



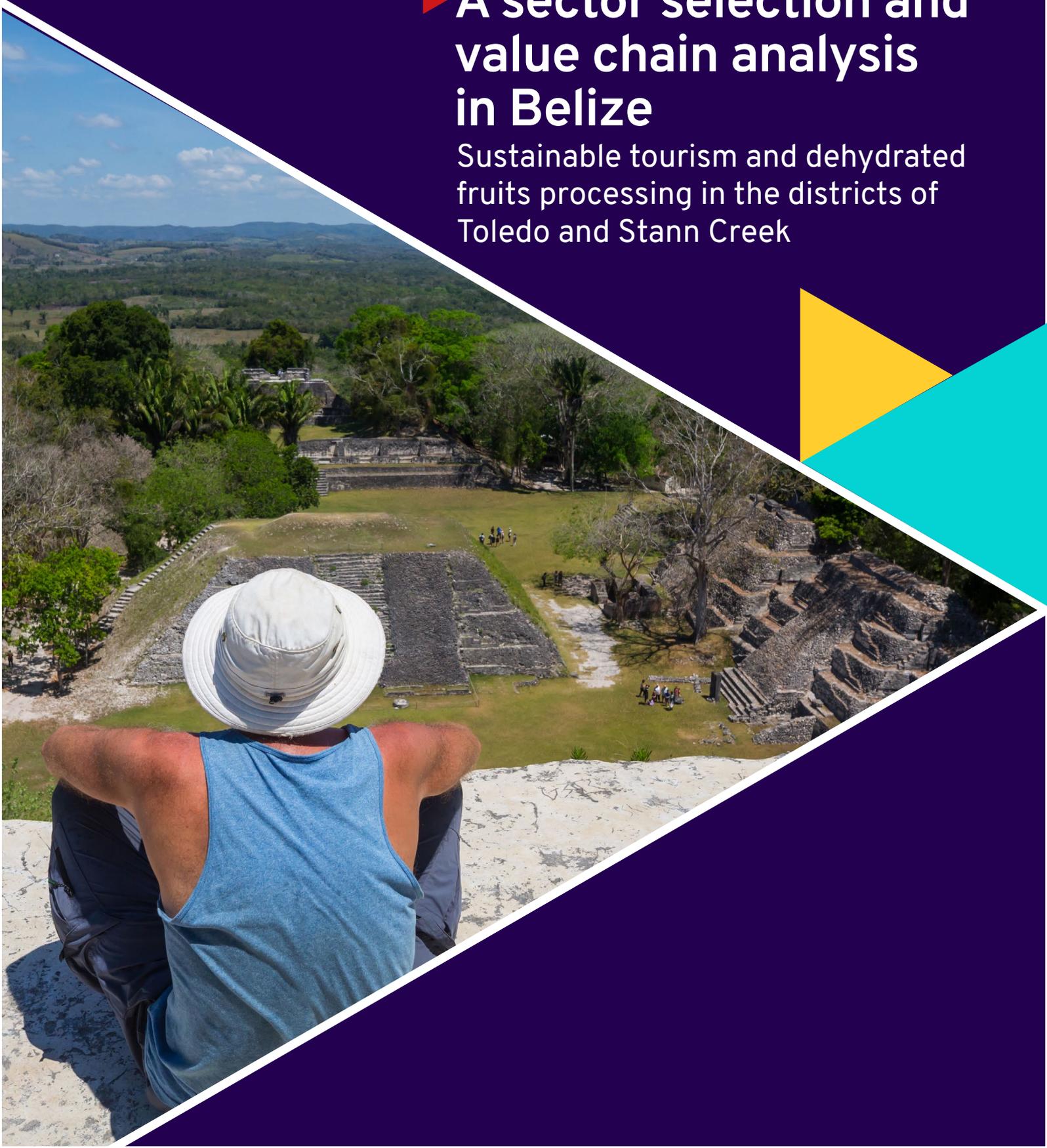
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▶ A sector selection and value chain analysis in Belize

Sustainable tourism and dehydrated fruits processing in the districts of Toledo and Stann Creek



▶ **A sector selection and
value chain analysis
in Belize**

Sustainable tourism and dehydrated
fruits processing in the districts of
Toledo and Stann Creek

By Miguel Macias, ILO Consultant

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► Foreword

Belize's social protection system currently faces challenges of fragmentation and has not sufficiently leveraged the existing resources, shared technical capacities, and knowledge from the different stakeholders. Evidently there is need to galvanize and fast-track broad commitment to addressing the rights and needs of the populations that are most vulnerable and left furthest behind. These populations – primarily, the urban and rural poor – are often characterized as workers in the informal economy who experience persistent poverty driven by socio-economic exclusion.

To respond to the urgent need to address these challenges, the International Labour Organization (ILO) Decent Work Team and Office for the Caribbean has prepared this publication within the framework of the Government of Belize / United Nations Joint Sustainable Development Goal (SDG) Fund Programme: Building a resilient Belize through universal, adaptive, and sustainable social protection. It focuses on two key sectors – agriculture and tourism. Both have enormous potential to contribute to local inclusive and sustainable economic growth in Belize. They are also shaped by a predominance of informality.

Through a value chain analysis of two subsectors – sustainable tourism and dehydrated fruits processing – this report explores social protection deficits and addresses opportunities and risks that should be considered when developing and implementing strategies that are designed to reduce and prevent poverty and vulnerabilities. It contends that the people of Belize stand to benefit greatly if the Government closes social protection gaps through an integrated and inclusive system that is responsive to shocks and disasters.

Further, this report advocates that through tripartite partnerships among Government ministries / agencies, employers' groups and trade unions, the strategies will lead to increased capacities and coordination that enable growth-based, gender-responsive micro-, small- and medium-sized enterprises (MSMEs) so that vulnerable groups will be better supported to access and participate in the social protection system. As a result, workers in both sectors will engage in greater economic opportunities, decent jobs, and livelihoods that will improve their standard of living. In turn, Belize will advance its commitments to the Sustainable Development Goals (SDGs), particularly, SDGs 5, 8, 10, 13 and 16.

Activities under the Joint Programme, such as this publication, contribute to several ILO Recommendations which aim to improve the environment for business, and targeting the most marginalized populations, including women and the youth. These include R204 - Transition from the Informal to the Formal Economy Recommendation, 2015 (No. 204) and R189 - Job Creation in Small and Medium-Sized Enterprises Recommendation, 1998 (No. 189).

I would like to express my appreciation to everyone who added directly or indirectly to the preparation of this sector selection and value chain analysis in Belize. Special thanks to the Joint SDG Fund Programme Technical Working Group and Results 2 Taskforce for their contributions. I also commend the following ILO staff for seeing the publication to successful completion: John Bliet, Pamela Bradley, Alexander Conesa-Pietscheck, Suzanne Joseph, Abi-Gail Toussaint and Shireen Cuthbert.

It is my hope that this publication serves as a valuable resource for decision-makers to better identify how to build resilience to socio-economic risks, particularly set against the backdrop of the external influence of current and future crises including climate change, geopolitical conflicts as well as the pandemic recovery.

I encourage efforts designed to bring about collaboration amongst all stakeholders as we work towards a just transition, advance social justice, and promote decent work for all in Belize.

Dennis Zulu
Director
ILO Decent Work Team and Office for the Caribbean

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► List of acronyms

BCCI	Belize Chamber of Commerce and Industry
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BDS	Business development services
BELTRAIDE	Belize Trade and Investment Development Service
BERF	Belize Enterprise Revolving Fund
BITI	Belize Indigenous Training Institute
BMDC	Belize Marketing and Development Corporation
BPO	Business process outsourcing
BTB	Belize Tourism Board
BTEC	Belize Training and Employment Centre
BZ\$	Belize dollar
CARICOM	Caribbean Community and Common Market
CBI	Centre for the Promotion of Imports from Developing Countries
CFAPU	Central Farm Agro-Processing Unit
DMC	Destination management company
EU	European Union
GDP	Gross domestic product
GOB	Government of Belize
GWh	Gigawatt hours
IDB	Interamerican Development Bank
ILO	International Labour Organization
ISIC	International Standard Industrial Classification of All Economic Activities
ITVET	Institute for Technical and Vocational Training

KW	Kilowatt
MAFFSD	Ministry of Agriculture, Forestry, Fisheries, and Sustainable Development
MICE	Meetings, incentives, conferences and exhibitions
MSD	Market system development
MSME	Micro-, small and medium-sized enterprise
NSTMP	National Sustainable Tourism Master Plan
NTUCB	National Trade Union Congress of Belize
OTA	Online travel agency
SBDC Belize	Small Business Development Centre Belize
SDG	Sustainable Development Goal
SIB	Statistic Institute of Belize
SICA	Central American Integration System
SME	Small and medium-sized enterprise
UNICEF	United Nations Children’s Fund
UK	United Kingdom
US	United States
US\$	United States dollar
UNDP	United Nations Development Programme
UNWTO	United Nations World Tourism Organization
UWI	University of the West Indies

► Executive summary

The present study was conducted within the framework of The Joint United Nations (UN) Sustainable Development Goals (SDG) Fund Programme to build a resilient Belize through universal, adaptive, and sustainable social protection in line with Horizon 2030: National Development Framework for Belize 2010-2030. One of the Programme's key objectives is to enhance the environment for micro-, small, and medium-sized Enterprises (MSMEs) to enable their expansion, reduce their vulnerability to shocks, and provide access to male and female entrepreneurs who have been hit hard by the pandemic's economic fallout. The study focuses on three target groups: women, youth, and the indigenous population.

This study was conducted by the International Labour Organization (ILO) Decent Work Team and Office for the Caribbean, utilizing the market system development (MSD) methodology developed by the ILO Enterprises Department. This approach offers a structured framework for identifying value chains that foster economic growth, job creation, and poverty reduction. Furthermore, it enables the identification of constraints and opportunities that may impact value chain performance. The ultimate objective is to develop and implement effective interventions that address these identified constraints, thereby enhancing outcomes. As a result, this approach aims to reduce underemployment and unemployment rates, improve productivity within the business ecosystem, and contribute to the advancement of Sustainable Development Goal 8 (Decent work and economic growth).

