry of Agriculture Business Plan 2014/15 <i>Matairangi Purea</i>	Agriculture agency business plan	Current		
Fiji	Fiji 2020 Agriculture Sector Policy Agenda "Modernizing Agriculture"	National agriculture sector policy	Current	Mid-term (2017)	End term (2020)
FSM	Federated States of Micronesia Agriculture Policy 2012 - 2016	National agriculture sector policy	Current		
Kiribati	Agriculture and livestock Division Agriculture Strategic Plan 2013 - 2016	Agriculture agency strategic plan	Current	Mid-term	End term (2016)
Marshall Islands	Agriculture: Ministry of Resources and Development Strategy and Action Plan 2005 – 2010	Agriculture agency strategy	Most recent		
Nauru	National Sustainable Development Strategy 2005-2025 (as revised 2009)	National Sustainable Development Strategy	Current	2009	End term (2025)
Niue	Niue National Strategic Plan 2009 - 2013 <i>Niue ke monuina, A prosperous Niue</i>	National Sustainable Development Plan	Most recently available		
Palau	Bureau of Agriculture Strategic Plan FY 2014-2019	Agriculture agency strategic plan	Current		End term (2019)
PNG	National Agriculture Development Plan 2007 - 2016: "Growing the economy through agriculture"	Nation Agriculture sector plan	Current		End term (2016)
Samoa	Agriculture Sector Plan 2011 - 2015 "...farming and fishing first..."	National Agriculture sector plan	Current		2014-15
Solomon Islands	National Agriculture and Livestock Sector Policy 2009-2014	National Agriculture sector policy	Most recent		
Timor-Leste	Timor-Leste Strategic Development Plan 2011 - 2030	National development plan	Current		
Tonga	Ministry of Agriculture & food, forests and fisheries Corporate plan 2014/15 - 2016/17	Agriculture agency corporate plan	Current		
Tuvalu	<i>Te Kakeega II</i> National Strategy for Sustainable Development 2005 - 2015 including Mid-Term Review: Action Plan 2015	National sustainable development strategy	Current	2009	End term (2015)
Vanuatu	Vanuatu Agriculture Sector Policy 2014 – 2024	National Agriculture sector policy	Awaiting formal approval	2018	2023-24

The differing format and content of the plans is described below.

Sector plans: Four of the agriculture sector plans (Fiji, FSM, Solomon Islands, Vanuatu) are mid-length documents of 20-50 pages (the Fiji and FSM plans have additional annex material). These have the general pattern of an introductory situation description; discussion of sector issues, and presentation of priorities, strategies or actions. In the main they are reasonably succinct and focussed documents.

The other two agriculture sector plans (PNG and Samoa) are much longer – approaching 200 pages – and have more extensive background description and narrative.

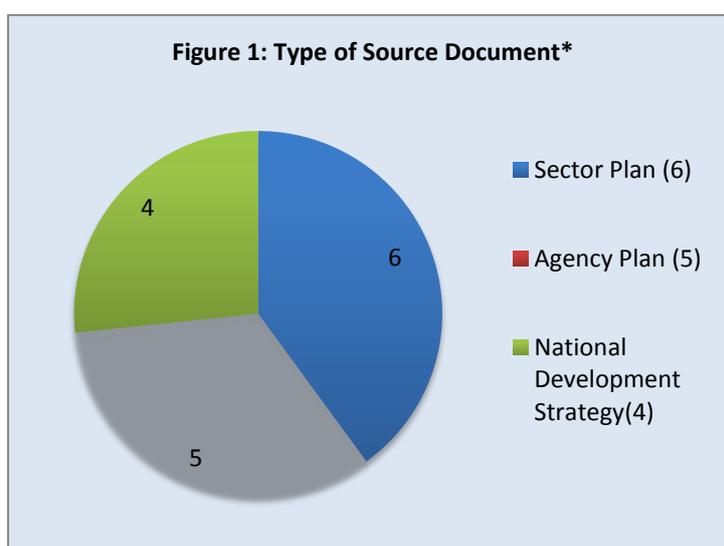
All the agriculture sector plans have multi-year terms, from four to ten years.

Agency plans: Two of the agency plans (Cook Islands and Tonga) are corporate or business plans covering one or two financial years. These are heavily weighted towards agency outputs, including resources and corporate service issues. They have relatively little descriptive material about the sector from an overall or strategic perspective.

Three of the agency plans (Kiribati, the Marshall Islands and Palau) are multi-year plans incorporating the word ‘strategy’ or ‘strategic’ in the title. They have some descriptive material (less for Palau) while also incorporating a matrix style presentation of outputs and activities. In this way they represent a crossover between agency business plans and national sector plans.

National Development Plans: One of the national development plans (Timor-Leste) has separate sections on rural development and agriculture (approximately 30 pages) the content of which is much like a national agriculture sector plan.

The remaining three national development plans (Nauru, Niue and Tuvalu) address agriculture in short general paragraphs and in the content of a matrix of actions. In each case the total agriculture content is limited to 2-3 pages.



*Numeral indicate the number of countries

3. Inventory Analysis

Inventory Matrix

The inventory matrix provides a common reference document for national agriculture plans in the Pacific Islands region. The matrix records country statements across a number of parameters, including sectoral issues and priorities, as well as explanatory notes describing the parameters and structure of the matrix (Annex C).

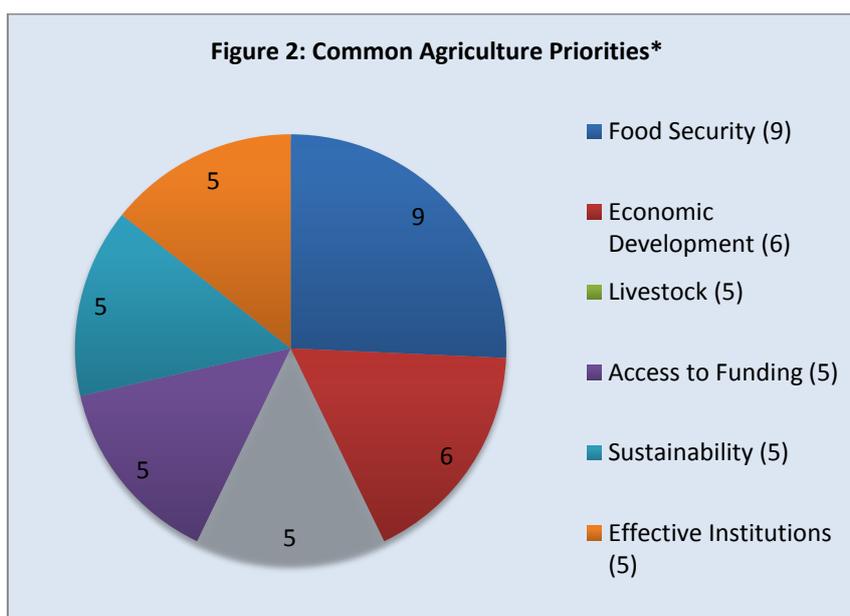
Methodology

The analysis was carried out in three phases:

- 1) An initial regional overview of national agriculture sector priorities to identify common priorities across the region;
- 2) More detailed analysis of the most common priorities noted under 1). This involved a review of the full documents to identify the key subcategories within the broad priority areas.
- 3) Narrative description of the most common sub-categories, focussing on the emphasis or rationale set out by countries.

Overview of Regional Priorities

Table 2 below presents summary information on national agriculture sector priorities. This analysis is based on national Category 1 priorities in the inventory matrix; i.e. first level priorities, however defined, in each of the source documents (Worksheet 3 in Annex C). Although the description and status of the priorities is different for each of the strategies/plans, taken overall they provide a broad indication of priorities across the region. Figure 2 shows the six most common priorities across the region.



* Numeral indicates the number of countries that included the sub-category

Table 2: Pacific Island Countries: agriculture priorities identified in agriculture sector plans/strategies

	Food Security / consumption of local produce	Food safety	Local markets / consumption	Economic development incomes and Livelihoods	Integrated ag. system	Forestry	Livestock	Land access /expand agriculture	Private sector	Access to Funding / Investment	Gender, Youth	Trade	Added value / niche products	Sustainability /NRM	Biosecurity / quarantine	Climate Change	Effective Institutions	Policy / regulatory framework	R&D	Extension / training	Other
Cook Islands							X								X		X	X	X		Projects delivery
Fiji					X					X							X	X			Delivery of services
FSM	X	X		X							X			X							Traditional / customary knowledge
Kiribati							X								X		X				Atoll agriculture
RMI	X	X	X	X	X				X	X		X	X		X			X			Urbanization, Biodiversity, coastal protection, outer islands
Nauru	X						X						X								
Niue	X					X				X		X							X		
Palau			X				X	X							X						Plant/animal health, watershed / farm management, invasive species
PNG				X							X			X			X				Product quality, Social sustainability, allocate resources to priority areas
Samoa	X								X				X	X				X			
Solomon Islands	X	X		X	X					X				X							Poverty alleviation
Timor Leste	X					X	X													X	Irrigation, specific commodities, fisheries
Tonga				X										X							
Tuvalu	X		X					X							X						Subsistence agriculture
Vanuatu	X			X		X		X		X	X	X			X	X			X	X	Planting materials, tools
Number of countries	9	3	3	6	4	3	5	3	2	5	3	3	3	5	4	2	5	4	3	2	

There are clear overlaps between these categories, for example between Food Security and Economic Growth, both of which are based on (increasing) agricultural production. Bearing in mind these overlaps, these common priorities can be considered under four common regional themes:

1. Food Security
2. Economic growth (which includes livestock and access to funding, as identified in Figure 2)
3. Sustainability (natural resources)
4. Effective institutions

Detailed analysis of source documents

A review of the source documents was carried out to identify common factors at a greater level of detail under each of the four common regional themes. This was carried out by reviewing each source document in detail and recording subsidiary factors as sub-categories within the four themes.

