

DRIVING FOOD SYSTEM TRANSFORMATION IN KENYA VIA AGRITOURISM MARKETS



A STAKEHOLDER ROUNDTABLE CONSULTATION

March 16, 2022

SUMMARY REPORT

ACKNOWLEDGEMENTS

The organizing institutions wish to thank supporting institutions and individuals, including FANRPAN, FAO, and Professor Roselyn Okech; participating stakeholders from the public and private sectors; and the organizing institutions' staff for their contribution to an engaging and constructive consultation.

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ACRONYMS

FANRPAN	Food, Agriculture and Natural Resources Policy Analysis Network
FAO	Food and Agriculture Organization
KENAFF	Kenya National Farmers Federation
KIPPRA	Kenya Institute for Public Policy Research and Analysis
KTB	Kenya Tourism Board
MoALF&C	Ministry of Agriculture, Livestock, Fisheries, and Cooperatives
TOR	Terms of Reference
UN	United Nations
UNFSS	United Nations Food Systems Summit
UNWTO	United Nations World Tourism Organization

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In Kenya's Big Four Agenda, the Government's action plan to support its Vision 2030, the transformation of the country's food system – the way in which food is produced, processed, and consumed – is identified as a national priority



Kenya's National Tourism Blueprint 2030 has identified agritourism as a priority sub-sector to achieve its product diversification goals. A successful agritourism strategy is a direct pathway to the country's food and nutrition security agenda as demand for fresh, local, nutrient-dense food products is currently driving agritourism market trends

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A STAKEHOLDER ROUNDTABLE CONSULTATION

A. Background

On 16 March 2022, a public-private sector stakeholder consultation was convened to discuss opportunities for maximizing opportunities in agritourism markets to support the country's food and nutrition agenda and other sustainable development goals. The event, which was hosted by the Kenya Institute for Public Policy Research and Analysis (KIPPRA) and implemented in collaboration with AgriLuxe Marketing, is the first of two preliminary roundtable consultations planned. The second is aimed at the ministerial level. The activity is linked to the proposed applied research, "Making agritourism markets work for transforming food systems in Sub-Saharan Africa," which seeks to explore the role of the agritourism sector in facilitating positive structural change in broken food systems – at the national and regional levels. Kenya is one of four African countries targeted in the investigation¹.

B. Objectives

The overall objective of the stakeholder consultation² was to seek feedback on the proposal. More specifically, at the end of the consultations, the aim was to answer at least the following five questions:

1. What does AgriTourism mean for Kenya?
2. Could AgriTourism investments yield substantive social, economic, and environmental returns within the context of Kenya's agriculture, tourism, and food & nutrition security agendas?
3. If yes, what are the key AgriTourism products and services for which Kenya will have a competitive advantage?
4. What would a cross-sectoral strategy/approach look like to ensure a competitive AgriTourism sub-sector in Kenya?
5. How do we move forward?

¹ The proposed initiative for Kenya was circulated as a concept note to stakeholders in preparation for the consultation

² A related stakeholder dialogue was convened for South Africa in June 2021 as contribution to the UN Food System Summit, 2021

C. Overview of Discussions

Perspectives from the organizers and supporting institutions

The meeting was opened by the organizers and supporting institutions. The Heads of KIPPRA, FARNPAN, and representative of the FAO country office provided insights on the relevance of the topic, while the Head of AgriLuxe Marketing provided an overview of the trends and market drivers in the agritourism subsector. Some of the key takeaway messages:

- AgriTourism is an important sub-sector, very much relevant to the economic growth and development agenda of Kenya and other Sub-Saharan countries. Included among the benefits highlighted by the opening speakers are improved livelihoods for farmers, increased local food production, increased cultivation of and access to indigenous, nutrient-dense crops, and promotion of local culture and culinary assets
- There is a need to both increase evidence-based research and ensure research findings are translated into implementable policies to enable Kenya's agritourism to be globally competitive
- Current data show that one of the key drivers of agritourism markets – and by extension the potential of the sub-sector to have a direct impact on Kenya's food and nutrition security agenda – is the increasing health consciousness of travelers, which influences their purchasing decisions. For example, 66% of respondents on a 2021 global online survey³ indicated that they search for healthier food options when they travel and are willing to pay a price premium to obtain it.
- There is a willingness, based on each institution's mandate, to explore opportunities to support the development of Kenya's agritourism sub-sector



“There are possibilities for partnerships in promoting agritourism within the context of at least three of FAO’s strategic pillars for Kenya – facilitating an enabling policy environment, supporting inclusive value chains, and promoting food system dialogues.” **Mr. Tito Arunga, on behalf of the FAO Country Representative, Kenya**

³ AgriTourism Questionnaire: Travelers’ Preferences/Sentiments, 2021, AgriLuxe Marketing