The selection of sectors for prioritization was based on their economic performance, specifically their contribution to the GDP and total employment. A joint taskforce then evaluated the alignment of these sectors with national policies and the resulting shortlist of six sectors¹ were identified based on their relevance in the Belizean economy and labour market; those sectors were furtherly assessed in a tripartite way to prioritize a more profound analysis in two value chains. The criteria used to perform this assessment are a) potential for employment creation, b) relevance for the target groups, and c) feasibility for intervention. Resulting from this analysis, two value chains were identified with different scopes of intervention, sustainable tourism in the short term and processing of dried and dehydrated food in the long term. While the recommendations outlined in the present report may be applicable nationwide, the in-depth analysis of these value chains in specific locations (Stann Creek and Toledo Districts) will provide valuable insights and serve as a foundation for developing targeted interventions.

Sustainable tourism

Currently, sustainable tourism is understood from two distinct perspectives. The first, and probably the most well-known, is ecotourism, which involves travel aimed at recreational activities to appreciate and learn about nature through direct contact (by 2021, the global ecotourism market size was valued at US\$185.87 billion). The second and more recent perspective focuses on transforming tourism services and popular destinations to generate a lower social and environmental impact with initiatives such as reducing emissions from transportation, incorporating sustainable practices to reduce energy consumption in accommodation, and engaging with corporate social responsibility programmes in the community.

Given its natural and economic conditions, Belize has organically positioned as an ecotourism destination. However, there are still some challenges to achieving full sustainability. Most of the transportation is still fossil fuel-based; accommodations need sustainable infrastructure such as solar heaters or rainwater harvesting systems; restaurants do not offer organic or sustainable menus, to mention a few.

¹ Organic cocoa, coconut, manufacturing of cooked pork meats, processing of dried and dehydrated food, sustainable tourism, business process outsourcing, and renewable energy.

Tourism in Belize is widely dependent on MSMEs; 70 per cent of the tourism employment and income in the country comes from this type of business. MSMEs tend to be the majority of businesses in food services, transportation, tour operation, and even housing (on average, an accommodation in Belize has 9.7 rooms).

Tourism in Stann Creek District

Tourism has emerged as a significant contributor to the economy of Stann Creek; the district accounts for 10 per cent of the Hotels and 17 per cent of the available rooms in the country. In addition, Stann Creek hosts two important archeological Mayan sites, Maintzunun and T'au Witz.

The most important destinations within Stann Creek are:

- Placencia - a world-renowned tourism destination; this town is the most important sun and beach destination in the country,
- Dangriga - a town that serves as a gateway for expeditions to the southern area of Belize's Barrier Reef but still needs to work on becoming a mature destination by itself. Dangriga is widely considered the spiritual capital of the Garifuna people, which is another attraction for tourists seeking to immerse themselves in the local cuisine and traditions.
- Hopkins Village – a town that provides a more cost-effective beach destination option than Placencia. In addition to Dangriga, Hopkins offers visitors the opportunity to explore the nearby nature reserves, such as the Barrier Reef and the Cockscomb Basin Wildlife Sanctuary, as well as cultural attractions, such as the Lebeha Drumming Center and the Pen Cayetano Studio Gallery where Garifuna art and music are showcased.

The tourism sector in Stann Creek District faces several challenges, including seasonality, lack of skilled workers, poor infrastructure, weak local destination brands in the municipalities (except for Placencia), and limited diversification of tourism products.

Tourism in Toledo District

Toledo is recognized as one of the less developed areas in the country. Despite this, tourism has emerged as a vital service in the district, employing over 1,200 individuals (SIB 2018). The number of hotels and available rooms remains low but growing, representing only 3 per cent of the country's total (BTB 2017).

The district's vast protected areas and wildlife offer abundant opportunities for visitors interested in nature-based activities. In terms of cultural tourism, the inland hills of Toledo boast several ancient Maya sites. Furthermore, due to the high proportion of the Mayan population in the area, visitors can engage with local communities and immerse themselves in their traditions. Ago-tourism activities, particularly cacao-related activities, are increasingly popular in Toledo.

Opportunities

Belize has excellent potential for further growth in its tourism activity through MSME development. The most relevant opportunities identified include the following:

- Increase demand for sustainable tourism, including meals, accommodation, activities, and souvenirs.
- Increase awareness of social sustainability.
- The availability of natural attractions for sustainable tourism and a rich historical background provides a unique experience for visitors.

- ▶ Increase in demand for special interest tourism in areas such as bird watching, hiking, archeology, and scuba diving.
- ▶ To develop unique wellness services. Mayan heritage includes traditional curing techniques such as herbalism, traditional healing, or chiropractic.
- ▶ Access to new markets with online distribution platforms.

Market constraints

Some of the main challenges the country needs to overcome to achieve the expected growth include:

- ▶ Need for integration of local communities into the Tourism Value Chain.
- ▶ Lack of resilience towards natural disasters and other economic risks, including limited use of insurance in MSMEs, the vulnerability of roads and infrastructure, and limited access to capital.
- ▶ Dependence on fossil fuel transportation.
- ▶ Low participation of other economic activities (such as agriculture or local manufacturing) in tourism.
- ▶ Lack of regularization in "platform-based tours and experiences" resulting in informal work.
- ▶ Lack of knowledge and resources to compete in digital platforms.
- ▶ Insufficient hospitality-related training.
- ▶ Limited access of MSMEs to business development service (BDS) providers.

Recommendations

- ▶ Enhance Belize Tourism Board (BTB) capacity to develop skills for tourism workers and MSMEs.
- ▶ Strengthen the resilience of tourism MSMEs by identifying main gaps and vulnerabilities and working with BDS providers.
- ▶ Professionalize the management skills of the owners of MSMEs and entrepreneurs in the sustainable tourism sector.
- ▶ Professionalize digital skills in MSMEs and BDS providers, with emphasis on the use of social networks and digital channels specialized in tourism.
- ▶ Establish a standard recognition programme on sustainability for sustainable businesses.
- ▶ Articulate with external parties to develop special interests and value-added services.
- ▶ Promote entrepreneurship in Belizean-made handicrafts based on upcycling or recycling materials.
- ▶ Strengthen the capacity of local indigenous communities to develop wellness and agro-tourism products.
- ▶ Develop standards and protocols to prevent cultural appropriation in tourism activities and communications involving indigenous groups is critical to promote responsible and respectful tourism practices.

- Promote the creation of cooperatives in the sector by strengthening the capacities of Government institutions and BDS providers.

Processing dried and dehydrated food

This sector has undergone a period of rapid expansion within the last decade. The adoption of healthier lifestyles among consumers, particularly in developed countries, has increased their awareness of nutrition and subsequently led to an upsurge in the consumption of nutrient-dense foods and healthy snacks on a global scale. While Belize has been minimally involved in the global trade of dried food, the country boasts of advantageous environmental and market conditions that present the potential to establish its significance in the tropical dried fruits sector and dried seaweed, particularly in the district of Stann Creek, given the local agricultural and fishing production. The district is home to 997 farms and around 1007 farmers. Most of these farms consist of banana, citrus and Mangoes and aquaculture, including seaweed.

Tropical dried fruits

Although this sector's current level of activity is still in its early stages, the Government of Belize (GOB) has developed a strategic vision to facilitate the growth and success of the rural-based agro-processing MSMEs.

The European Union (EU) constitutes the most extensive prospective market for dried fruit export, with an estimated import volume of 25-30 thousand tons of dried tropical fruits. Dried mangoes account for approximately 40 per cent of total dried tropical fruit imports to Europe. Over the medium-to-long term, a stable growth rate of 5-6 per cent in volume per year is anticipated for the European, dried tropical fruit market. (CBI 2021). The United Kingdom (UK) is Europe's leading importer of tropical dried fruit, with an estimated consumption of 5,000 tons (CBI 2021).

The blue economy

At a global level, the dried seaweed market size was worth around US\$14,000 million in 2021 and is predicted to grow at a compound annual growth rate of 9.10 per cent between 2022 and 2030 (ZMR 2023). This substantial growth trajectory positions seaweed as one of the most promising products within the seafood industry. Belize's coastal geography and favourable environmental attributes make it an excellent site for cultivating and drying seaweed. In addition, the #planBelize Medium-Term Development Strategy 2022-2026 outlines project development of new industries in the marine and coastal areas (i.e., seaweed, fish processing, and others)

The United States (US) is a major importer of seaweed, with imports exceeding US\$95 million in 2019 alone. While most of these imports come from countries like Korea and China, Belize has a unique advantage due to its proximity to the US market. The UK serves as Europe's primary importer of seaweed.

Opportunities

Belize has great potential to develop this new sector through MSME development. The most relevant opportunities identified include the following:

- This sector has rapidly expanded within the last decade associated with adopting healthier lifestyles among consumers.
- The country boasts of advantageous environmental and market conditions. Belize has entered into several trade agreements, such as the Caribbean Community and Common Market (CARICOM) and Central America, thus enabling its entry into both regional and international markets.

- ▶ Existing support infrastructure in the Central Farm Agro-Processing Unit (CFAPU), which provides training and technical assistance to MSMEs in the areas of food safety and quality, labelling and packaging of products, quality control checks, and laboratory tests.
- ▶ The country has the potential to offer several competitive advantages when compared with primary suppliers to the US and UK. These advantages include its proximity (in contrast with other producers such as China or Korea) and the trading benefits that arise from being a member of the Commonwealth of Nations.
- ▶ The promotion of this activity carries environmental benefits. Fruits that are typically unsuitable for export can be used as raw materials due to their physical appearance. Furthermore, the conventional drying methods used in this industry generate relatively low carbon emissions.
- ▶ The initial cost for business tends to be low; equipment can be manually crafted, and small operations can be started with minimum investment and progressively increase their capacity by adopting new technology and drying methods.
- ▶ In addition to local Government organizations, international agencies such as the Centre for the Promotion of Imports from Developing Countries (CBI) to the European Union and the Department for International Trade (DIT) for the United Kingdom provide BDS focusing on access to potential export markets.

Market constraints

Some of the main challenges the country needs to overcome to achieve the expected growth include:

- ▶ Lack of knowledge on processing dried fruits. Although the CFAPU has a history of drying agricultural products, the focus has been on producing tuber flours for local consumption.
- ▶ Costs of compliance with trade and sanitary regulations. Some of the associated costs may be prohibitively expensive. For instance, laboratory testing of the products or certification of the packaging facility can be restrictive for such entities.
- ▶ Limited offer of BDS to agricultural MSMEs.
- ▶ Cooperatives represent a viable option for incorporating diverse producers into a self-sustaining business framework. However, despite some successful cases, this business model has yet to gain significant traction in rural areas of Belize.
- ▶ There are limited affordable and accessible credit and financing for MSMEs in the agro-processing sector.