Over 190 sub-categories were identified, along with a record of the number of countries which made reference in the source documents to each sub-category². In this way the most common regional subcategories were identified; they are clustered below under each of the four themes:

Regional Themes and Most Frequently-raised Sub-Categories

1 Food Security

- a Nutrition
- b Reducing reliance on imported food (self sufficiency)
- c Traditional knowledge and practices

2 Economic Development

- a Access to funding/credit
- b Local markets
- c Trade
- d Adding Value
- e Crop and livestock improvement
- f Infrastructure: processing and transport
- g private sector role
- h rural livelihoods and capacity to participate
- i land access / tenure

3 Sustainability

- a Soil and water
- b Biosecurity / pests and diseases
- c Climate change
- d Organic agriculture

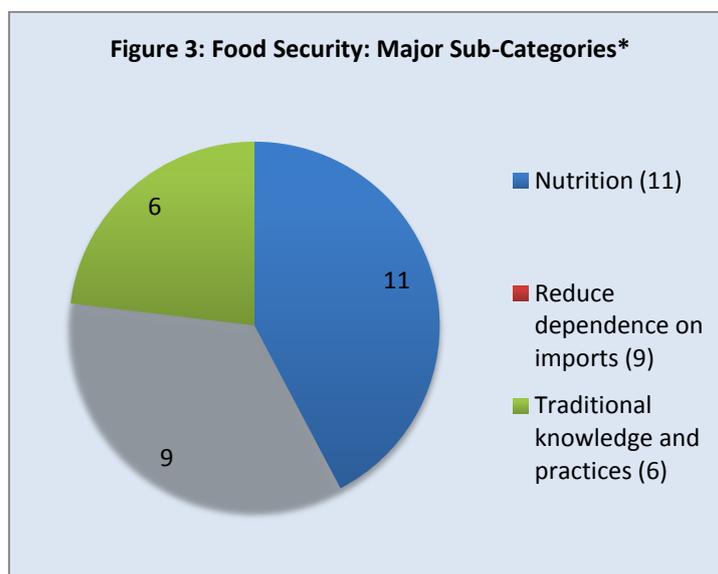
4 Effective institutions

- a Policy / strategy / regulatory framework
- b Delivery of services (extension; training; statistics; R&D)

² The spreadsheet setting out this data is attached as Annex D

Discussion of Common Regional Themes and sub-categories

A. Food Security



* Numeral indicates the number of countries that included the sub-category

a. Nutrition

Eleven countries included reference to the link between food, nutrition and health. Countries were clear that locally produced food, particularly traditional staples, can offer a healthy substitute for certain imported foods. As explained in the Marshall Islands national development strategy³; *“The influx and consumption [of] less nutritious imported food have induced the prevalent health problems or “life-style” diseases such as diabetes, high blood pressure, obesity, and gout among our people. To address these issues, the strategies proposed under agricultural development advocate the increase in the output of local food it is essential that our people have adequate access to quality and nutritious food”*.

b. Reducing reliance on imported food (self sufficiency)

Nine countries highlighted the goal of reducing the reliance, or dependence, on imported foods. There is a dual rationale for this; the first relates to the nutritional impacts of certain imports, the second relates to import substitution. The two issues come together through promoting the goal of self sufficiency for food/nutrition; *“Promote and support increased production, productivity and the resilience of village agriculture to ensure self sufficiency in food and nutrition supplies for the people of Samoa and to raise rural incomes”*⁴.

With respect to nutrition, concern is raised about foods that are “processed, high in sugar and salt and of poor nutrition”⁵, as well as high in fat, with one country citing turkey tails as an imported food product raising health concerns.

³ The RMI national development strategy ‘Vision 2018’ is a linked document in the matrix.

⁴ Samoa

⁵ Cook Islands

In other cases, countries cited the high level of imports/consumption of staples such as rice as a driver for local production; “ a better potential opportunity would be if significant substitution of imported starch products such as rice, noodles, ramen and flour could be achieved by encouraging greater consumption of local staples”⁶. “The Solomon Islands reported rice consumption of 100kg per capita noting that this is “the second highest amongst Pacific Islands”. Timor-Leste has a goal of being self sufficient in rice production by 2020.

Further, Kiribati noted the risks of exposure to changes in the global commodity market - “We are fully aware of the fact that grain-growing countries in Asia and South America are facing great difficulties, and are looking at alternative crops that provide better returns. If this happens the people of Kiribati will starve”.

c. Traditional knowledge and practices

Six countries highlight the role of traditional knowledge and practices, for production and nutritional reasons; “growing traditional food crops will provide us with unlimited and nutritious supplies of fresh foods that will both address our food shortage and health problems”⁷, and in some cases acknowledging with regret the “diminishing traditional knowledge of farming”⁸.

The theme of food security was closely linked with consumption of local produce. Of the nine countries that included food security as a priority, five described the issue in these terms, for example a priority for Tuvalu is to ‘*Increase production and consumption of local produce*’. In this way food security is closely linked with the issue increasing production; sub-categories that address ways of increasing agricultural production are discussed under the Economic Development theme.

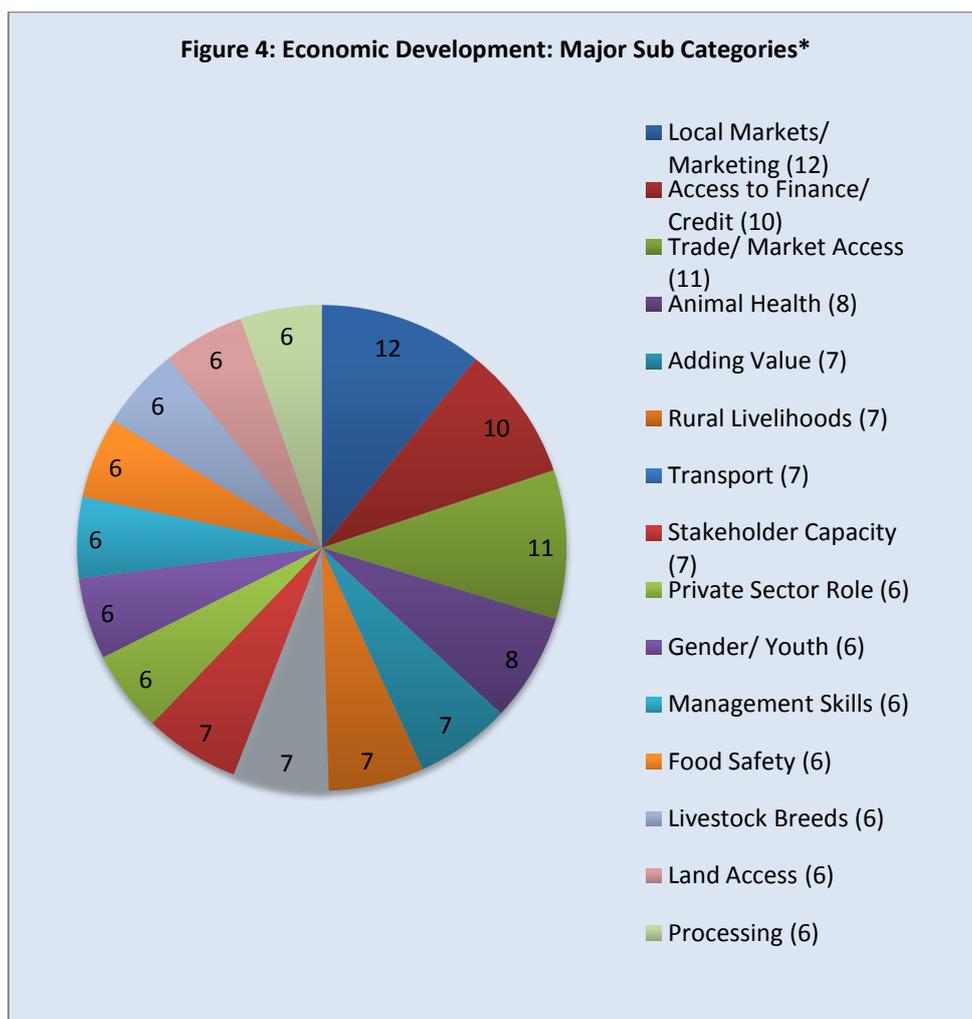
⁶ FSM

⁷ Kiribati

⁸ Tuvalu

B. Economic Development

The issue of economic development / growth dominated much of the content of the source documents and more than half of sub-categories (over 100) were identified under this theme. A relatively large number of common sub-categories were identified, as shown in Figure 4, and discussed further below.



* Numeral indicates the number of countries that included the sub-category

a. Access to finance/credit

There was clear recognition of the need for greater investment in the sector to increase production and the economic contribution of the sector. The most common single category was access to credit/finance (10 countries). Access small scale credit (or grant) facilities was identified as a particular need for small holders, who have difficulty in this area. At the same time, some countries actively promote larger scale ‘industrial’ agriculture, for which significant investment is required.

At the national scale there were a number of general references to the need for investment or a 'well resourced sector' (5 countries). Countries also highlighted the role of donor assistance (5 countries) and foreign investment (4 countries).

b. Local markets

Local markets were identified by twelve countries as a development area. Support was evenly spread between markets (the physical locality, access etc) and the concept of marketing (9 countries and 8 countries respectively). Supporting market linkages was recognised as a 'public good'⁹ and therefore an appropriate area for government involvement. In Nauru, "So as to provide an opportunity for individuals to sell their wares, in May 2009 Nauru's weekly central market was established and has had between 25 and 42 vendors per week".

