



ENHANCING LINKAGES BETWEEN TOURISM AND THE SUSTAINABLE AGRICULTURE SECTORS IN THE UNITED REPUBLIC OF TANZANIA



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Acronyms

ACP	Africa, Caribbean and Pacific countries
AFIP	Agriculture and Food Investment Plan
AU	African Union
CAADP	Comprehensive Africa Agriculture Development Programme
CERES	Certificate of Environmental Standard
COLEACP	Europe-Africa-Caribbean-Pacific Liaison Committee
CTI	Confederation of Tanzania Industries
EAC	East African Community
EAOM	East African Organic Mark
EAOPS	East African Organic Products Standard
EU	European Union
FIEC	Food In Every Country
GAP	good agricultural practices
HAT	Hotel Association of Tanzania
HODECT	Horticulture Development Council of Tanzania
IFOAM	International Federation of Organic Agriculture Movements
IMO	Institute of Marketecology
IPM	integrated pest management
IQM	internal quality management systems
JAS	Japan Agricultural Standard
LDC	least developed country
MAFSC	Ministry of Agriculture, Food Security and Cooperatives
MNRT	Ministry of Natural Resources and Tourism
NBS	National Bureau of Statistics
NEPAD	New Partnership for Africa's Development
NOP	National Organic Program
oGAP	organic good agricultural practices
PiP	Partners in Protection program
PGS	participatory guarantee systems
PPT	pro-poor tourism
RTTZ	Responsible Tourism Tanzania
SADC	Southern African Development Community
SAGCOT	Southern Agricultural Growth Corridor of Tanzania
SAT	Sustainable Agriculture Tanzania
SB	SafariBookings™
SECO	Swiss State Secretariat for Economic Affairs
TanCert	Tanzania Organic Certification Association
TATO	Tanzania Association of Tour Operators
TBS	Tanzania Bureau of Standards
TCA	Tanzania Chefs Association
TCCIA	Tanzania Chamber of Commerce Industry and Agriculture
TIC	Tanzania Investment Centre
TIRDO	Tanzania Industrial Research and Development Organization
TNBC	Tanzania National Business Council
TOAM	Tanzania Organic Agriculture Movement
TTB	Tanzania Tourist Board
USDA	United States Department of Agriculture
WTTC	World Travel & Tourism Council

KEY FINDINGS

The United Republic of Tanzania has vast untapped natural resources, including an abundance of wildlife, unexploited mineral reserves and arable land, which offer a wide range of development opportunities.

Tourism and agriculture are important contributors to the development of the local economy. Many developing nations that are now experiencing rapid tourism growth have agrarian societies and tourism is the first or second source of export earnings. For example, 20 out of the world's 48 least developed countries (LDCs) rely on tourism and agriculture as the basis for the livelihoods of most of their inhabitants. It is imperative, therefore, that these sectors receive close attention, especially concerning the economic opportunity relationships that arise from tourism and sustainable agriculture. The main objective of this report is to enhance the understanding of linkages between these two sectors, as well as propose suggestions for how they could be strengthened with the aim of promoting bottom-up sustainable development in the United Republic of Tanzania.

Our report has close linkages with the joint initiative issued by the United Nations Inter-Agency Cluster on Trade and Productive Capacity, Ministry of Industry and Trade of the United Republic of Tanzania and the Swiss State Secretariat for Economic Affairs (SECO). The report lays the foundation for a more long-term strategy involving policy recommendations and guidelines for a national action plan. Our results are based on pro-poor tourism, which is an approach that aims at generating net benefits for the poor, including unlocking opportunities by building a more supportive policy and planning framework. The goal is to promote participation and bring the private sector into pro-poor partnerships through not only providing jobs to local people but also through purchasing local products.

The first stage in producing this report was to understand tourism development in the United Republic of Tanzania and identify its source markets. The average international tourist to the country is someone from Africa or Europe travelling with a spouse. They use a tourist agency to make travel arrangements and usually arrive by air. They stay in a hotel for around 10 days, eat out at local restaurants and enjoy the country's wildlife and beautiful beaches. On average, they spend US\$ 1 690 per person.