Recommendations

- ▶ Strengthen the capacities of the CFAPU on processing of dried and dehydrated fruits.
- ▶ Professionalize the management skills of the owners of MSMEs and entrepreneurs in the agro-processing sector.
- ▶ Promote the creation of cooperatives of production in the sector.
- ▶ Develop credit schemes with conditions adjusted to the economic cycles of the sector and the needs of MSMEs.

- Promote financing through corporate social responsibility and supplier development programmes for UK and EU importers.
- Promote international investment in agro-processing by developing investment guides with specific business plans on drying tropical fruits.
- Engage with cooperation agencies in the importer countries including the UK, the German Agency for International Cooperation (GIZ), or EU to seek funding for MSME development in agro-processing.
- Explore the creation of a national brand for tropical dehydrated fruits.
- Develop central purchase agreements with suppliers of agro-processors.
- Incentivize the participation of vulnerable populations in the sector by improving their access to BDS and setting specific targets on women, youth and indigenous representation in training initiatives.



1. Introduction

The Joint SDG Fund Programme: Building a resilient Belize through universal, adaptive, and sustainable social protection, in line with Horizon 2030: National Development Framework for Belize 2010-2030, seeks to help the country to recover from the devastating impact of the pandemic, particularly on vulnerable groups such as women, microentrepreneurs and rural population. The main results of the Joint Programme (JP) are centred on two interconnected outcomes, both of which are articulated in Horizon 2030: National Development Framework for Belize 2010-2030 and the Government's #planBelize Medium-Term Development Strategy priority areas: poverty reduction and economic growth.

Amongst others, the JP aims to improve the environment for micro, small, and medium-sized enterprises (MSMEs), to enable their growth, reduce their vulnerability to shocks, and guarantee access to male and female entrepreneurs whose incomes and livelihoods were further devastated by COVID-19. The Government of Belize (GOB), in its Horizon 2030: National Development Framework for Belize 2010-2030, has specifically emphasized the recovery and empowerment of MSMEs.

MSMEs are a vital component of Belize's economy, accounting for over 90 per cent of the country's enterprises and creating over 60 per cent of the employment opportunities. The COVID-19 pandemic has further expanded the MSME sector in Belize as more people turned to entrepreneurship to offset the loss of formal employment opportunities in the country's economy. However, the high incidence of MSMEs in the economy also brings challenges, particularly their low productivity, high informality, and short lifespan.

To support the efforts of the Belizean Government to reactivate the country's economy, the ILO Decent Work Team and Office for the Caribbean has produced this report as an initial stage of a larger project aimed at:

- ▶ Identifying economic value chains with the potential to generate sustainable entrepreneurship and new jobs, with particular attention to the economic integration of vulnerable groups.
- ▶ To present jointly agreed upon pathways of innovative actions towards integration of farmers and small-scale entrepreneurs in these value chains.
- ▶ To present a plan to support prioritized municipalities to generate a local inclusive economic environment to support entrepreneurs within these value chains.
- ▶ To present a plan to support BDS providers in generating relevant and adequate content based on their situational analysis and gap analysis of current BDS services.

This report will focus on the first of those objectives by identifying economic value chains that offer the most significant opportunities for the creation of decent jobs and sustainable enterprises in Belize, with a focus on vulnerable populations (women, youth, and indigenous communities). It will then make recommendations for interventions to support them in accessing decent economic and employment opportunities.

This report is made up of three components:

1. A context analysis describing the economic landscape, labour market conditions, and main socioeconomic characteristics of the defined target groups (women, youth, and indigenous population).
2. A selection of subsectors and value chains with strong potential to create inclusive growth and employment opportunities for selected target groups in Belize.
3. An identification of critical constraints within these value chains and their broader market systems to explore the underlying root causes and propose intervention recommendations.

Methodology

This study was carried out following the MSD methodology developed by the ILO² Enterprises Department (ILO 2021). This methodology aims to address the root cause of reasons why a particular constraint exists – and not just to treat its symptoms. Put another way, it means looking beyond the immediately visible tip of the iceberg to understand what lies beneath, the issues that create the problem in the first place.

The MSD does not prescribe a set of 'blueprint' interventions or a menu of policy prescriptions. Instead, it is an approach: a suite of principles and practices to help understand systems of exchange and to guide practical interventions that can lead to positive social, economic, and environmental outcomes. The three central features of this methodology are:

1. **Analysis-led.** Undertaking a thorough analysis of how and why systems function
2. **Intervention through facilitation.** Catalyzing desired behaviour changes that build on genuine incentives and capabilities of local market actors to succeed in the long term.
3. **Embracing adaptive management.** Outcomes are complex and predictable, so finding viable pathways to systemic change requires time, curiosity, and experimentation. This means deploying flexible and more iterative 'trial and error' implementation alongside a commitment to ongoing measurement and learning.

The application of this approach offers a structured framework for identifying value chains² that is capable of fostering economic growth, job creation, and poverty reduction. Furthermore, it enables the identification of constraints and opportunities that may impact value chain performance. The ultimate objective is to develop and implement effective interventions that address these identified constraints, thereby enhancing outcomes. As a result, this approach aims to reduce underemployment and unemployment rates, improve productivity within the business ecosystem, and contribute to the advancement of SDG8 (decent work and economic growth).

The general structure of this methodology is composed of:

► Context analysis

The research team developed a comprehensive desk review and all secondary data sources, including Government public information, reports published by UN agencies, academic journals, national legislation, policy documents, newspaper archives, and national data sets. In addition, Interviews were conducted with key informants (for a detailed list of institutions interviewed, go to Appendix 1, including Government officials, academia representatives, business owners, and workers).

² A value chain “describes the full range of activities that are required to bring a product or service from conception, through the intermediary phases of production and delivery to final consumers, and final disposal after use” This includes activities such as design, production, marketing, distribution and support services up to the final consumer (Kaplinsky 2012).

▶ **Sector selection**

Six economic sectors³ were identified based on their relevance in the Belizean economy and labour market; those sectors were furtherly assessed to prioritize a more profound analysis in two value chains (sustainable tourism and processing of dried and dehydrated food). The criteria used to perform this assessment are a) potential for employment creation, b) relevance for the target groups, and c) feasibility for intervention.

▶ **Value chain analysis**

Once the prioritized sectors were selected, they were analysed from a market system perspective. The process included a market overview with a focus on the labour market; mapping of the actors and activities through the value chain; analysis of the supporting functions (such as access to market, access to training and finance); as well as regulations to identify the most critical opportunities and market constraints.

▶ **Recommendations of interventions**

Based on both the value chain analysis and the analysis of the target groups, some recommendations will be proposed, including the process, relevant actors involved in the intervention, and expected outputs.

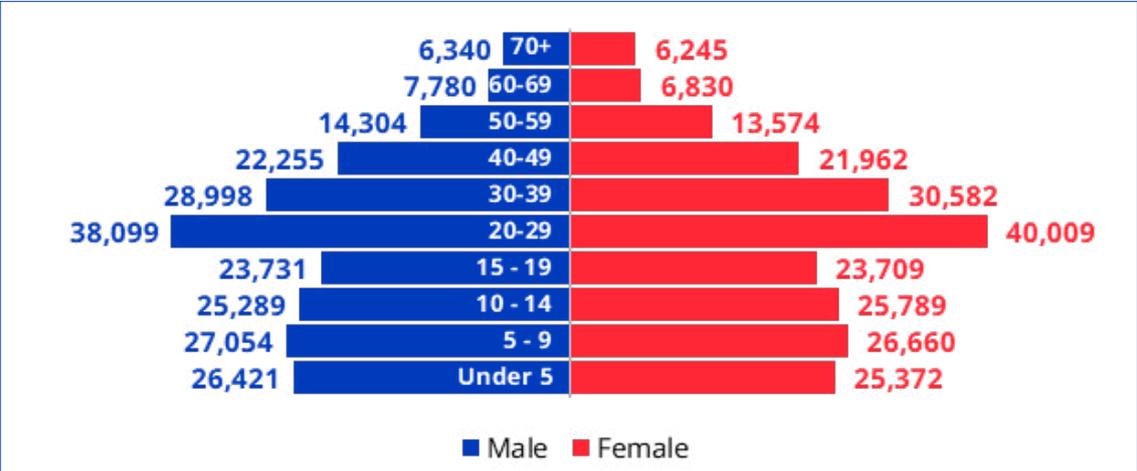
³ Organic cocoa, coconut, manufacturing of cooked pork meats, processing of dried and dehydrated food, sustainable tourism, business process outsourcing, and renewable energy



2. Context

Neighbouring Guatemala and Mexico, Belize is regarded as a middle-income⁴ developing country. The Belizean population is diverse. Of the 441,470 inhabitants of the country (SIB 2023), approximately 50 per cent are women, and 64 per cent are below 30 years old.

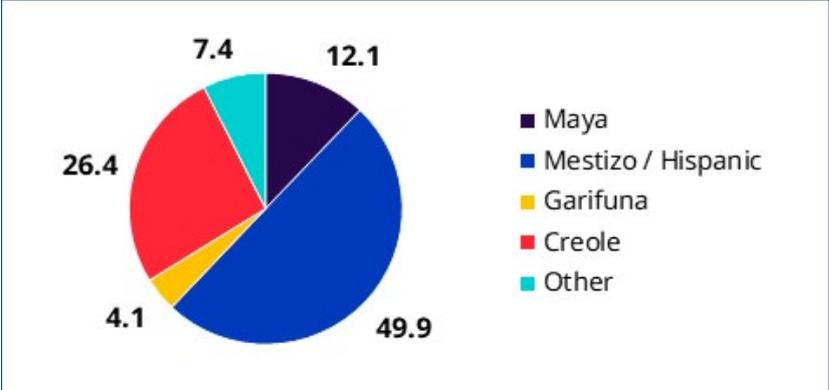
► Graph 1. Population by age and gender



Source: Author’s own elaboration based on postcensal estimates (SIB 2023)

The population is also culturally diverse: 42.3 per cent self-described as members of a specific ethnic group, 49.9 per cent as Mestizo / Hispanic, 26.4 per cent as Creole, 12.2 per cent as Mayans, and 4.1 per cent as Garifuna.