RMI addressed both markets and marketing, through a 'special program to establish a physical market place'¹⁰ (see below), and through a marketing campaign; "*Be Marshallese....Buy Marshallese*" - a concept also adopted in several other countries.

RMI Special Program: "Farmers Markets" on Majuro and Ebeye

A "farmers' market" is a place where local people can come together and sell their local produce- fruit and vegetables, and also fresh fish and locally processed foods such as preserved Pandanus, roasted breadfruit and fish jerky. It can also be a place to sell handicrafts or clothes. For the consumers in the local community, the market will be a place to buy local, fresh and healthy foods, and would serve as a gathering and meeting place.

Creating such markets will help achieve several development objectives for the Marshall Islands, including import replacement, healthier diets, increased self-reliance and income generating opportunities for the community.

Farm inputs (feed, seed, fertilizer, tools etc) were raised by six countries, including the concept of support for a market for farm inputs, in terms of both a market place and more affordable pricing: "Since marketing systems for inputs [are] almost non-existent, the government needs to provide market information and monitor market performance. Timely availability of agricultural inputs is a major problem in remote areas and islands. In many cases the farm input supplies are not readily available and if available it is very expensive hence unaffordable."¹¹

c. Trade

Reflecting an interest in developing export products and businesses, 11 countries highlighted trade issues, focussing on trade policy and facilitation/support for access to offshore markets.

Four countries noted an interest in international marketing campaigns for local produce, and two further countries referred to the concept of a 'unique national brand' as a marketing tool.

⁹ FSM

¹⁰ The establishment of this market followed an earlier effort in which the building/market was established and operational, but subsequently appropriated for other uses.

¹¹ Solomon Islands

Discussion on commodities (see below) illustrated a regional interest in identifying and producing high value niche products for export; nine countries identified niche products such as spices (vanilla, pepper, nuts etc) as areas for development.

Six countries also identified food safety as a key area, particularly compliance with international requirements for market access (including codex/HACCP¹²). This was also an issue in relation to domestic produce and consumption, *“From a food safety policy perspective, there are currently different levels of protection for the domestic market and the export market....consideration should be given to ensuring equal protection for both domestically consumed food and food for export”*¹³

d. Adding Value

Seven countries identified value-added products as a means of increasing revenue, primarily through exports. In most cases it was raised as generalised aspiration; “The stakeholders in the horticultural industries in Fiji need assistance in improving their ability to add value to their products and business practices to improve profitability”, or focussed more on producing high value commodities (such as vanilla) rather than adding value *per se*. FSM provided examples of unique processed foods being exported for purchase by Micronesian communities living outside the country: “Another example of opportunistic exports is exports of cooked food, which now brings in more money than copra. Chuukese pounded breadfruit (kkon) and Pohnpeian banana pudding (pihlohlo), among other island foods, are being distributed and marketed to the growing FSM emigrant population overseas.”

The requirement to meet quality standards was cited by seven countries, particularly in terms of meeting food safety standards required for market entry.

e. Livestock and crop improvement

Identifying improved breeds was raised by six countries as a means of increasing production from livestock. The overall health and condition of livestock was also seen as a key issue; eight countries the noting the importance of animal health or veterinary services (one country proposed free vaccinations for farm animals).

Crop diversity and genetics - along with identifying new crops varieties - was similarly important, being raised by five countries.

f. Infrastructure: processing and transport

Infrastructure was seen as a key element of an integrated system of production. A series of infrastructure areas were identified, the most common of which were transport (seven countries) and processing facilities (six countries). Others included energy, communications and markets.

Poor transport linkages were identified as a constraint on development; the need for improved roading and ports (along with outer island connections) were raised as specific areas.

g. private sector role

There was support for the private sector taking a lead role in the sector (6 countries) and recognition of the need to create a supportive enabling environment to achieve this (3 countries).

¹² Hazard Analysis and Critical Control Points (HACCP)

¹³ Solomon Islands

The private sector was recognised as encompassing large, potentially industrial scale, businesses and small scale subsistence and cash-crop farmers. There was specific mention by three countries of the need to encourage and train potential entrepreneurs. There was also reference to public–private partnerships and other business agreements between the private sector and the government.

Support for the private sector taking a lead role was based in part on previous experience of government interventions that had been unsuccessful, or worked against successful private initiatives:

“Pohnpei pepper, used to be an important export product some years ago, but the production capacity is now low. It is reported that a very successful high-end pepper product failed, when the government intervened on behalf of disgruntled pepper growers who wanted processors to buy all of their harvest, instead of only the best pepper. The other problem is that a government-financed and operated pepper processing plant competed with the private sector pepper manufacturer, leading to the collapse of that industry. It is alleged that poor government decisions and the emergence of a strong sakau (kava) market contributed to the demise of the pepper exports.”

There was some recognition of the dual pressures for government to *do something*, while at the same time keeping out of ‘the market’ itself: “possible use of targeted subsidies to address market failures may need to be considered. When subsidies are considered these will be ‘market smart’ with the aim not to distort markets for private sector activity”¹⁴.

At the same time, for some, a key element of the business environment is the use of incentives provided by government to support agricultural businesses/production. Samoa included a list of possible incentives that could be employed, including tax exemptions, reduced interest lending, price and import subsidies, guarantee and insurance schemes.

h. Capacity to participate / rural livelihoods

Concerns were identified by seven countries about the importance of stakeholder participation and the capacity of farmers (e.g. farmers associations and small holders) to participate in agriculture development and see improvements in rural livelihoods (raised as a separate issue by seven countries).

Some countries/agencies undertook to make specific efforts in response for example; work with farmers associations on agricultural initiatives, or establish rural resource centres¹⁵. This aspect is closely related to the focus on extension services and training discussed below (under Effective Institutions).

¹⁴ FSM

¹⁵ Nauru

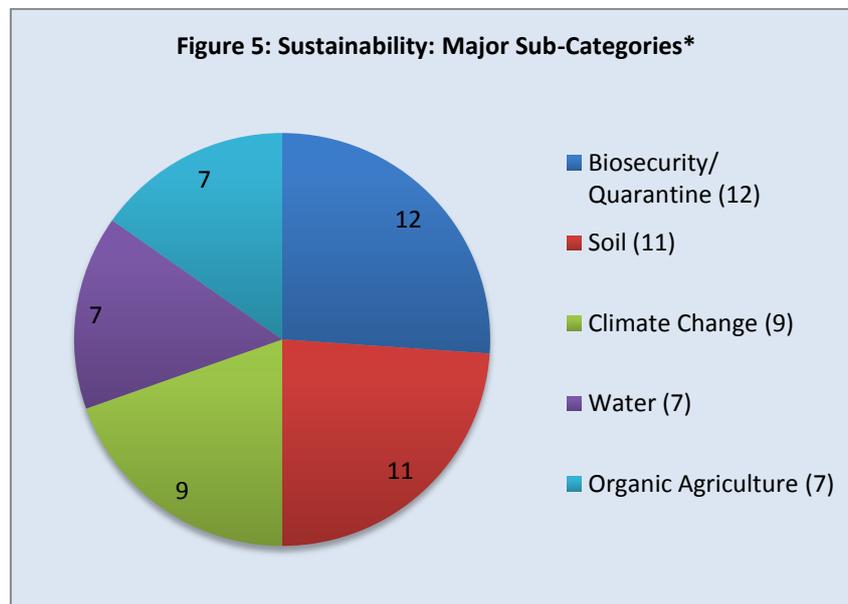
i. Land access / tenure

Six countries identified difficulties in gaining access to land for farming as a constraint. This largely relates to traditional/customary land ownership structures and tenure arrangements. Several countries highlighted the fact that most land is in private (customary) ownership and commented on the potential benefits that may be gained from increasing its utilisation in agricultural production.

Solomons Islands: “Landowners are empowered through national legislation, to act as decision-makers for natural resources and environmental management practices on their land. It is therefore presumed to be the resource-owners’ responsibility to manage natural resources wisely for benefit of present and future generations. The Constitution recognizes the defector rights vested by customary law of ownership.”

Samoa: “Increasing agricultural production and productivity will also largely depend on the greater economic use of customary land either by the landowners themselves or by others through leasing. In that regard, Government has taken steps to explore how to achieve greater economic utilisation of customary land through leasing arrangements. This initiative aims to clearly define and improve the terms and conditions for leasing of customary land”.

C. Sustainability and resilience



* Numeral indicates the number of countries that included the sub-category

a Soil and water

Soil and water, as basic requirements for agriculture, featured as the sub-categories raised most commonly; water by seven countries and soil by eleven countries.

For water, concerns covered water availability, watershed management, irrigation and drainage. The particularly challenges faced by atoll countries were also highlighted: “On the atolls both the limited quantity of water available and the quality of the water are limiting”¹⁶.

At the same time there was awareness of potential adverse effects on water quality due to agricultural activity with countries identifying the need to manage these so that “community and ecosystem health is not adversely affected”¹⁷. There was recognition of “increasing livestock numbers imposing pressure on ecosystems and watershed systems.”¹⁸

There was strong regional interest in soils, focused on preserving or improving soil quality (which in several instances is identified as a constraint for agriculture production – particularly for atolls) and managing erosion. The role of composting was mentioned as an option for improving soils.

b Biosecurity

A total of nine countries identified a range of issues broadly associated with border control (biosecurity and quarantine - areas where agriculture agencies commonly have statutory roles and functions). Five countries noted the associated risks of introduced pests and diseases.