Perspectives from the private sector

Dr. Daniel M M'Mallutha, CEO of the Kenya National Farmers Federation, Ms. Millicent Onditi, Food Safety Trainer and Nutrition Chef, at the Utalii College⁴, and Mr. Nic Omundo, Chef-Entrepreneur and Chefs Manifesto Representative led the panel discussion through a private sector lens⁵. Key take away messages from the discussion and other participants' responses during the Q&A session:

- KENAFF has been actively supporting agritourism through farm tours since 2006 when it established agritourism centers in Tharaka Nithi and Kisumu. Key farms targeted are tea, coffee, and dairy, with avocado being new farm tour product being considered
- Utalii College promotes agritourism through food fairs. A key challenge is the inability of supply to match the increasing demand for local, nutritious, gourmet cuisine and a cultural culinary experience
- Related to the supply challenge is the lack of coordination in the value chain, a result of which is a disconnect between farmers, chefs, and consumers. Wholistic assessment from the farm-to-the-fork is therefore needed to identify bottlenecks and solutions to enable an efficient and competitive agritourism environment
- Livestock was deemed to have strong potential, particularly focusing on Boran bulls. Promotion of pineapples was suggested as another potential area to support agritourism
- There was a call for tax incentives to support the sub-sector, such as those that will support infant Kenyan industries to develop in the face of competition from food imports and those that will motivate cultivation and production of indigenous and healthier crops and food products



“The focus of KENAFF’s agritourism programming has been to enhance farmers’ income through diversification of revenue streams. However, food and nutrition security is certainly an idea KENAFF is ready to weave into the federation’s agritourism services.” **Dr. M’Mallutha**
CEO, KENAFF

⁴ Kenya Utalii College, a public sector institution, is part of the Department of Tourism and Wildlife but strives to implement its mandate influenced by a private sector model

⁵ Invitation to participate in the consultation was extended to other private sector stakeholders



“Chefs have three key roles in the agritourism value chain: (i) nourish – we must prepare nutritious food for consumers; (ii) educate – we must raise awareness on food & nutrition trends, particularly among farmers, and (iii) create – we must craft a unique culinary experience for travellers.” **Mr. Nic Omundo, Chef-Entrepreneur**



“Utalii College has a pivotal role in training for the local and global hospitality and tourism industry. Apart from the industry being the largest consumer of agricultural products, training in food safety systems along the food flow chain, healthy and cultural cuisines are some of the areas the industry cannot ignore to promote food system transformation via agritourism markets.” **Ms. Millicent Onditi, Kenya Utalii College**

Perspectives from the public sector

Mrs. Immaculate Nyaugo, Mrs. Naomi Kamau, and Mrs. Jennifer Musango represented the Ministry of Health; the Ministry of Agriculture, Livestock, Fisheries, and Cooperatives (MoALF&C); and the Tourism Research Institute respectively on the public sector panel discussion. Key take away messages from the panel discussion and other participants' responses during the Q&A session:

- The concept of agritourism sub-sector is aligned with objectives of the Agricultural Sector Transformation and Growth Strategy (ASTGS) 2019-2029, particularly related to increasing farmer's income, increasing productivity and value-adding enterprises, enhancing food security, and improving market access and trade
- The multi-sectoral platform established by MoA to support stronger coordination between agriculture and nutrition is an opportunity to engage and support coordination issues to strengthen Kenya's agritourism sub-sector
- Kenya faces a triple burden in nutrition: malnutrition, undereating/overeating, and a lack of health awareness. The agritourism-food system transformation nexus discussions are therefore timely
- There were additional calls for tax incentives to promote encourage farmers, food processors to produce healthier foods and consumers to choose healthier options
- There were also calls to increase marketing of healthier foods and transparency in labelling of products to improve consumer awareness. The need for creativity

in content development and use of multiple marketing platforms were emphasized as crucial to helping change mindsets and behaviors

- The Tourism Research Institute is undertaking value chain analyses to identify gaps to and propose solutions for addressing value chain inefficiencies, including coordination failures



AgriTourism initiatives will directly and indirectly aid in achieving the objectives of the Agricultural Sector Transformation and Growth Strategy 2019-2029,” **Mrs. Naomi Kamau, MoALF&C**



“AgriTourism markets exist, the challenge is that the products and services in Kenya are not yet developed to meet market demands,”
Mrs. Margaret Kamau,
CRM & Partnerships
Manager, Kenya
Tourism Board

Objectives revisited

The following box highlights outcomes of the consultation's objectives. These assessments are preliminary and are expected to be further investigated in the proposed research and ongoing stakeholder consultations

1. What does AgriTourism mean for Kenya?

Feedback shows that most agritourism activities in Kenya involves farm tours primarily in cultivated crops: tea, coffee, dairy. Food fairs are also promoted. There is therefore scope for other market segments both within the core and periphery categories, as outlined in the definition of AgriTourism in the concept note for the proposed applied research.

2. Could AgriTourism investments yield substantive social, economic, and environmental returns within the context of Kenya's agriculture, tourism, and food & nutrition security agendas?