► Graph 2. Share of the population by ethnicity (%)



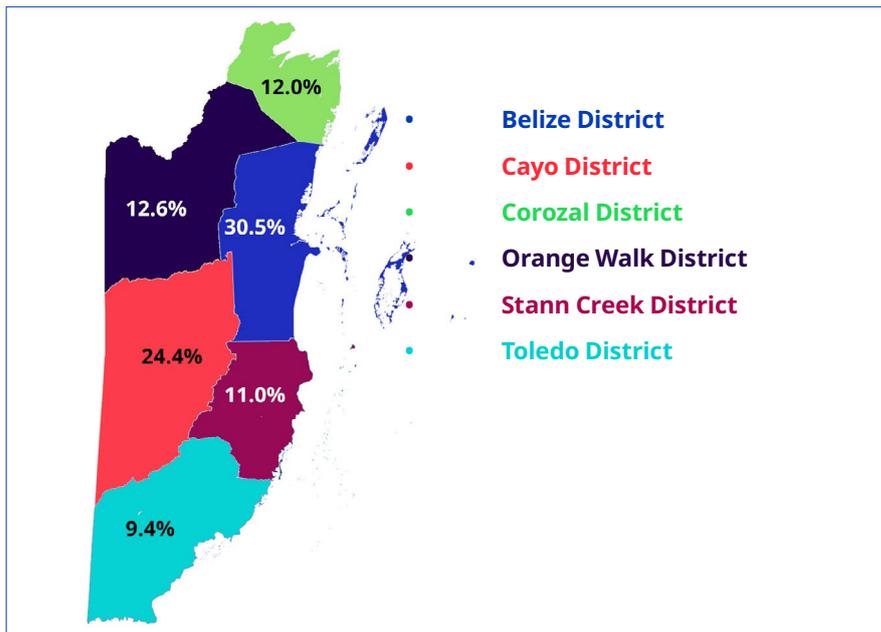
Source: MPI Study (SIB 2021)

⁴ Middle income countries are defined as those with a gross national income per capita between \$1,036 \$12,535 by 2021. (World Bank 2021).

Belize is geographically partitioned into six districts; the two most populous districts account for 55 per cent of Belize’s total population. They are Belize District (30.5 per cent), which houses the country’s largest city, Belize City, and Cayo District (24.4 per cent), which hosts Belmopan. Together, they account for approximately 55 per cent of Belize’s total population.

The remaining four districts, namely Corozal (12 per cent), Orange Walk (12.6 per cent), Stann Creek (11 per cent), and Toledo (9.4 per cent), contribute to the remaining population share, ranging between 9 to 12 per cent for each district.

► **Graph 3. Share of population by district**



Source: Author’s own elaboration based on (SIB 2023)

Each district is headed by an elected district council composed of councilors representing specific areas within the district. Each district includes towns and smaller settlements with their own local Government bodies, such as town councils and village councils. Town councils manage and provide services to urban areas, while village councils handle local affairs in rural communities.

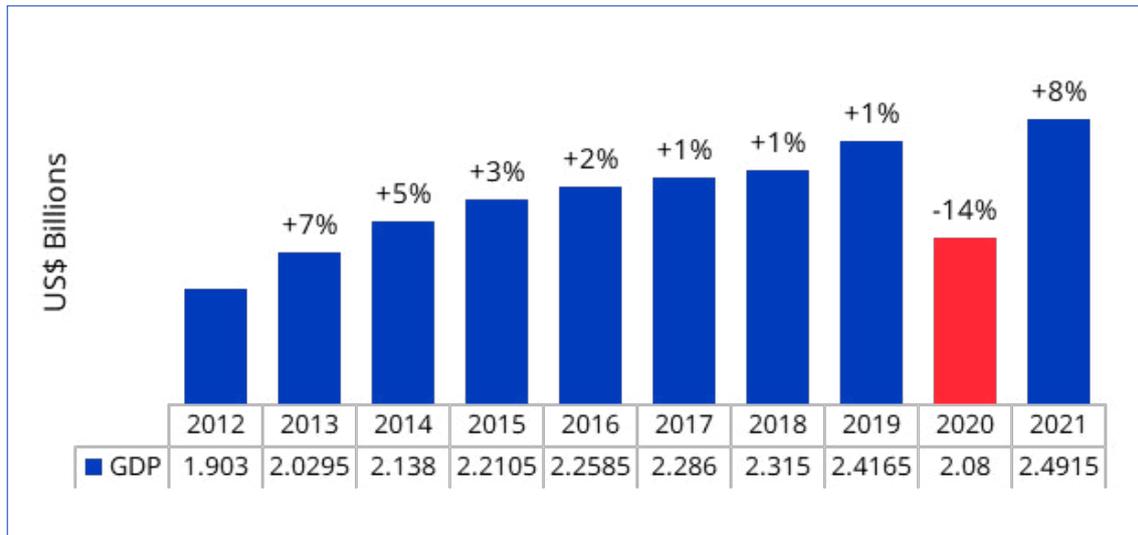
Economic backdrop

Before 2020, Belize’s economy experienced moderate growth for over a decade⁵. However, the COVID-19 pandemic severely impacted Belize’s economic performance, leading to a 14 per cent contraction in gross domestic product (GDP) and an increase in public debt to an unsustainable level of 133 per cent of GDP.

By 2021 economic activity showed an accelerated recovery achieving a record figure of US\$2.5 billion; in the third quarter of 2022, GDP increased by 12.8 per cent, fueled by tourism which has seen both overnight and cruise arrivals now exceeding their pre-pandemic levels.

5 Average growth of 3 per cent between 2012 and 2019.

► **Graph 4. Historic GDP (current US\$ billions)**



Source: Author’s own elaboration based on (World Bank 2022)

Also, by 2021 Gross Domestic Product (GDP) per capita in Belize reached US\$6,228, which is lower than US\$7,026, the average GDP per capita in the Central American Integration System (SICA)⁶ and substantially lower than US\$11,246, the average GDP per capita in CARICOM countries (World Bank 2022).

Belize is substantially dependent on tourism and agriculture as primary sources of foreign exchange. Some of the most important crops in the agriculture sector are substantially dependent on migrant workers sourced from neighbouring republics. Remittance inflows, which account for about 5 per cent of GDP, are another primary foreign exchange source. Merchandise exports in 2022 were US\$458 million, while imports were US\$1,041million. The country has partial scope trading agreements with its neighbouring countries, Mexico and Guatemala. Belize maintains a fixed exchange rate of US\$1.00 to BZ\$2.00. The rate has been fixed since 1976. Tertiary activities⁷ contribute near to 40 per cent of the Belizean GDP, more than 50 per cent of total employment, and 71.4 per cent of establishments in the country.

6 Due to its location and history, Belize is a member of two regional trading blocs - the Caribbean Community and Common Market (CARICOM) and the Central American Integration System (SICA).

7 Wholesale and retail trade, accommodation and food service activities, real estate, public administration, education, transportation, human health and social work activities, financial and insurance activities, including accommodation and food service activities, wholesale and retail trade, Government activities, real estate, business and administrative activities and financial and insurance activities and outsourcing business processes.

► **Table 1. Sectors by the proportion of GDP, total employment participation, and economic establishments**

Sector	Economic information		
	Participation in GDP (2021)	Participation in total employment (2022)	Economic establishments ⁸ (2020)
Agriculture, forestry, and fishing	7.7%	21.2%	14%
Wholesale and retail trade	13.4%	18.2%	18.3%
Manufacturing	6.8%	9.9%	6.8%
Accommodation and food service activities	4.2%	8.8%	15.6%
Construction	6.0%	7.7%	6.7%
Real estate; business and administrative activities	11.1%	6.2%	1.1%
Public administration and defense	6.9%	5.7%	0.1%
Education	5.3%	5.0%	0.9%
Transportation	3.6%	2.5%	3.3%
Human health and social work activities	2.0%	2.2%	1.8%
Financial and insurance activities	8.2%	2.1%	1.2%
Electricity	2.6%	1.0%	0.3%
Mining	1.3%	0.4%	0.2%
Others	7.1%	9.1%	14.8%
Taxes and subsidies	13.7%	NA	NA

Source: Author's own elaboration based on annual GDP by activity (SIB 2023), Labour Force Survey (SIB 2022), and Business Establishment Survey (SIB 2020).

While the Belize economy has partially recovered from the COVID-19 pandemic impact, some economic risks should be addressed. As a net importer of oil and gas, Belize is vulnerable to fluctuations in energy prices. The country is also affected by the global food crisis and the continued fallout from the war in Ukraine¹⁰, as well as soaring freight costs occasioned by supply chain disruptions. Inflation in January 2023 was measured at 6.6 per cent (SIB 2023), with food being the single most significant contributor to rising prices. Inflation has been particularly relevant for some ethnic groups where income tends to be lower, and poverty incidence tends to be higher in the Mayan population than in any other ethnic group.

⁸ 14.9 per cent of the economic establishments not included in this table account for "activities of households as employers."

⁹ Belize has implemented the International Standard Industrial Classification of All Economic Activities (ISIC) as the framework for its economic reporting. The ISIC classification system does not explicitly designate tourism as a distinct category. Instead, tourism-related activities are distributed among various sectors based on primary focus. These sectors may include accommodation, retail trade, and transportation. As a result, obtaining precise figures regarding the tourism sector's contribution to Belize's economy and employment becomes challenging. To address this limitation and obtain more accurate insights into the tourism sector's economic impact, the Government of Belize is actively pursuing the establishment of a tourism satellite account. Latest estimations suggest that tourism represents 21.3 per cent of total GDP and 13 per cent of total employment (Ministry of Tourism 2017).

¹⁰ Further increases in food and fuel prices due to Russia's invasion of Ukraine could exacerbate imported inflation, widening the current account deficit and reducing international reserve buffers (IMF 2023).