¹⁶ Kiribati

¹⁷ Cook Islands

¹⁸ Samoa

There was also interest in monitoring, surveillance and control of pests, to maintain agricultural production and, to some extent, for biodiversity protection (five countries) with some specific initiatives proposed for pest eradication.

c. Climate Change

The general issue of climate change was raised by nine countries; addressing a range of concerns including climate variability – temperature and rainfall; extreme events/disasters and sea level rise.

Water availability and soil loss were linked with climate change, in relation to the risks of future changes in precipitation. The importance of adaptation measures was recognised in the form of the need to “Identify impacts of climate change on crops production and develop mitigating strategies”, and promote “diversification into new crops that are resistant to climate change impacts on soil and water conditions”¹⁹.

Climate change was also identified with potential risks in other areas: “Changing climatic conditions and natural hazards have implications for the transportation of agricultural produce from rural areas to markets in the main urban centres (e.g. poor road conditions, deteriorating wharfs and jetties and inconsistent shipping routes).” “Prolonged (and or shortened) wet seasons produce conditions favourable for pests and diseases harmful to plant production and crop harvesting.”²⁰

d. Organic agriculture

There was significant interest in organic agriculture (seven countries). There was also a general sense that Pacific Island countries are well placed to develop organic products: “Most crops grown in PNG use only the rich fertile soil without any fertilizer. No insecticide sprays are used; hence there are no serious problems of pesticide residues. PNG can capitalize on the world demand for organic products”.

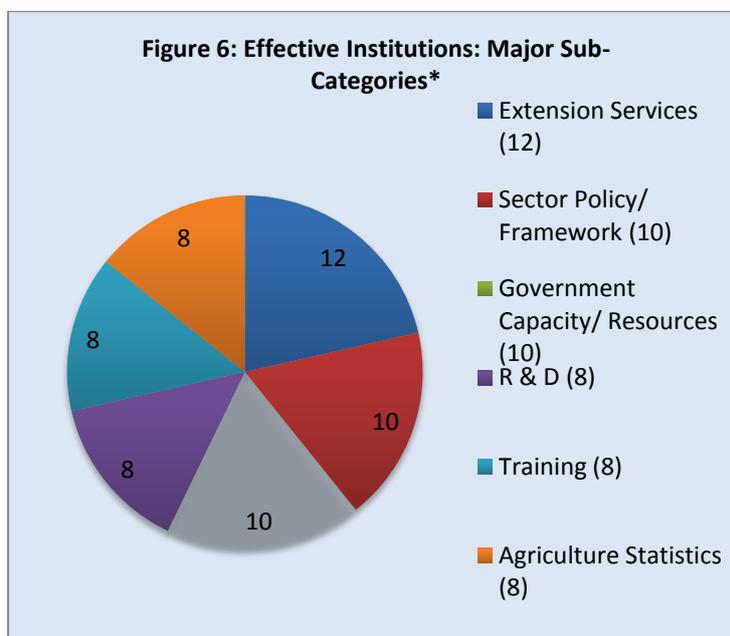
There was also acknowledgement of the need to document this through certification (three countries): “The potential for organic labeling of PNG coffee, cocoa, etc needs to be studied and emphasized in marketing programs to maximize the value of PNG products.”

¹⁹ Samoa

²⁰ Vanuatu

D. Effective Institutions

The source documents identify a large number of issues regarding the way the government provides the policy and regulatory framework for agriculture, and about the government's delivery of services to the sector.



* Numeral indicates the number of countries that included the sub-category

a Policy / strategy / regulatory framework

Eleven countries discussed a suite of issues around the role of government in developing a strategic approach to provide a framework for development of the agriculture sector. The issues ranged from development of sector policies (ten countries) or strategies (four countries) and the regulatory framework (six countries), as well as industry or commodity plans (five countries). There was widespread concern about the capacity and resources available to government agencies to carry out their work (ten countries). In some case countries identified collaboration between agencies as an area for improvement.

b Delivery of services (extension; training; statistics; R&D)

There was a consistent level of support for government supply of certain services, particularly extension services, training and research, and the provision of sector data/statistics.

The documents noted the need for effective delivery of services and identified some shortcomings in this area (including comment on ineffective or inefficient government, and concern about bureaucratic 'red tape'). In some instances there were frank self-assessments "in the years since [1995], service delivery has deteriorated. On the whole, service delivery systems are dysfunctional and there remains widespread confusion over functional (who does what) and financial (who pays for what) responsibilities across the three levels of government. Institutional capacity to deliver services is generally poor"²¹.

²¹ PNG

Vanuatu observed “Poor participation of government stakeholders: poor collaboration and coordination among relevant government stakeholders (on service provision, local infrastructure, domestic market opportunities like tourism)”

Extension (12 countries), **Training** (eight countries) and **R&D** (8 countries) were seen as related areas as illustrated by Timor Leste; “The adoption of new farming techniques, equipment and research is critical to the future of the agriculture sector. We will conduct a review of our agricultural knowledge system to improve the skill level of agriculture extension workers. This will involve developing quality courses for pre-service training at agricultural secondary schools, colleges and universities. A career development program for in-service training will also be developed.”

FSM described that “The effectiveness of extension services generally has declined over the last two decades due to use of inappropriate methods, inadequate operational budgets and limited human resources.”

Statistics: eight countries recorded government activities in the area of agricultural data and statistics. Samoa commented on the overall situation in that country:

“The availability and quality of agricultural statistics has declined over the years and is one of the key challenges now facing the sector. Decisions about aid and/or investment efforts to foster agricultural growth need to be based on sound information.....These decisions need to be made under a broader framework that takes into account the different variables that affect the environment and influence global warming and the overall production systems. The overall impact of these factors can only be effectively measured and evaluated with appropriate statistics.”

Fiji noted an existing capacity in this area “The agriculture statistics service is strengthened for purposes of gathering, organising, analyzing, and reporting agricultural data”.

In other cases countries identified particular data needs and gaps: “urban market demand for agricultural product may exist in urban areas, suppliers from rural areas may not be aware of them and similar situation holds for international markets. Hence there is a need to disseminate market-related information to both producer and buyer”.²² Palau undertook to “maintain and provide statistics on agricultural production, farm size and numbers, and agricultural commodities in all market outlets.”

²² Solomon Islands

Other Issues

Commodities

All countries included some discussion of commodities produced. In all, over 50 different plant and livestock varieties were cited, along with several general categories such as ‘root crops’ or ‘spices’. A list of commodities appearing in the source documents is attached as Annex E. The list is dominated by food crops; because of the different treatment of livestock and forestry in the documents (i.e. some countries have separate livestock or forestry plans), these sub-sectors are less represented.

In most cases the documents include lists of commodities, or cite them as examples in the text. The commodity most commonly included is coconut, included by 13 countries. The situation for coconut is illustrated by this observation from the Solomon Islands: “Coconut not only provides cash income but also make an important contribution to the people’s daily diet. Despite its importance, coconut has been neglected, that is there has not been any proper replanting for more than 20 years, and thus a high percentage of palms are old and in the declining phase of production”.

There are some conspicuous gaps, suggesting that the source documents do not provide a complete picture of the most commonly grown crops. For example bananas and breadfruit are mentioned in only about half of the documents, despite being ubiquitous around the region. Despite that, some general observations can be drawn from the list of commodities:

- The range of commodities listed is consistent with the emphasis on the key areas of food security, and increasing agricultural production that are described above;
- There is widespread utilisation of traditional crops, at some level of production;
- The range of novel and ‘niche’ products highlights the message that countries are seeking high value products that can supply the export market

Five of the documents include separate, substantive discussion on management of specific commodities; Fiji, FSM, PNG, the Solomon Islands and Timor-Leste.

Table 3 below lists the commodities featured for each of these five countries, along with information on the main commodities produced and exported from these countries. Note that the table only includes information that was presented in the source documents, and excludes non-specific categories such as ‘organic and fair trade’.

Country	Commodity featured	Major production	Major Exports
Fiji	Sugar, coconut, pineapple, root crops, beef/dairy, swine, poultry, kava.	<i>Information not included</i>	Sugar, dalo, cassava, kava, copra, coconut oil, papaya
FSM	Coconut	<i>Information not included</i>	Betelnut (14% share of ‘major exports’); kava (3%); Others: copra, banana, citrus, root crop,
PNG	Grains, oil palm, coffee, cocoa, coconut, rubber, tea, apiculture	Sweet potato (64% by weight), banana (10%), cassava (6%), yam species (6%), true taro (5%), Chinese taro (5%), Coconut (2%)	2005 figures: Palm oil (295 x000 mt); coffee (72), copra oil (54), Cocoa (44), copra (22), tea (7).
Solomon Islands	Coconut, oil palm, vanilla, coffee, cocoa, rice.	<i>Information not included</i>	<i>Information not included</i>
Timor Leste	Rice, maize, coffee, candlenut, coconut, bamboo.	2010 figures: maize (72 x000 mt), rice (37),	<i>Information not included</i>

Tourism Links

Five countries identified links between agriculture and tourism, with respect to using local produce in tourist accommodation; both local crops and develop new products to suit international tastes. The Cook Islands noted that “The growth in Tourism, together with increased employment opportunities in a cash economy slightly shifted the focus away from export to the local market created by the increase tourist numbers visiting Rarotonga and the Pa Enea. This has also created Agricultural produce import opportunities for Hotels and Supermarkets due to sub-standard quality of local produce, inconsistency and insufficient local supplies, hence the increase in imports of foreign produce.” Samoa too noted that “despite collaborative efforts between the agriculture and tourism sectors in promoting the use of local produce by the local hotels and restaurants industry, data shows the imports of fruits, vegetables and spices have almost doubled in the past 7 years”.