Based on the strategy documents for Kenya's agriculture, tourism and food & nutrition security agendas and feedback from related stakeholders, the answer is yes. More detailed evidence is expected through the implementation of the proposed applied research and continued dialogue with stakeholders.

3. If yes, what are the key AgriTourism products and services for which Kenya will have a competitive advantage?

See response above to question 1

4. What would a cross-sectoral strategy/approach look like to ensure a competitive AgriTourism sub-sector in Kenya?

The multi-sectoral platform established under the MoALF & C's Agriculture-Nutrition platform will be a starting point to explore how it can serve the needs of an agritourism promotion agenda

5. How do we move forward?

See "Next Steps" section below

D. Next Steps

This consultation was planned as the first of two consultations for raising awareness of the proposed applied research on agritourism and for fine-tuning the proposal, based on the feedback. The second consultation will target stakeholders at the ministerial level. In preparation for this second consultation, some of the immediate next steps include additional follow-up meetings with stakeholders from first discussion to advance the fine-tuning of the concept paper and preparations for consultation 2. More specifically, next steps will include further discussions with targeted stakeholders to explore/agree on:

1. How the proposed research can be synergised with and/or build on relevant country initiatives, including the:

- a) tourism value chain analysis currently being undertaken by the Tourism Research Institute and the United Nations Economic Commission for Africa (UNECA);
 - b) National Agro-Tourism Strategic Plan 2012-2016; and the
 - c) FAO Green Cities Initiative
2. How, within the context of 1(a)-(c), the concept paper for the proposed research on agritourism could be enhanced in terms of its objectives, scope, and sequencing. Further, as part of the first stage of the proposed research, a terms-of-reference (TOR) has been outlined to undertake a mapping of Kenya's agritourism environment. The roundtable consultation has provided some invaluable insights on some of the questions posed in the TOR. The TOR will be shared to seek additional feedback on the approach to this mapping exercise and to identify additional potential data sources.
3. The role of each institution in supporting the proposed research on agritourism, including sharing of data/sources.
4. Plans for the second consultation at the ministerial level

"From a food and nutrition security and food system transformation perspective, tourism and agriculture make good commercial and development partners. The partnership is particularly important to smallholder producers for many reasons, including (i) it brings markets closer to home and (ii) it helps them to diversify from low value commodities to high-value specialty products and services⁶."



⁶ Driving Food System Transformation in Kenya Via AgriTourism Markets, Concept Paper

ANNEX

Final Agenda

DRIVING FOOD SYSTEMS TRANSFORMATION IN KENYA VIA AGRITOURISM MARKETS STAKEHOLDER ROUNDTABLE CONSULTATION

DATE: 16 March 2022

VENUE: Fairview Hotel, Nairobi

TIME	ACTIVITY
08.30 – 09.00	Arrival and Registration
Opening Session: Moderator	Mr. Joshua Laichena, Policy Analyst, KIPPRA
09.00 – 09.10	Welcome/ Introduction and review of the agenda
09.10 – 09.30	Opening Remarks – To highlight relevance of the work <ol style="list-style-type: none">1. Dr. Rose Ngugi, Executive Director – KIPPRA2. Mr. Tito Arunga on behalf of the Country Representative – FAO3. Dr. Tshilidzi Madzivhandila, CEO, FANRPAN
09.30 – 09.50	Brief overview of the Concept “ <i>Driving Food Systems Transformation in Kenya Via Agritourism Markets</i> ” Ms. Jeanette Sutherland, CEO, AgriLuxe Marketing
Panel Discussion: Moderator	Professor Roselyn Okech, Grenfell Campus, Memorial University
09:50 – 11:00	Brief Insights on Kenya’s AgriTourism Potential <ol style="list-style-type: none">1. Dr. Daniel M M’Mallutha, CEO, National Farmers’ Association2. Mr. Nic Omundo, Chef-Entrepreneur, East Africa-Acumen Leadership Fellow, and Member of Chefs’ Manifesto3. Ms. Millicent Onditi, Food Safety Trainer, Nutrition Chef, Hospitality Educator, Kenya Utalii College
11:00 – 11.10	HEALTH BREAK
11:10 – 12:15	Brief Insights on Kenya’s AgriTourism Potential Cont’d <ol style="list-style-type: none">4. Mrs. Naomi Kamau, Ministry of Agriculture, Livestock, Fisheries & Cooperatives – Agri-Nutrition Platform5. Mrs. Jennifer Musango, Ministry of Tourism and Wildlife –Tourism Research Institute6. Mrs. Immaculate Nyauogo, Ministry of Health – Department of Preventative and Promotive Health
Plenary Session: Moderator	Professor Roselyn Okech, Grenfell Campus, Memorial University
12:15 – 12:50	Open Discussion
Closing Session Moderator	Mr. Joshua Laichena, Policy Analyst, KIPPRA
12:50 – 13:00	Summary of key points and next steps
13.00 – 14.00	Lunch and Departure