► **Table 2. Incidence and intensity of poverty by ethnicity**

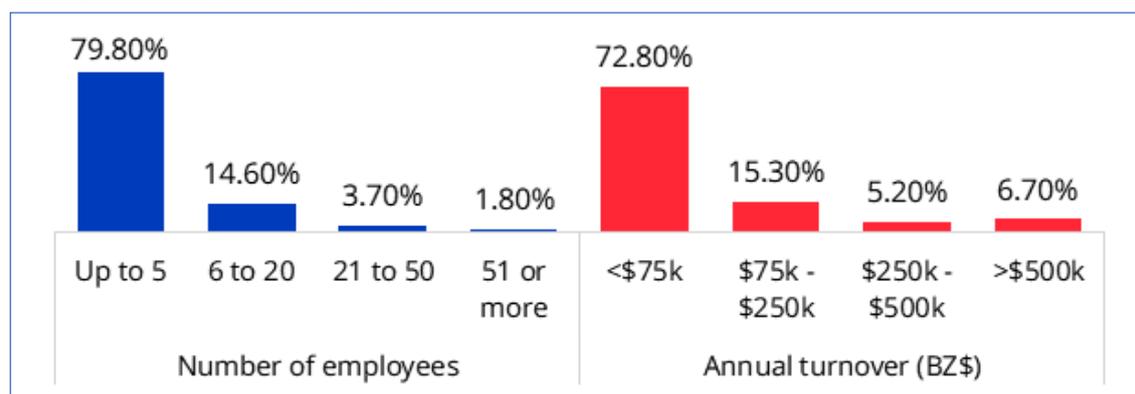
Ethnicity	MPI	Incidence ¹¹ (%)	Intensity ¹² (%)
Maya	0.273	61.7	44.6
Mestizo / Hispanic	0.136	35.7	38.1
Garifuna	0.083	24.3	34
Creole	0.081	23	35.5
Other	0.176	45.6	38.6
National	0.139	35.7	39

Source: Multidimensional Poverty Index (MPI) Study (SIB 2021)

Business environment

Belize boasts a considerable presence of MSMEs¹³, accounting for approximately 90 per cent of the country's enterprises (Micro enterprises account for more than 70 per cent). These businesses play a vital role in the private sector, generating around 50 per cent of the country's jobs (UNDP, BELTRAIDE 2022). In addition, MSMEs account for over 70 per cent of main export crops and an even higher proportion of domestic food crops and lead in some manufacturing subsectors such as wood products, garments, and handicraft items. In addition, MSMEs are the main ones responsible for providing local transportation and tour guide services for tourism (BELTRAIDE 2012).

► **Graph 5. Enterprises by employee headcount and annual turnover**



Source: National MSMEs Strategy and Roadmap for Belize (UNDP, BELTRAIDE 2022)

11 Refers to what per cent of the population is multidimensionally poor according to the (SIB 2021).

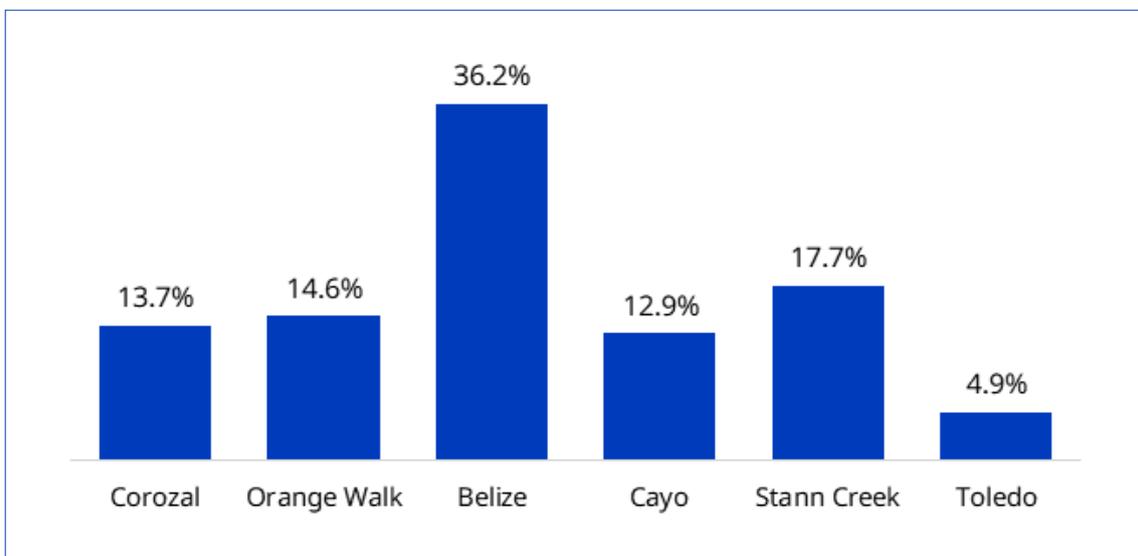
12 Refers to what per cent of the 17 indicators included in the MPI poor households were deprived in (SIB 2021).

13 In the Belizean context, MSMEs are categorized based on specific criteria related to employee count and annual turnover. Micro-enterprises have fewer than five employees and an annual turnover below BZ\$100,000. Small enterprises encompass businesses with a headcount exceeding five but not exceeding 20 employees, with an annual turnover ranging from over BZ\$100,000 to below BZ\$500,000. Medium enterprises are characterized by a headcount ranging from 21 to 51 employees and an annual turnover between BZ\$500,000 and BZ\$45.5 million. The indicator that identifies a company in a larger size category of enterprises will determine whether an enterprise is micro, small, or medium size.

Although there is relatively equal representation of men and women in MSME ownership, a notable disparity exists in ownership across different company sizes. The findings derived from the Socioeconomic Impact Assessment (SEIA) conducted within the framework of the National MSMEs Strategy indicate that while women constitute most owners in the micro-enterprise segment (55.2 per cent), men predominantly own small and medium-sized enterprises (SMEs), accounting for 67.6 per cent and 66.7 per cent, respectively. Furthermore, there needs to be more representation of youth MSME owners. The average age of MSME owners is 39.4 years, with no significant variations based on gender (UNDP, BELTRAIDE 2022).

Belize District gathers 36.2 per cent of the country's economic activity, followed by Stann Creek (17.7 per cent), mainly driven by tourism.

► **Graph 6. Distribution of establishments by district**



Source: Business Establishment Survey (SIB 2020)

The COVID-19 pandemic has presented significant economic challenges for MSMEs in Belize, resulting in their struggle to maintain financial sustainability. According to the findings of the SEIA (UNDP, BELTRAIDE 2022), 44 per cent of firms experienced a decline in revenues exceeding 50 per cent as a direct consequence of the pandemic. Moreover, 59 per cent of these firms encountered liquidity issues, and 52 per cent were compelled to reduce their workforce.

The impact of the pandemic on business deeply impacted MSMEs due to its significant prevalence of informality. The current state of business laws, regulations, tax policy, and access to finance encourages businesses and entrepreneurs to operate informally. Informal output in Belize is estimated at 40 per cent (Ohnsorge and Shu 2021) of GDP. MSMEs will likely do business under a registered trade name, but tax compliance varies across enterprise types. Notably, most micro enterprises (57.2 per cent) are not registered for corporate tax (UNDP, BELTRAIDE 2022).

The results from the business climate assessment were conducted as a component of the national strategy for MSMEs (UNDP, BELTRAIDE 2022) show that there is a special need for coordination among crucial Government ministries and enterprise development agencies. Furthermore, many processes still rely on manual form filling and submission of original documents. As per the Doing Business Report findings, Belize currently occupies the 166th position out of 190 countries regarding the ease of starting a business (World Bank 2020).

The Doing Business Report (World Bank 2020) ranks Belize in the 173rd position out of 190 countries regarding the ease of obtaining credit. Despite the Belizean financial system exhibiting significant liquidity, with excess statutory liquidity of over US\$744.8 million (Central Bank of Belize 2023), access to

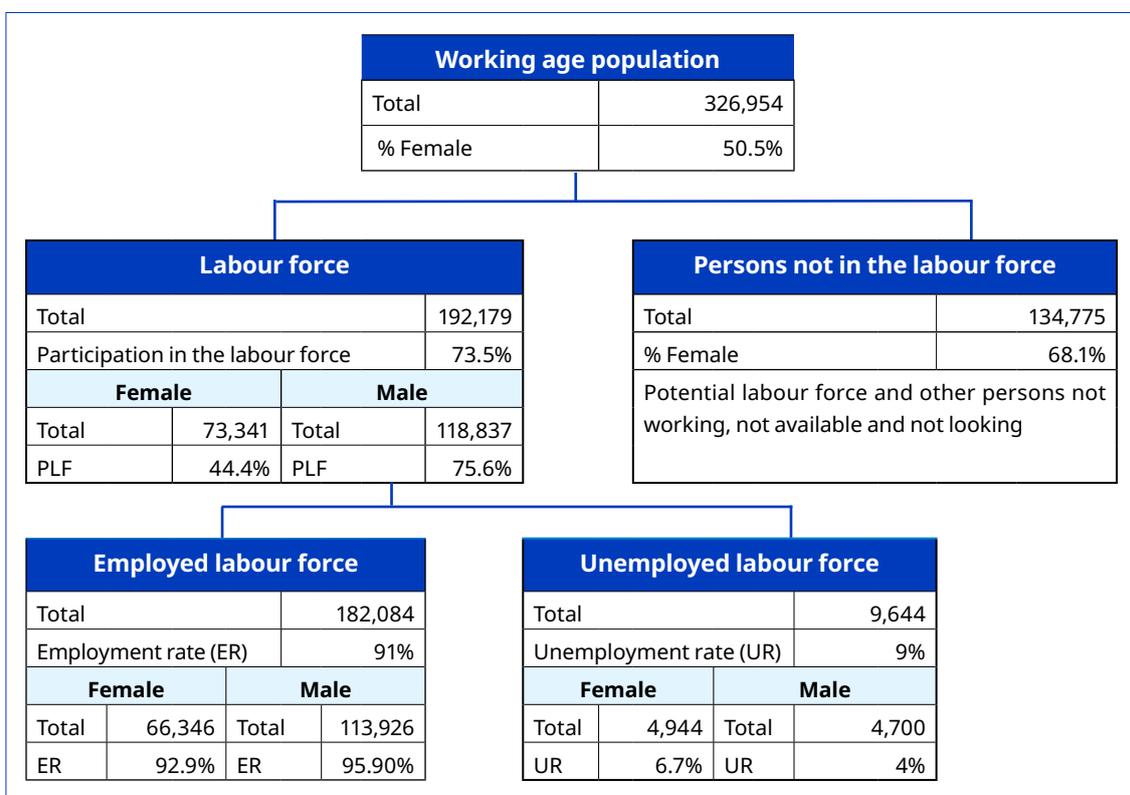
finance remains a crucial challenge for developing MSMEs. The financial landscape in Belize is primarily dominated by banks, offering limited financing options for MSMEs and aspiring entrepreneurs. Business loans are available but come with high-interest rates, and the collateral requirements often exceed the loan value (Compete Caribbean 2014).