More optimistically FSM identified several strategies ‘to increase linkages and synergies between the agriculture and tourism sectors’ including ‘strategically re-orient the production operations of small-scale farmers to meet needs of hotel/restaurant sector’ and ‘explore opportunities for agriculture tours and farm-stays’.

Gender

Six countries raised the issue of gender roles as well as the participation of youth and ‘vulnerable groups’ in the agriculture sector. In some cases, very specific proposals were included, such as ‘ensure gender balance in recruitment of training staff and enrolment of students on training courses’²³, or ‘increase the participation of women in farming’²⁴. In other cases (in lengthier documents) there were broader observations of the role women in society and the agriculture sector, for example the text below from PNG:

“As in many Melanesian societies, men dominate decision-making at the household and at community levels. The participation of women and girls in decision-making is more difficult when they lack education and have limited or no income. Empowerment of women has been advocated by many NGOs and community-based organizations (CBOs) yet women have still a long way to achieve the same status as men in many communities.”

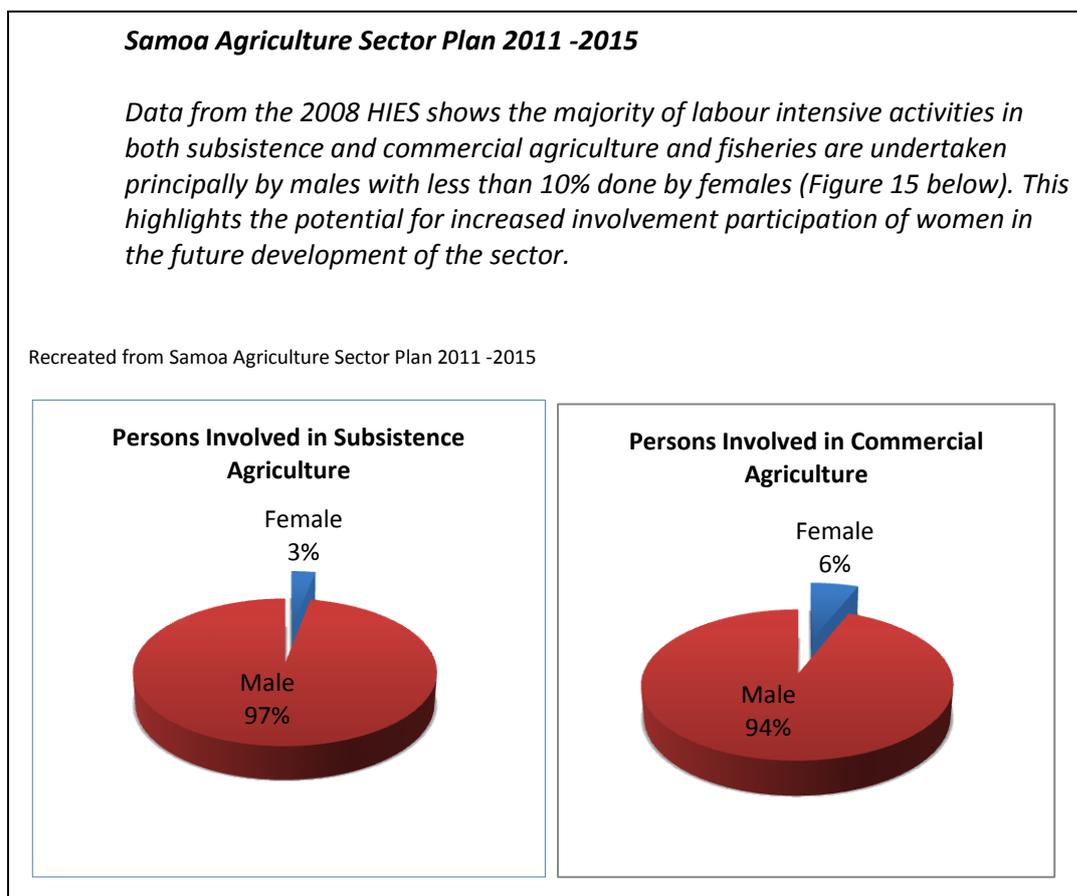
“Women contribute 50-70 percent of agricultural labor, more particularly in activities such as clearing, planting, weeding, harvesting, transporting, storing and marketing. Cash income received by women from the sale of agricultural produce gets effectively spent for improving family living, nutrition, health and education. Agriculture provides employment and income to 70% of women. Rural women in PNG are disadvantaged in almost all aspects of rural life, due to limited access to and control over productive resources (lands, water, labor, inputs and technology), services (extension, training, and credit), and markets, and their limited participation in decision-making. Women receive lower wages for agricultural labor; earn less than men from the sale of cash crops, are unequally represented in the social forums, and are left out both as contributors and beneficiaries in productive economic activities. When households need to generate additional income or faced with economic crisis, women must mobilize their energies. It is important to formulate clear policy and appropriate strategies towards welfare of women in all aspects of agricultural development.”

²³ FSM

²⁴ RMI

Use of Evidence

Of the six national agriculture sector plans, four include data or information as evidence to inform policy in a more or less systematic way. The PNG and Samoa documents, being of considerable length, include the most detail. The most common data included in plans focuses on economic and trade (imports and exports) indicators. Other issues are also covered. The example below illustrates how data, in this case from Household Income and Expenditure Survey, is presented.



Other national sector plans cite data for selected purposes to illustrate a specific point in the text. The Timor-Leste national strategic development plan (the parts relating to agriculture) also provides systematic use of data to inform policy and strategy.

Evidence is also cited from stakeholder consultations: “A common concern raised throughout the stakeholder consultations was the lack of information thus constraining potential suppliers from entering both domestic and international market.”²⁵

²⁵ Solomon Islands

Forestry

Many issues relevant to forestry (such as infrastructure or climate change) were shared with the sector more broadly. In addition, nine countries identified a total of 17 issues relating to forestry. These included:

- The mixed role of agroforestry – i.e. incorporating food crops (5 countries);
- Loss of forests and traditional agroforestry systems (4 countries)
- Potential for medicines, handcrafts and ecotourism (4 countries)
- The concept of protected areas (3 countries)
- Effects of social changes: population growth and urbanisation (3 countries)
- The potential for carbon trading (1 country)

Alignment with National development priorities

All the national agriculture sector plans made explicit reference to their respective national development plans / strategies, as did three of the four agency plans.

Legislative basis

Four countries included information about the legislative framework governing the agriculture sector. The information is not exhaustive, but is included as Annex F to illustrate the range of legislative requirements.

Process for developing plans

Five countries provided explanations of how their sector plans were developed. A brief summary of the process for these five countries (Fiji, PNG, Samoa, Solomon Islands and Vanuatu) is attached as Annex G.

Other linkages

There were additional cross linkages between nutrition and the *Health* sector, as discussed under Food Security. Further connections were mentioned with *Education*, with respect to vocational training and inclusion of agriculture in school curricula, and *Fisheries*, which shares issues relating to land use and water.

Analysis – sector plans only

As a check on the whether the type of source document influenced the analysis, a comparative review was carried out using only the seven national agriculture sector plans (i.e. excluding the national development strategies and the agency plans).

For the second stage analysis the most common categories remained broadly the same. Several categories could be said to gain prominence under this approach, in that a greater proportion of the countries identified the categories: Sector policy formulation; government capacity; extension services; statistics; access to credit; local marketing; gender; climate change.

4. Conclusion

The inventory provides a broad scale review of agriculture and forestry issues across the Pacific Islands Region. The analysis shows the emphasis across the region on some key issues for the sector (economic development, food security, markets/trade, climate change), and some specific areas of focus or demand (access to credit, nutrition/health, climate change etc).

The issues identified in the inventory matrix and analysis show strong alignment with elements of the PAPP Project. In particular:

Result 2.1 *Improve the dissemination of field research, good practices and technical exchange including climate change adapted research technologies*

The inventory shows strong interest across the region in both agricultural research, and the need for the sector to employ adaptation measures in the face of climate change.

Result 2.2 *Improve the food security of small-holder agriculture by facilitating the adoption of locally produced animal feeds and improved land management techniques households (sic), in cooperation with national extension services and communities*

Food security is confirmed as an issue of very strong regional interest, as is the role of extension services for farming communities.

Result 3.1 *Improve the capacity of small-holder farmers to link to markets through Farmer Associations*

There is strong interest in linking farmers to markets (domestic and international). The analysis shows that Farmers Associations are just one of several means to achieve this. It is also clear that some countries are looking to develop more mechanised, large scale farming practices, which may have implications for small holders and land use in some instances.

Potential Next steps

The alignment of key themes and sub-categories in the inventory with the PAPP objectives suggests some key areas that could benefit from project support.

Sector plans/strategies: The analysis highlights the role of sector plans and the benefits of a coordinated approach from government to support the sector. Table 1 (and Figure 1) shows that little more than a third of countries currently have a national agriculture sector plan or strategy.

Two countries (Cook Islands and Tonga) have the development of such a strategy on their program of work for the coming year. One of the agency plans is beyond its nominal term (RMI). Two of the four national development strategies also appear to be scheduled for review.

Further, three of the national sector strategies are beyond their nominal term (Solomon Islands) or coming to the end of their term (Samoa and PNG). One of these (Samoa) has signalled that a review is scheduled for 2015.

In addition, there are a number of sub-sector strategies (e.g. forestry, livestock) proposed or in preparation.

This points to a situation where there is an ongoing renewal / revision of plans across the region, for which the Project may provide assistance. Taken overall, the documents in the current inventory offer different approaches and examples of use of data, consultative development processes, succinct distillation of priorities, and ambition for the sector.