With tourism growing rapidly in the United Republic of Tanzania, there is an opportunity to integrate pro-poor strategies into the international tourism agenda. Consumption of local food is broadly recognized as an essential part of the tourist experience and the majority of the country's poor inhabitants live in rural areas. In this context, linking pro-poor tourism initiatives with small-scale producers can have a pivotal role in fostering local rural development since agriculture is a prominent source of livelihoods. Also, agriculture is the sector that has the greatest potential linkages with tourism. Our report indicates food and beverages is an important sector, since this category has direct linkages with local agriculture. For example, the food and beverages sector is responsible for about 22 per cent of international tourism earnings in the country and has direct linkages with local agriculture.

Horticultural products like fruits, herbs and spices are important ingredients in Tanzanian restaurants and hotels. Despite the fact that horticultural production represents a small part of the overall agricultural production yield and value in the country, the sector makes a significant contribution to food security, improving nutrition, rural livelihoods and economic growth, since production is mainly based on small-scale farming.

Conventional thinking has been that the key issue for poverty reduction and economic growth of small-scale farmers and other stakeholders within agricultural supply chains – especially horticultural supply chains – is to gain access to more profitable niches, such as exports. This assumes that local and regional markets are stable and do not offer opportunities for growth. Yet, a growing body of evidence is showing that the local, national and regional markets are themselves experiencing large transformations driven by a variety of factors. For instance, domestic markets based on supplying international tourists through restaurants and accommodation services have more in common with export markets in terms of grades, standards, business practices and prices than is often perceived, as well as diversity of consumers and expectations. As a result, local supply should offer a minimum standard of quality and stability. Our interviews with stakeholders have

clearly established the importance of quality, reliability of delivery and price as determining factors.

Consequently, opportunities to purchase horticultural products locally are often not exploited by restaurants and hotels. Poor quality and inadequate quantity are the result of inefficiencies within local supply chains. For example, local farmers are not sufficiently aware of restaurant and hotel requirements, health and safety regulations, and tourist preferences to match the required quality. On the one hand, small-scale farmers often cannot access credit to invest in upgrading production to meet such requirements, unless they have secure contracts to present to funding agencies. On the other hand, hotel managers, restaurant owners and purchasing officers are used to existing channels using brokers and do not consider new local options despite an interest in improving their suppliers. In fact, most perceive local products as inferior and unreliable, preferring imported and wholesale goods because it is more convenient and they do not want to change existing supplier relationships. In short, small-scale farmers can supply fresh and high quality products and restaurants and hotels want to buy them. However, there is no operating market. There are no direct supply channels bridging buyers and sellers in order to share information and negotiate contracts and delivery.

Clearly, tourism and agriculture have an important contribution to make to local development in the United Republic of Tanzania. However, horticultural supply chains face a number of constraints that hold back growth and competitiveness in reaching the local tourism industry. These constraints can be divided into two main categories: lack of direct communication channels; and bottlenecks or inefficiencies in the supply chain.

Our report concludes that the United Republic of Tanzania has so far developed forward-thinking and effective legislation to promote the private sector at the national level and the tourism sector is already benefiting from this. This effort should be consolidated and supported at district and local levels in order to foster pro-poor practices through horticultural production from small-scale producers and connect their production to local and regional markets supplying the local hospitality industry.

In order to promote sustainable development, this report proposes a set of potential thematic strategies that can be used as stepping-stones for building an institutional framework able to link the tourism and agriculture sectors at multiple levels – country, regional, local and community. These strategies aim at generating net benefits for small-scale farmers and include unlocking opportunities by building a more supportive policy and planning framework. The thematic strategies are:

- Awareness and capacity building: Raising awareness and building capacity to attain a high level of consciousness, understanding and ability in support of the implementation of linkages between tourism and agriculture are critical.
- Start-up drivers (Utalii na Kilimo Kwanza): Selecting regions that can serve as multipliers based on successful local experiences such as the growth corridors initiative.
- Public-private partnerships and destination level cooperation and action: The private and public sectors and destination stakeholders are key components in the implementation of pro-poor tourism (PPT) practices. Achieving the objectives of this strategy will rely on collective commitment, strategic partnerships, effective institutional arrangements and facilitating processes. The theme also addresses the lack of supportive funding and other mechanisms as a key constraint in improving linkages.
- Effective promotion of pro-poor tourism and branding: This strategic theme focuses on the need for promotion of PPT products, experiences and destinations in the United Republic of Tanzania through an effective and robust marketing plans and branding.

These four themed strategies indicate ways to empower a cooperation platform linking tourism and agriculture in the United Republic of Tanzania. However, they require a detailed action plan, which should be developed by the national government together with local stakeholders, outlining interventions for each type of strategy.

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