A lack of current credit information further complicates matters, making it difficult for lenders to assess risks accurately, resulting in a greater aversion to lending. This risk-averse environment disproportionately affects MSMEs and small borrowers, potentially leading to a higher reliance on substantial collateral. Furthermore, Belize lacks a collateral registry enabling the registration of movable and immovable assets as loan security. Lending institutions primarily rely on fixed assets as collateral, thereby creating obstacles, particularly women and youth entrepreneurs, in accessing financing. This preference for fixed asset collateralization also exposes MSMEs and small businesses to heightened vulnerability in the face of unforeseen business shocks.

Labour market

Belize's working-age population begins at 14, comprising 326,954 individuals (50 per cent women). Data from the Labour Force Survey for October 2022 (SIB 2022) reveal a labour force participation rate of 73.5 per cent, with employment reaching 92.9 per cent. However, the labour market in Belize exhibits gender disparities. The participation rate of males stands at 75.6 per cent, significantly higher than that of females, at 44.4 per cent¹⁴. Moreover, the proportion of women outside the labour force is disproportionately higher, reaching 68.1 per cent.

► Figure 1. Labour force framework

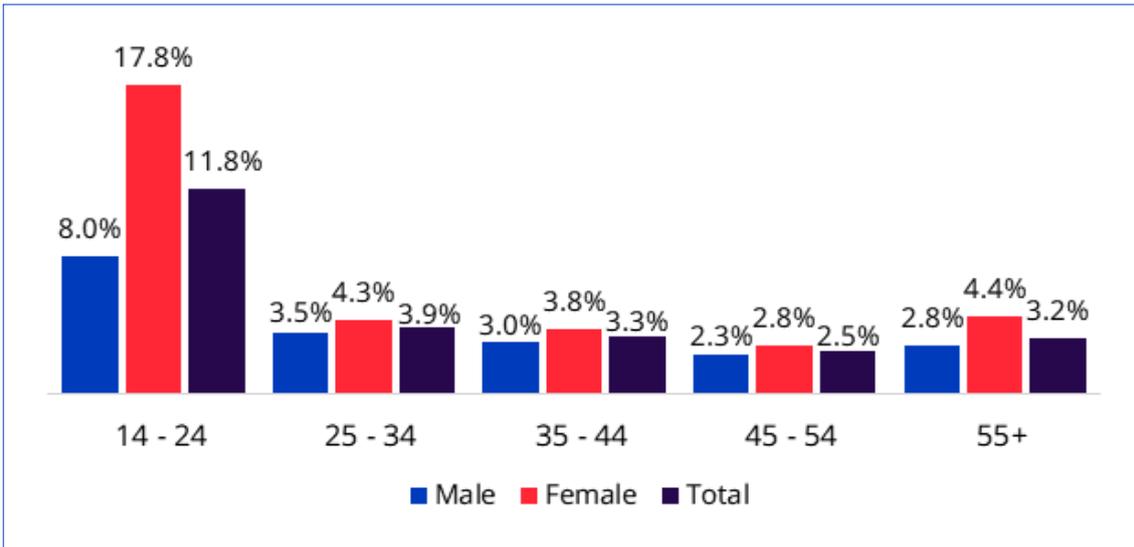


Source: Labour Force Survey (SIB 2022)

14 Women comprised 62 per cent of the total number of unemployed persons losing their job due to COVID-19 (SIB 2021).

The unemployment rate also exhibits gender disparities; unemployment for women reached 6.7 per cent compared to 4 per cent for male workers (SIB 2022). This behaviour is consistent among all ages but intensifies in the age group of 14-24, where the unemployment rate reaches 11.8 per cent for the total population (more than 5 percentage points higher than general unemployment), 8 per cent for men, and 11.8 per cent for women. These rates underscore the notable gender gaps in labour force participation and highlight the need for attention to promote young employment for both men and women.

► **Graph 7. Unemployment by gender and age group**



Source: Labour Force Survey (SIB 2022)

In addition, there are substantial variations among ethnic groups, with indigenous groups experiencing the highest rates of joblessness. Unemployment is above national averages, particularly for Garifuna population and Maya women.

► **Table 3. Unemployment by gender and ethnic group**

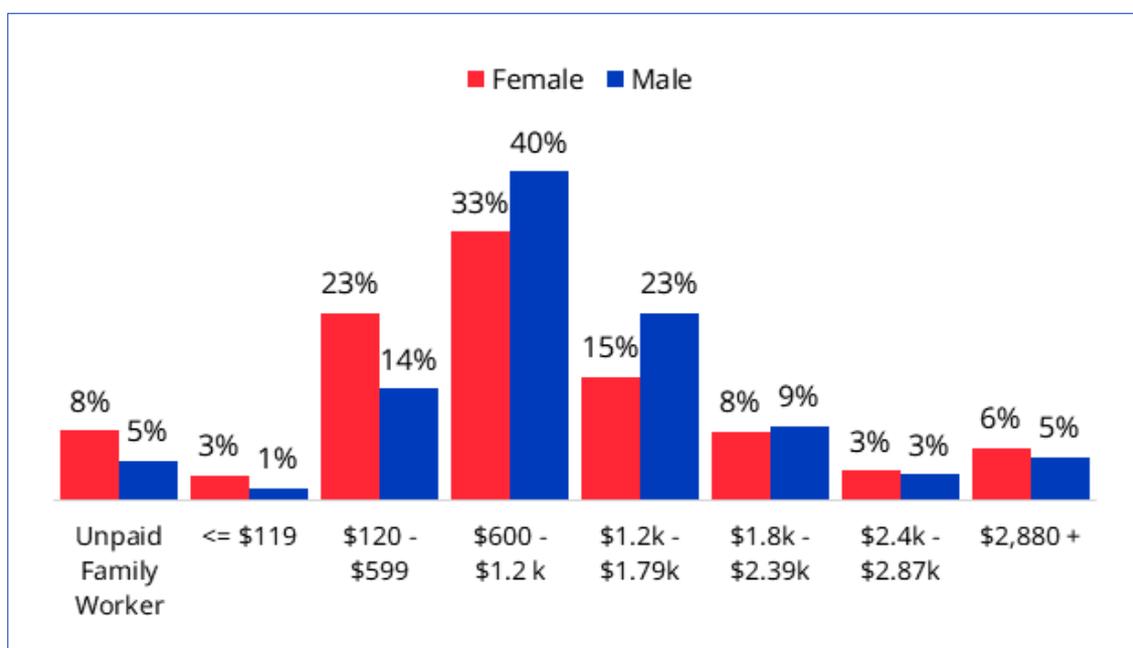
Ethnic group	Male	Female	Total unemployment rate by ethnic group
Creole	6.6%	7.5%	7.0%
Garifuna	13.5%	9.8%	11.7%
Maya	2.6%	8.4%	4.5%
Mestizo / Hispanic	2.6%	5.9%	3.8%
Other	3.7%	5.8%	4.3%
Don't know / Not stated	0.0%	0.0%	0.0%
Total unemployment rate by population	4.0%	6.8%	5.0%

Source: Labour Force Survey (SIB 2022)

On average, women in Belize earn approximately 7 per cent less than men, with women's average income amounting to BZ\$900 compared to men's average income of BZ\$1,020. Furthermore, women tend to be overrepresented in unpaid or lower-wage positions, specifically those earning less than BZ\$600. Men exhibit a significantly higher participation rate in the income groups ranging from BZ\$600 to BZ\$1,790.

However, regarding higher income brackets above BZ\$1,800, the gender disparity diminishes when considering the proportion of women's participation in the labour force.

► **Graph 8. Proportion of employment by income group concerning gender**



Source: Labour Force Survey (SIB 2021)

Another characteristic of the Belizean market is that 13 per cent of the labour force has no formal education, and an additional 35 per cent has only a primary education as its highest formal educational achievement. When separating educational attainment by gender, only at the tertiary level are females more qualified than males.

► **Table 4. Proportion of employment by education level**

Highest level of education completed	Male	Female	Total employment rate by education level
None	13.6 %	11.3 %	12.7 %
Primary	41.0 %	27.6 %	35.9 %
Secondary	25.2 %	28.8 %	26.6 %
Tertiary	17.2 %	30.9 %	22.4 %
Other	1.6 %	0.9 %	1.3 %
Don't know/not stated	1.5 %	0.6 %	1.2 %

Source: Labour Force Survey (SIB 2021)

Belize's comprehensive national skills development strategy must be more coordinated and cohesive in fostering human capital. Although the ITVET system is recognized, a significant gap exists in having a clear and well-designed plan to identify areas of projected vocational growth that can facilitate seamless integration into the labour market. Additionally, Belize needs a national apprenticeship programme that effectively links students and graduates with prospective employers. As a result, apprenticeships are obtained ad-hoc without a structured framework (UNDP, BELTRAIDE 2022).



3. Identification of high-potential sectors and value chains

The approach used for identifying those economic value chains that offer the most significant opportunities for the creation of decent jobs and sustainable enterprises in Belize was based on three steps: 1) prioritization of sectors based on economic performance; 2) analysis of relevance for #planBelize Medium-Term Development Strategy 2022-2026; and 3) selection of subsectors.

I. Prioritization of sectors based on economic performance

All economic sectors were analyzed based on the size of the market (participation rate of the sector of total GDP) and employment potential (participation of total employment); this resulted in a shortlist of 6 sectors: 1) agriculture, forestry, and fishing; 2) wholesale and retail trade; 3) manufacturing; 4) accommodation and food service activities; 5) construction; and 6) real estate, business, and administrative activities.