The development of sectors plans offers the opportunity to make a case for government resources to be invested in the sector to address the shortfalls in capacity evident across the region (mainstreaming). Similarly, they provide a vehicle to guide donors/development partners in terms of allocation of development resources (donor-streaming).

Support for markets: It is clear that the connection between production and markets is important for the aspirations of countries to move towards self-sufficiency. Countries have identified information gaps (knowledge of market needs and pricing) and infrastructure requirements to support expansion of local markets. The issue of *marketing* brings together the production and sale of local produce with the critical issue of nutrition and non-communicable diseases. The Project may be well placed to assist with information and data systems, as well as working with the health sector to develop joint local and perhaps regional programs linking local food production with positive health/nutrition messages.

Agriculture statistics: Sound agriculture data can be used to underpin the development of strategies and policies, as well as practical campaigns associated with markets and marketing. The use, or lack of, such data has been highlighted in the inventory and stands out as a potential area for Project support.

Trade: The interest in niche products and markets could be supported by some generic work on the global market for 'niche' products such as vanilla, so that producers are fully aware of the opportunities and potential risks (e.g. in terms of quality and pricing).

Organic products are seen as a way ahead for many countries. Again, regional support could be delivered through providing market information, and support for certification / branding. There may be opportunities for regional information sharing in partnership with existing sector organisations, and South-South learning.

There may also be scope to support regional approaches to specific agriculture trade issues (e.g. food safety/quality issues)

Delivery of government support: The inventory provides examples of government intervention both supporting, and working against, private sector development. The Project could develop case studies on this and develop regional guidance on delivering support in a way which allows for the private sector to develop and thrive.

Inventory matrix: If the matrix is to be made available publicly there is a need to gain country agreement as some documents are in draft form or may not be intended for public circulation.

To remain relevant the matrix needs to be maintained and updated as new plans, policies and strategies are expire and are revised. The results of the current analysis are drawn from the matrix in its current state and would need to be revisited as the plans and strategies change.

Inventory of Key National-level Agricultural/Forestry policies

Annexes

Annex A: Terms of Reference

A. Consultancy title

Pacific Agriculture and Forestry Policy Inventory (DeskStudy)

B. Background

The Secretariat of the Pacific Community (SPC) and the European Union is working together through a new technical assistance program - the 'Pacific Agriculture Policy Program' (PAPP) (EUR8.6m 2013-17) to deliver the following results:

Result 1: Strengthen regional agricultural development strategy.

Result 2: Improve the dissemination and adoption of applied agricultural production research technologies.

Result 3: Contribute to agricultural enterprise development through improved market linkages.

This project is aimed at producing an Inventory of key national-level agricultural/forestry policies in up to 15 Pacific countries. The Inventory will contribute to a series of activities planned over the next 2.5 years to achieve Results 1. This includes providing an ongoing resource for agricultural policy makers, investors and farmers in the region, the promotion of a Pacific agriculture policy forum on issues and priorities facing their countries and identifying support for improving agricultural policy development processes across the countries.

Policies can cover a broad spectrum area such as : A. National agriculture sector policies/agendas/strategies (e.g Fiji 2020 Agriculture Sector Policy Agenda) _ B. National sub-sector strategies/plans (Tonga sandalwood policy, Fiji sugar sector plan 2012-17 2017; C. Fiscal/Industry/Regulatory Policy, Legislation and Acts (eg. Samoan Agriculture and Fisheries Act); D. Regional Policy Frameworks (eg SPC Youth in Agriculture Policy) E. Policy Resources

The work focusses primarily compiling an Inventory for (A). The inventory will be made available to all member countries through a portal or website hosted by SPC. The work will also undertake an analysis of these documents as outlined in this TOR. The review and analysis undertaken through this work will be used as a starting point to facilitate discussion and dialogue between agriculture policy planners on issues and priorities facing their countries. The policy inventory is expected to also provide the following benefits;

- Easier access to national policies for agriculture across the region by investors, financial institutions and development partners,
- A structured piece for identifying common regional priorities and shaping regional approaches or solutions
- Promote visibility and easy access within industries and line Ministries ;
- Provides a dialogue piece for identifying gaps and opportunities

The Consultant will work very closely with the Team Leader, PAPP in planning this exercise and delivering on this work. Essentially, the Consultant will bring expertise and experience with policy development and analysis, strong writing and communication skills and delivering projects on a timely basis. There is urgency in hiring a Consultant at this stage due to the delay in the commencement of the PAPP and the need to accelerate preparatory work. It is expected that a fulltime Policy Research Officer will be recruited in 2015 to support ongoing work from this initial stocktake. A current PAPP officer will be assigned to assist the Consultant in completing this deskstudy.

C. Scope of work

Major activities to be undertaken by the Consultant are:

a) Conduct Desktop Review and supporting analysis; b) Design or develop a matrix that captures a listing of national agriculture forestry policies and summarises the assessments of key priorities and issues. The format of this matrix should be easily transferrable a website/information portal. c) Prepare Summary Report containing matrix and analyses containing key findings.

(a) Desktop Review

The consultancy will undertake a desktop study of current national agricultural (and forestry) plans and frameworks across the 15 PAPP countries, drawing on the initial listing of plans and frameworks compiled by PAPP. Note that for PNG, PAPP is seeking to engage the National Agriculture Research Institute of PNG (NARI) to complete the inventory for PNG - although this is subject to agreement by both parties. SPC also has a presence in Northern Pacific and will assist with populating the inventory. Given the large number of countries, the Consultancy should aim to compile and analyse at least 4 countries by 30 December 2014.

This desktop review will focus on the plans and frameworks that identify or describe national agricultural sector priorities. Plans, policies or programs that focus on single commodities or specific issues are not the focus of this review. PAPP will provide the consultant with copies of the national agricultural (and forestry) plans and frameworks that they have identified and assist with obtaining additional documents.

The 15 PAPP countries include: Cook Islands, Fiji, Kiribati, Marshall Islands, Federated States of Micronesia, Nauru, Niue, Palau, Papua New Guinea, Samoa, Solomon Islands, Tonga, Tuvalu, Vanuatu and East Timor

The desktop study will provide a summary of the national plans & frameworks, paying specific attention to:

- Status of the plan (e.g. in development, current);
- High priority areas (including commodities and issues) and specific linkages of these priorities, if any to national development plans;
- Identification of common priorities across existing policies;
- Challenges and opportunities for agricultural industries;
- Policies or programs adopted under the plans and frameworks;
- The types of evidence used to develop the plans and frameworks;
- If available, key technical competencies that currently exist within the Ministry of Agriculture
- Processes used to develop the plans and frameworks;
- and
- Plans and responsibilities for implementation.

The findings from the desktop study should be clearly summarised in tables and accompanied by a short explanatory document that discusses the findings. The Consultant may also formulate a small set of questions to assist with the above information and work with PAPP to obtain this information from countries.

(b) Analysis The desktop study needs to be accompanied by an analysis of gaps in knowledge that would help to improve the understanding of how strategic agricultural issues are identified, researched and addressed by policy makers in PAPP countries. The analysis should also include the identification of shared priorities, opportunities and challenges. Areas for further discussion with PAPP countries to be addressed through future consultation, either directly through interviews or through discussion forums, should be highlighted.

Knowledge gaps to be identified in the analysis include areas where the desktop study was unable to find information. The analysis should also include some discussion on the common priorities, challenges and opportunities which could be explored further through PAPP. A clear summary key findings and areas for further discussion should also be presented.

(c) Matrix The matrix should provide the policy listing by country, year, status and elements drawn from the narrative for quick referencing by readers.

D. Outputs • Completed Report including a matrix and narrative that covers the agreed scope of work and meets SPC reporting guidelines • Presentation of the Inventory and key findings at a PAPP organized regional meeting (details to be confirmed)

Annex B: Questionnaire

Sheet number:

Pacific Agriculture Policy Program (PAPP)**Inventory of national Agriculture/Forestry Policies: National Questionnaire**

This form can be filled out either in electronic or paper copy; please feel free to expand the text boxes or use additional pages if you wish.

Country / contact information

Country:	
Contact Person:	
Job Title:	
Agency:	
Email address:	
Telephone:	

National policy/strategy/agenda

Please identify the **most important national level policy/strategy that applies for agriculture/forestry** (if there is more than one, e.g. one for agriculture, one for forestry, then one please use a separate sheet for each)

Full Title of policy/strategy	
What are the key <u>issues</u> identified? (please list)	•
What are the key <u>commodities</u> identified? (please list)	•
Are there any specific directions in the current policy that <u>link farmer's to markets?</u> (please list)	
How is <u>evidence or data</u> used to support directions set out in the strategy? (if possible please give 2 examples)	
What agency is responsible for implementing the policy/strategy?	
Does the strategy have a fixed term? (e.g. 2012-17; or ongoing)	
When is it scheduled for review?	
Any other comments	

Annex C: Inventory Matrix

Screenshots are provided below of each worksheet in the Inventory Matrix to show layout and content (Original is a separate Excel Spreadsheet).