► **Table 5. Sectors¹⁵ by the proportion of GDP and total employment participation**

Sector	Economic information	
	Participation of GDP	Participation in total employment
Agriculture, forestry, and fishing	7.7%	21.2%
Wholesale and retail trade	13.4%	18.2%
Manufacturing	6.8%	9.9%
Accommodation and food service activities	4.2%	8.8%
Construction	6.0%	7.7%
Real estate; business and administrative activities	11.1%	6.2%
Public administration and defense	6.9%	5.7%
Education	5.3%	5.0%
Transportation	3.6%	2.5%
Human health and social work activities	2.0%	2.2%
Financial and insurance activities	8.2%	2.1%
Electricity	2.6%	1.0%
Mining	1.3%	0.4%
Others	7.1%	9.1%
Taxes and Subsidies	13.7%	NA

Source: Author's own elaboration based on annual GDP by activity (SIB 2023) and Labour Force Survey (SIB 2022)

¹⁵ All economic activities are grouped in this list using the International Standard Industrial Classification of All Economic Activities (ISIC).

II. Analysis of relevance for #planBelize Medium-Term Development Strategy 2022-2026

In order to evaluate the alignment of the six identified sectors with national policies, they were compared against the ministerial and sector strategies and plan of action outlined in the #planBelize Medium-Term Development Strategy 2022-2026. Sectors that did not align with the projects outlined in the plan were discarded¹⁶, resulting in a shortlist of five sectors: 1) agriculture, forestry, and fishing; 2) manufacturing; 3) accommodation and food service activities; 4) real estate, business, and administrative activities; and 5) electricity¹⁷.

▶ **Table 6. Prioritized sectors and their coincidences with #planBelize Medium-Term Development Strategy 2022-2026**

Sector	Relevant projects in #planBelize Medium-Term Development Strategy 2022-2026
Agriculture, forestry, and fishing	<ul style="list-style-type: none"> ▶ Implementation of the Climate Resilient and Sustainable Agriculture Project to increase food production capacity and the adoption of climate-smart, green agriculture¹⁸. ▶ Improvement of infrastructure for the Central Farm Agro-Processing Unit. ▶ Duty exemptions on priority packaging and labelling equipment, climate-smart technologies, and essential agro-processing equipment to ensure local producers can produce competitively and adopt new technologies necessary to decrease risk in agriculture production.
Manufacturing	<ul style="list-style-type: none"> ▶ Capacity building for staff and processors (including women's and youth groups in product development/ production and value-addition of fruits and vegetables. ▶ Duty exemptions on priority packaging and labelling equipment, climate-smart technologies, and essential agro-processing equipment to ensure local producers can produce competitively and adopt new technologies necessary to decrease risk in agriculture production. ▶ Promotion of investment in light industries/ manufacturing, sewing factories. ▶ The training of 20 officers and 20 processors in product development and chimney solar dryer use to produce dehydrated root crops, fruits and vegetables. ▶ Development of new industries in the marine and coastal areas (i.e., seaweed, fish processing, and others),
Accommodation and food service activities	<ul style="list-style-type: none"> ▶ Implementation of a tourism recovery strategy. ▶ Establishment of a tourism trust to promote investment, growth, and development in the tourism sector, encouraging better management of tourism resources while supporting The National Sustainable Tourism Master Plan (NSTMP).

16 Wholesale and retail, and construction.

17 The energy sector was reconsidered given the ambitious projects described in the #planBelize Medium-Term Development Strategy 2022-2026, which will result in high demand for both professional and technical jobs.

18 Ministry of Agriculture, Food Security and Enterprise, Climate Resilient and Sustainable Agriculture (CRESAP).

Sector	Relevant projects in #planBelize Medium-Term Development Strategy 2022-2026
Accommodation and food service activities	<ul style="list-style-type: none"> ► Development of the National Blue Economy Strategy and Action Plan¹⁹. ► Exploration of clean development options in the Exclusive Economic Zone (approx. area of 21,544 miles²), i.e., sustainable deep-sea fishing, tourism ventures. ► Development of tourism training institute to develop skilled personnel (i.e., managers, chefs, bartenders, landscapers), as the industry needs.
Real estate; business and administrative activities	<ul style="list-style-type: none"> ► Development of an urban development policy. ► Creation of new immigration status for investors investing and/or retiring in Belize, and/or acquiring real estate in Belize of prescribed values. ► Concrete measures to realize the full potential of business process outsourcing (BPO) across the country, with value-added services (e.g., software programming), given our available, trained youth labour force, capabilities in English and Spanish languages, as well as the available information and communications technology (ICT) infrastructure throughout country.
Electricity	<ul style="list-style-type: none"> ► EmPOWERing Rural Electrification Project (to design and build a micro-grid in Indian Creek to supply electricity to Medina Bank, Golden Stream, Indian Creek. ► Investment into the establishment of solar farms/micro grids to reduce reliance on fossil fuels for energy and save importation costs of fuel. ► Restructure import duties on vehicles to encourage the importation of energy efficient modes of transportation including public transportation. ► The design and building of a 72 kilowatts (KW) micro-grid in Corazon Creek Village ► Provision of modern energy and support services to rural communities - microgrid development (Belize Electricity Limited). ► Development of an energy policy, energy Act, implementation of standards and labels, energy efficiency in public buildings and renewable energy strategy that promotes inclusion of MSMEs. ► Piloting e-mobility within Belize's public transport system. ► Development of a hybrid integrated utility services (IUS) model between the regulated and unregulated versions of the IUS for Belize. ► Development of alternative, renewable energy production options (e.g., solar, biomass, wind and hydro) to reduce dependence on high-cost fossil-fuel sources, reduce energy cost, and contribute positively to climate change mitigation.

Source: Author's own elaboration based on annual GDP by activity (SIB 2023) and Labour Force Survey (SIB 2022)

19 Government of Belize Press Office, Official Launch of Belize Blue Economy Development Policy & Strategy and Belize Maritime Economy Plan.

III. Selection of subsectors

The research team identified seven subsectors (at least one subsector for each of the five shortlisted sectors) based on their alignment with the #planBelize Medium-Term Development Strategy 2022-2026 and potential to engage diverse target groups. The proposed subsectors were subject to validation by the SDG Fund Joint Taskforce Working Group to ensure their appropriateness.

► **Table 7. Identified subsectors**

Selected subsector	Justification
Agriculture, forestry, and fishing	
Organic cocoa	<ul style="list-style-type: none"> ► Is aligned with the implementation of the Climate Resilient and Sustainable Agriculture Project ► Is consistent with the objectives of the #planBelize Medium-Term Development Strategy 2022-2026, this product holds the potential for exportation to the EU and the UK, while also providing a means of production for small and medium-sized producers in Belize. ► This activity employs a diverse workforce. In addition, cocoa is grown in communities with a high indigenous population density. ► The global cocoa beans market was valued at US\$13.9 billion in 2022 and is expected to grow at a compound annual growth rate of 7.4 per cent in 2023 (FMI 2022).
Coconut	<ul style="list-style-type: none"> ► Aligned with the aims outlined in the #planBelize Medium-Term Development Strategy 2022-2026, this product has the potential to evolve into a value-added product suitable for export to the EU and the UK. ► This activity employs a diverse workforce. In addition, coconut is grown in communities with a high indigenous population density. ► Global coconuts product market²⁰ was valued at US\$4.1 billion in 2021 and is expected to expand at a compound annual growth rate of 10 per cent until 2027 (Mordor Intelligence 2023).
Processing of dried and dehydrated food	
Manufacturing	<ul style="list-style-type: none"> ► Is aligned with the implementation of various projects outlined in the #planBelize Medium-Term Development Strategy 2022-2026²¹. ► Consistent with the objectives of the #planBelize Medium-Term Development Strategy 2022-2026, this product holds the potential for exportation to the EU and the UK while providing a means of production for small and medium-sized producers in Belize.

20 Includes fresh: coconuts in shell, dry coconuts, coconut oil, coconut water, and coconut milk.

21 1) Building the capacity of staff and processors in product development and value-addition of crops; 2) Providing duty exemptions on agro-processing equipment; 3) Offering training in the use of chimney solar dryers for dehydrating food; and 4) Facilitating the development of innovative industries in marine and coastal areas, such as seaweed.

Selected subsector	Justification
	<ul style="list-style-type: none"> ▶ Furthermore, it can be vertically integrated with agribusiness and fishing operations, and given that indigenous communities typically inhabit rural areas, this activity presents an opportunity to engage with these populations. ▶ The value of the global dried fruit market in 2020 was estimated at US\$7.4 billion in 2020 and is expected to reach US\$9.9 billion in 2027 (STATISTA 2020), and the global dried seaweed market size was worth around \$US14 billion in 2021 and is predicted to grow at a compound annual growth rate of 9.10 per cent between 2022 and 2030 (ZMR 2023).
Accommodation and food service activities	
Sustainable tourism	<ul style="list-style-type: none"> ▶ Is aligned with the implementation of various projects outlined in the #planBelize Medium-Term Development Strategy 2022-2026²². ▶ This value chain offers productive linkages with other relevant activities in the country, such as agriculture (rural tourism), commerce, and transportation. ▶ This activity currently employs a diverse workforce. ▶ This form of tourism is predominantly carried out by small and medium-sized producers in Belize. ▶ The global sustainable tourism market size is estimated to increase by US\$335.93 billion in 2027; this market is expected to grow at a compound annual rate of growth of 9.54 per cent (Technavio 2023).
Real estate; business and administrative activities	
Business process outsourcing	<ul style="list-style-type: none"> ▶ Is aligned with the implementation of project of Concreting measures to realize the full potential of BPO across the country, with value-added services. ▶ Is consistent with the objectives of the #planBelize Medium-Term Development Strategy 2022-2026, this value chain holds the potential value-added exports. ▶ This activity employs a diverse workforce with a high incidence of women and young workers. ▶ The global BPO market was valued at US\$261.9 billion in 2022 and is expected to expand at a compound annual growth rate of 9.4 per cent from 2023 to 2030 (GVR 2022).

22 1) Implementation of a tourism recovery strategy; 2) Establishment of a tourism trust; 3) Development of the national Blue economy strategy and action plan; and 4) Exploration of clean development options in the Exclusive Economic Zone; and 5) Development of tourism training institute.