Annex C PAPP Inventory Matrix Final 30 April 2015 - Microsoft Excel non-commercial use

	A	B	C	D	E	F
1	1. National Agriculture Strategies: Summary	Key national agriculture/forestry strategy	Government Agency responsible for Policy	Government Agency Responsible for Implementation	Status	Lead support partner (for policy/strategy development)
2	Cook Islands	Ministry of Agriculture Business Plan 2014/15 <i>Matairangi Pura</i>	Ministry of Agriculture	Ministry of Agriculture	2014 Questionnaire indicates that a 'Strategic Sector or Master Plan' is non-existing.	
3	Fiji	Fiji 2020 Agriculture Sector Policy Agenda "Modernizing Agriculture"	Ministry of Agriculture	Ministry of Agriculture, Ministry of Fisheries and Forest and Ministry of Rural and Maritime Development and National Disaster Management.	Adopted 2014; entering implementation phase. Policy review scheduled for 2020	FAO
4	FSM	Federated States of Micronesia Agriculture Policy 2012 - 2016	Department of Resources and Development		Adopted 2012 - scheduled for review/evaluation after three years and the policy revised.	
5	Kiribati	Agriculture Strategic Plan 2013 - 2016	Agriculture and Livestock Division; Ministry of Environment, Lands and Agriculture Development	Agriculture and Livestock Division; Ministry of Environment, Lands and Agriculture Development	Adopted 2012: Possible independent review mid and end of plan period	SPC [?]
	Marshall Islands	Agriculture: Ministry of Resources and Development Strategy and Action Plan 2005 - 2010	Ministry of Resources and Development (MRD)	Ministry of Resources and Development (MRD)	On the face of it the term of the MRD plan has concluded but this and the State-wide Assessment and Resource Strategy are cited in the RMI report to the 2014 SIDS conference as being "the	

1. Nat. Ag. Strat. Summary | 2. Vision Challenges Issues | 3. Priorities | 4. Commodities | 5. Other nat. policies | 6. Country information | 7

Ready | 100% | 4:51 p.m. 2/05/2015

Annex C PAPP Inventory Matrix Final 30 April 2015 - Microsoft Excel non-commercial use

	A	E	F	G	H	I	J	K	L	M
1	2. Vision; Challenges: Issues			Challenges / Issues						
14	Tonga			Challenges and Expectations:	1. Uncertainties in overseas markets and the changing market demand, while our ability to positively respond is restricted	2. Increasing costs of production due to high costs of inputs, freight, marketing	3. Unfavorable weather conditions impacted by Climate Change factors	4. Unreliable shipping schedules	5. High quality standards and stricter quarantine requirements for Tonga's produce	6. Informal market, true of sector's contribution underestimated
15	Tuvalu			Key Issues and concerns (and challenges)	1. Poor agricultural extension services in the outer islands	2. Often poor cooperation between Falekaupule and agriculture extension staff	3. Lack of proper facilities to keep and market poultry and livestock which has resulted in increasing reliance on imported products	4. Lack of suitable land for gardening, especially on Funafuti, limiting possibilities for cash crop production, or growing fruit and vegetables for household consumption	5. Diminishing traditional knowledge of farming pulaka and taro	6. Deteriorating conditions many pulaka through environmental changes including salination
	Vanuatu			Main Constraints and issues:	1. Absence of an appropriate policy for agriculture sector	2. Difficulties for access to trade and marketing opportunities	3. Diversification of food and cash crops	4. High cost of shipping	5. Lack of proper infrastructure	6. Poor participation of government stakeholders

1. Nat. Ag. Strat. Summary | 2. Vision Challenges Issues | 3. Priorities | 4. Commodities | 5. Other nat. policies | 6. Country information | 7

Ready | 100% | 4:52 p.m. 2/05/2015

Annex C PAPP Inventory Matrix Final 30 April 2015 - Microsoft Excel non-commercial use

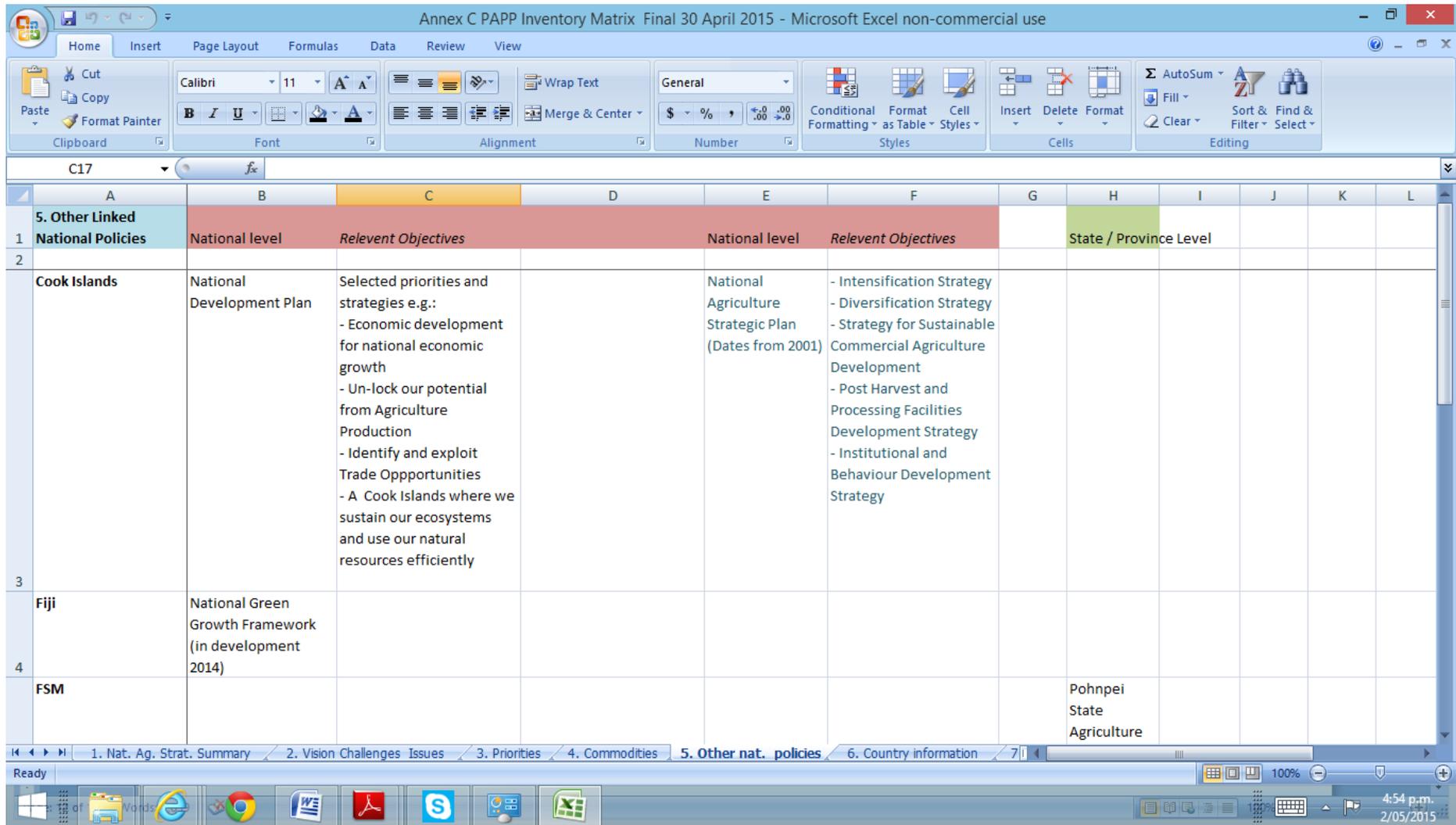
3. National Priorities										
Category 1										
8	Nauru	Strategies	1. Develop local food and agricultural production initiatives such as kitchen gardens, fruit tree planting and root cropping	2. Promote production of value added forestry and agroforestry products for domestic consumption	3. Promote commercially viable piggeries, duck and poultry (egg production) and agricultural businesses	4. Set up a resource centre on agricultural and livestock production				
9	Niue	Strategies	Agriculture: Facilitate agricultural development of products for food and nutrition security, and with proven commercial merits, particularly noni and vanilla though research and product and market development.	Trade and Marketing and Investment: Promote and secure markets for our products. Seek and encourage venture capital investments and skills and technology transfer.	Forestry: Protect and conserve the forest and explore forestry and agro-forestry products					
	Palau	Medium-term goals	1. Encourage and promote expansion of existing farms.	2. Encourage development of new farms.	3. Encourage and promote development of new plantations of local tree species with economic value.	4. Improve and strengthen watershed management/protection and quarantine	5. Improve and strengthen Plant and Animal Health Protection and Quarantine programs	6. Improve the sustainability of agriculture based livelihoods through enhance farm	7. Encourage and promote livestock production.	8

Annex C PAPP Inventory Matrix Final 30 April 2015 - Microsoft Excel non-commercial use

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	4. Commodities Listed	food crops			x															
2		banana	plantain	cocoa	coconut			coffee	Tea	candlenut	peanut	kava (and betel nut	rice	Wheat	sugar	breadfruit	Maize	Corn	pandanu	
3						Copra	coconut oil													
4	Cook Islands	1	1		1		1													
5	Fiji				1							1	1	1		1				
6	FSM	1			1	1	1					1	1				1			
7	Kiribati	1			1													1		
8	Marshall Islands	1			1	1	1											1		
9	Nauru	1			1													1		
10	Niue																			
11	Palau				1															
12	PNG			1	1	1	1	1	1				1	1	1	1			1	
13	Samoa	1			1	1		1												
14	Solomon Islands			1	1			1								1				
15	Timor-Leste			1	1			1			1				1				1	
16	Tonga				1															
17	Tuvalu																			
18	Vanuatu	1		1	1	1	1	1			1	1		1					1	
19																				
20																				
21																				
22		7	1	5	13	4	5	5	1	1	1	3	3	5	1	2	4	2	1	
23																				
24																				

1. Nat. Ag. Strat. Summary | 2. Vision Challenges Issues | 3. Priorities | 4. Commodities | 5. Other nat. policies | 6. Country information | 7

Ready | 100% | 4:53 p.m. 2/05/2015



Annex C PAPP Inventory Matrix Final 30 April 2015 - Microsoft Excel non-commercial use

6. Country Information*	Population	Land area (sq km)	land use: arable land (%)	highest elevation (m)	Agriculture % of GDP	% Labour force in agriculture	
1							
2	Cook Islands	10134	236	0.08	652	5.1	29
3	Fiji	903207	18274	9.2	1324	11.7	70
4	FSM	105681	702	2.9	791	14	0.9
5	Kiribati	104488	811	0.02	81	24.3	2.7
6	Marshall Islands	70983	181	11.1	10	14.3	11
7	Nauru	9488	21	0	61	6.1	N/A
8	Niue	1190	260	3.8	68	23.5	N/A
9	Palau	21186	459	2.2	242	3.2	20
10	PNG	6552730	462840	0.6	4509	27.6	85
11	Samoa	196628	2831	2.8	1857	10.2	65
12	Solomon Islands	609883	28896	0.6	2310	50	75
13	Timor-Leste	1201542	14874	10.1	2963	2.6	64
14	Tonga	106440	747	21.3	1033	20.9	31.8
15	Tuvalu	10782	26	0	5	16.6	N/A
16	Vanuatu	266937	12189	1.6	1877	22.4	65
17							
18							
19							
20							
21							
22	* data from The World Fact Book as at February 2015 (https://www.cia.gov/library/publications/the-world-factbook/)						
23							

Annex C PAPP Inventory Matrix Final 30 April 2015 - Microsoft Excel non-commercial use

Home Insert Page Layout Formulas Data Review View

Clipboard: Cut, Copy, Paste, Format Painter

Font: Calibri, 11, Bold, Italic, Underline, Text Color, Background Color

Alignment: Wrap Text, Merge & Center

Number: General, Currency, Percentage, Decimals, Fractions

Styles: Conditional Formatting, Format as Table, Cell Styles

Cells: Insert, Delete, Format

Editing: AutoSum, Fill, Clear, Sort & Filter, Find & Select

D7

	A	B	C	D	E	F	G	H	I	J	K	L
1		7. Explanatory Notes										
2												
3		Matrix structure										
4		The matrix is in the form of an Excel Spreadsheet comprising six worksheets presenting different categories of information.										
5												
6		Worksheet 1: Summary:- The first worksheet presents headline information about the source document including the title and status of base document(s), agency responsibilities (where known).										
7		Worksheet 2: Vision Challenges Issues:- Worksheet 2 presents two linked types of information. The first three columns present Vision and Mission statements, along with high level goals or outcomes as they appear in the source document. The remainder of the columns present the issues and/or challenges identified in the source documents. In general these are set out in the preliminary narrative section of the strategy/plan ahead of a more formal listing of priorities/actions. The number and content varies across the various documents. The sector issues are more clearly stated in national agriculture sector plans than in other documents. For example the agency strategic or annual plans tend to focus on practical actions, while national development strategies focus on high-level goals. In both cases there is limited discussion of sector issues.										
8		Worksheet 3: Priorities:- Worksheet 3 lists the various priorities set out in each of the source documents. The general term 'priorities' covers a range of inputs under different titles (objectives, policy goals etc) as listed. Priorities are set out in two categories to allow the presentation of different levels of priority reflecting the structure of the source documents. The 'priorities' commonly combine multiple fields / concepts into single composite statements.										

Ready

2. Vision Challenges Issues 3. Priorities 4. Commodities 5. Other nat. policies 6. Country information 7. Explan. notes

100%

4:56 p.m. 2/05/2015

Annex D: Analysis Spreadsheet

Screenshot of a section of the spreadsheet used in the analysis to show layout and content (Original is a separate Excel Spreadsheet).

	A	ET	EU	EV	EW	EX	EY	EZ	FA	FB	FC	FD	FE	FF	FG	FH	FI	FJ	FK
1						Food Security						Sustainability and re							
2		Poverty Alleviation				General	nutritiona	Traditiona	Village ag	Reduce dependency	General	Climate change							Disaster r Na
3		Employment		General	Rural Livelihoods										Adaptatio	Water			Irrigation and drainage
4																			watershed management
5																			
6	Cook Islands		0			4	1	1	1		1	13	1		1	1			1
7	Fiji		0			1	1					10		1		1		1	
8	FSM		1		1	3	1	1	1			6		1					1
9	Kiribati		0			2			1		1	12		1		1			1
10	Marshall Islands		1		1	2			1		1	11	1	1		1			
11	Nauru		0			2		1			1	3	1			1			
12	Niue		0			2	1	1				4	1	1					
13	Palau		0			1			1			11			1			1	
14	PNG	1	1		1	3	1	1			1	7			1				
15	Samoa		2		1	1	4	1	1		1	13	1	1	1	1			1
16	Solomon Islands		2		1	1	2	1			1	6		1					1
17	Timor-Leste	1	2		1	1	2		1		1	8	1	1		1			1
18	Tonga		0			2	1	1				4	1	1					
19	Tuvalu		1		1	4			1	1	1	2							
20	Vanuatu	1	0			3	1	1	1			6	1	1					1
21																			
22																			
23	Total count	3	10	3	7	37	9	11	6	2	9	116	8	9	4	7	1	4	3
24																			
25																			

Annex E: List of Commodities (alphabetical)

Avocado	Maize	Timber trees
Bamboo	Mangoes	Tomato
Banana	Mangrove	Traditional crops, fruits and vegetables
Barramundi	Mungbean	Turmeric
Beef/dairy	Muscovy ducks	Vanilla
Bees	Neutraceuticals	Water buffalo
Betelnut	Niche crops	Watermelon
Betel pepper	Noni/nonu/nono/nin	Wheat
Black pepper	Nuts	Yams
Breadfruit	Oil palm	
Cabbage	Okra	
Candlenut	Orchids	
Carambolla	Pandanus	
Cardamon	Passionfruit	
Caribbean pine	Paw paw/papaya	
Carp	Peanut	
Cash crops	Pepper	
Cassava	Pigs/swine/pork	
Citrus	Pineapples	
Chicken	Plantain	
Chillies	Poultry	
Coconut (copra, coconut oil)	Quail	
Coffee	Rabbits	
Corn	Rainbow trout	
Crocodile	Rice	
Custard apple	Root crops	
Delicious cacti	Rubber	
Draft animals	Sago	
Dragonfruit	Sandlewood	
Eggplant	Seed	
Feed	Sheep	
Floriculture	Small ruminants	
Fruits and vegetables	Sorghum	
Ginger	Spices	
Goats	Squash pumpkin	
Guinea pigs	Sugar	
Habanero	Sweet potato	
Island cabbage	Tahitian lime	
Kava/yaqona	Taro/dalo	
Livestock	Tea	
Maire	Tilapia	

Annex F: Table of National legislation appearing in source documents

	Solomon Islands	RMI	Tonga
Agriculture			
	Bee industry Act 1996		Copra Act
	Agriculture Quarantine Act 1982		Forests Act
	The Diseases of Animal Act 1972	Animal and Plant Inspection Act	Animal Diseases Act
		Agricultural Supplies Account Act 1979	Pounds and Animals Act
			Markets Act
			Noxious Weeds Act
			Pesticides Act 2002
			Rhinoceros Beetle Act
Food Safety	Consumer Protection Act 1995		
	Pure Food Act 1996		
Trade	The Custom Act 1960		Agricultural Commodities Export Act 2002
	The commodity export marketing authority [Act] 1985		
	Livestock Development Authority [Act] 1977		
		Export Meat Inspection Act	
Biosecurity	Biosecurity Bill 2008		Plant Quarantine Act
Environment	Environment Act 1998		
	Wildlife protection and management Bill 1998		Birds and Fish Preservation Act
		Endangered Species Act	

PNG: Organic Law

Fiji: 33 Acts

Kiribati: Biosecurity Bills

Annex G: Summary of national processes to develop national agriculture sector plan

The **Fiji** process involved:

- Assessment of Physical and Organizational Resources of The Agriculture, Fisheries, and Forestry Sectors in Fiji
- Historical Overview of Government Policies
- Review of Policy Papers
- Consultation with Stakeholders
 - Stakeholder meetings with government agencies
 - Consultations with farmers, private sector, international development organizations, non-government organizations and educational institutions
- SWOT Analysis
- Preparation of Agriculture Development Agenda Framework
- Public Consultation (-Two public consultations in Nadi and Suva)
- Formulation of the Fiji 2020 Agriculture Development Agenda

The Agriculture Policy of **FSM** “is the conclusion of a participatory consultative process among a wide range of stakeholders across the four states”.

In **PNG**:

- Workshops were held in four regions to create awareness among stakeholders
- Previous recommendations, policies and plans were considered (including provincial plans and those of commodity organizations)
- A Technical Advisory Committee was established
- A National Project Steering Committee was created
- A two-day national consultation meeting was held

In **Samoa**, development of the plan “was led and coordinated by the MAF with the support of the Ministry of Natural Resources and Environment (MNRE) and in close consultation with the MOF and several public sector agencies as well as with private sector stakeholders including representatives of various farming and fisheries associations.”

In the **Solomon Islands**:

- A Policy Steering Committee was established
- A desktop review was carried out of national policies, reports and previous studies
- Broad public consultations were conducted using a participatory approach
- Stakeholder consultations were held in four provinces

Vanuatu described a process over several years involving:

- Conceptualization processes and workshop amongst agency technical staff
- A National Inception workshop
- Consultations in six provincial centres to seek endorsement from stakeholders
- Formal adoption by government (yet to be concluded)