Selected subsector	Justification
Energy	
Sustainable energy	<ul style="list-style-type: none"> ▶ Is aligned with the implementation of various projects outlined in the #planBelize Medium-Term Development Strategy 2022-2026²³. ▶ Consistent with the objectives of the #planBelize Medium-Term Development Strategy 2022-2026, this product holds the potential for exportation to the EU and the UK, while also providing a means of production for small and medium-sized producers in Belize. ▶ Furthermore, it can be vertically integrated with agribusiness and fishing operations and given that indigenous communities typically inhabit rural areas, this activity presents an opportunity to engage with these populations. ▶ The value of the global dried fruit market in 2020 was estimated at US\$7.4 billion in 2020 and is expected to reach US\$9.9. billion in 2027 (STATISTA 2020), and the global dried seaweed market size was worth around US\$14 billion in 2021 and is predicted to grow at a compound annual growth rate of 9.10 per cent between 2022 and 2030 (ZMR 2023).

Source: Author's own elaboration and validated by Joint SDG Taskforce

Subsector analysis

To identify the most relevant activities to the study's objective, each subsector was evaluated based on eight dimensions, grouped into three clusters. For this, in addition to the documentary analysis, several interviews were conducted with key actors. In addition, the SDG task force shared and validated the final assessment (for a detailed list of the SDG task force group participants, go to Appendix 2).

Each of these clusters was assigned a score from one to three, with three being the highest score and one the lowest (for a detailed description of the assessment criteria, go to Appendix 3. In addition to the scores, specific weights were assigned to each criterion based on its relevance to the working group (for a detailed description of weights, go to Appendix 4).

23 1) Establishment of solar farms/microgrids; 2) Provision of modern energy and support services to rural communities; 3) Development of energy policy, energy Act, implementation of standards and labels, energy efficiency in public buildings, and renewable energy strategy that promotes the inclusion of MSMEs; and 4) Development of alternative, renewable energy production options.

Organic cocoa

Criteria	Score	Description
Dimension 1: Potential for employment creation		
Growth potential	3	<ul style="list-style-type: none"> ▶ The global cocoa beans market was valued at US\$13.9 billion in 2022 and is expected to grow at a compound annual growth rate of 7.4 per cent in 2023 (FMI 2022). ▶ The cocoa bean sector in Belize is relatively tiny. National production (174 tons) represents about 0.001 per cent of global cocoa production (17.7 million tons)²⁴. ▶ Cocoa production in Belize relies on small producers; there are approximately 1,200 cocoa farmers in Belize, 15,000 persons depend on the industry, and the crop is grown on over 1,200 hectares of land (FCIA n.d.).
Potential for decent work	1	<ul style="list-style-type: none"> ▶ While organic, fair-trade, and rainforest alliance-certified farms offer formal and decent jobs, working conditions in regular cocoa farms tend to be precarious; workers are vulnerable to exploitation, child labour, low pay, and unsafe working conditions. ▶ In 2021, the US Department of Labor's annual report on child labour and forced labour identified Belize as a country with many children engaged in hazardous work, including in the cocoa sector (DOL 2021).
Participation in the green economy	3	<ul style="list-style-type: none"> ▶ A large percentage of cacao production in Belize is produced and marketed as organic (FCIA n.d.). ▶ Many small-scale cocoa farmers in Belize use sustainable farming even if their product is not certified as organic. ▶ Given the increasing international demand, there have been efforts to increase organic cocoa production through certification programmes such as Rainforest Alliance and Fair-trade or through special projects such as the Sustainable Cocoa Initiative, launched in 2018 by the Inter-American Development Bank (IDB) and the Belize Cocoa Board.
Dimension 2: Relevance to the target group		
Women participation	1	<ul style="list-style-type: none"> ▶ Women represent 11.6 per cent of the total employment in the agriculture sector in Belize. ▶ While there is no figure on women's employment in cocoa production, based on consultations with sector experts and anecdotal observations, the participation of women in the cocoa sector tends to be low and limited to feminized activities.

Criteria	Score	Description
Indigenous groups participation	3	▶ While there is no figure on indigenous employment in cocoa production, based on consultations with sector experts and anecdotal observations, participation of indigenous groups in the cocoa sector tends to be high.
Young workers participation	3	▶ Young workers (15-24 years old) represent 20.4 per cent of the total employment in the agriculture sector in Belize. ▶ While there is no figure on young employment in cocoa production, based on consultations with sector experts and anecdotal observations, the participation of young workers in the cocoa sector tends to be high.
Dimension 3: Feasibility for intervention		
Willingness of relevant actors	3	▶ Public and private actors are interested in promoting cocoa production, which aligns with #planBelize Medium-Term Development Strategy 2022-2026 commitment to increasing value-added exports in a growing market.
Market feasibility	2	▶ Given the homogeneity in the certified organic agricultural processes, it is possible to implement sectoral policies and projects associated with promoting investment in the subsector.

Coconut

Criteria	Score	Description
Dimension 1: Potential for employment creation		
Growth potential	3	▶ Global coconuts product market ²⁵ was valued at US\$4.1 billion in 2021 and is expected to expand at a compound annual growth rate of 10 per cent until 2027 (Mordor Intelligence 2023). ▶ National production of coconut in shell (1,621 tons) represents about 0.003 per cent of global cocoa production (64 million tons) ²⁶ . ▶ 17,000 acres of coconuts are cultivated in Belize, with coconut water and coconut oil as the primary products (Morales 2022).

25 Includes: fresh coconuts in shell, dry coconuts, coconut oil, coconut water, and coconut milk.

26 Author's own calculation based on (FAO, 2023).

Criteria	Score	Description
Potential for decent work	2	<ul style="list-style-type: none"> ▶ Working conditions in the sector are heterogeneous along the value chain. Given the need for extensive land extensions to produce this crop, some agricultural producers and large-scale coconut byproduct manufacturers offer decent jobs. However, working conditions for some temporary agricultural workers and occupations in handcrafted byproducts MSMEs tend to be precarious.
Participation in the green economy	2	<ul style="list-style-type: none"> ▶ According to consultations with sector experts, organic coconut demand is relatively low (Compared with other products). However, coconut consumption's carbon footprint and water consumption are moderate.
Dimension 2: Relevance to the target group		
Women participation	1	<ul style="list-style-type: none"> ▶ Women represent 11.6 per cent of Belize's total employment in the agriculture sector. ▶ While there is no figure on women's employment in coconut production, based on consultations with sector experts and anecdotal observations, the participation of women in the cocoa sector tends to be low and limited to feminized activities.
Indigenous groups participation	2	<ul style="list-style-type: none"> ▶ While there is no figure on indigenous employment in coconut production, based on consultations with sector experts and anecdotal observations, participation of indigenous groups in the coconut sector tends to be moderate.
Young workers participation	3	<ul style="list-style-type: none"> ▶ Young workers (15-24 years old) represent 20.4 per cent of the total employment in the agriculture sector in Belize. ▶ While there is no figure on indigenous employment in cocoa production, based on consultations with sector experts and anecdotal observations, participation of indigenous groups in the cocoa sector tends to be high.
Dimension 3: Feasibility for intervention		
Willingness of relevant actors	3	<ul style="list-style-type: none"> ▶ Public and private actors are interested in promoting coconut production; this aligns with #planBelize Medium-Term Development Strategy 2022-2026 commitment to increasing value-added exports in a growing market and reducing imports. In addition, it has been highlighted as one of the priority sectors to promote by the Ministry of Agriculture (Morales 2022).
Market feasibility	1	<ul style="list-style-type: none"> ▶ The variability in processes, technology, and investments required to manufacture coconut derivatives limits the implementation of sectoral actions. If those were focused on agriculture, the potential of employment creation tends to be low.

Processing of dried and dehydrated food

Criteria	Score	Description
Dimension 1: Potential for employment creation		
Growth potential	3	<ul style="list-style-type: none"> ► The value of the global dried fruit market in 2020 was estimated at US\$7.4 billion in 2020 and is expected to reach US\$9.9 billion in 2027 (STATISTA 2020). ► The global dried seaweed market size was worth around US\$14000 million in 2021 and is predicted to grow at a compound annual growth rate of 9.10 per cent between 2022 and 2030 (ZMR 2023), making it one of the most promising products in the dehydrated food industry. ► Dry fruit consumption has been increasing rapidly due to the increasing consumption of healthy and nutritious foods due to the rise in obesity and the aging population (Hancock 2023). ► There is much disparity between the players in the sector. On the one hand, employment in economic activities such as the hotel industry is usually formal, while transportation or food and beverages usually operate informally.
Potential for decent work	3	<ul style="list-style-type: none"> ► The current production of dry fruits in Belize is still incipient. However, companies working in the sector tend to offer jobs in decent conditions. ► To offer decent job conditions has become a requisite to export to the leading importer (EU) as part of complying with recently developed business and human rights regulations.
Participation in the green economy	3	<ul style="list-style-type: none"> ► Given the weather conditions of Belize, the drying process can be done naturally, which means a reduced carbon footprint.
Dimension 2: Relevance to the target group		
Women participation	3	<ul style="list-style-type: none"> ► While there is no figure on women's employment in this activity, occupations related to processing of dried and dehydrated food tend to have equal participation of men and women.
Indigenous groups participation	3	<ul style="list-style-type: none"> ► While there is no figure on indigenous group employment in this activity, there is no cultural, educational, or geographical limitation for this group to participate in this activity.
Young workers participation	3	<ul style="list-style-type: none"> ► While there is no figure on young workers' employment in this activity, there is no cultural, educational, or geographical limitation for this group to participate in this activity.

Criteria	Score	Description
Dimension 3: Feasibility for intervention		
Willingness of relevant actors	3	<ul style="list-style-type: none"> Public and private actors are interested in promoting dry fruit production, which aligns with #planBelize Medium-Term Development Strategy 2022-2026 commitment to increasing value-added exports in a growing market. In addition, the promotion of this activity impacts agriculture production chains.
Market feasibility	3	<ul style="list-style-type: none"> Given the homogeneity in the existing processes, technology, and infrastructure for dried fruits production, it is feasible to implement sectoral actions associated with promoting the sector that translates into creating jobs.

Sustainable tourism

Criteria	Score	Description
Dimension 1: Potential for employment creation		
Growth potential	3	<ul style="list-style-type: none"> The global sustainable tourism market size is estimated to increase by US\$335.93 billion in 2027; this market is expected to grow at a compound annual rate of growth of 9.54 per cent (Technavio 2023). Tourism has great potential as a driver of employment: it is estimated that the tourism sector employs (isolating the effects of the pandemic) directly and indirectly one in ten jobs worldwide and generates one in four new jobs. It is estimated that for every tourism job created directly, almost one and a half additional jobs are created indirectly or induced (ILO 2022). The potential for further growth in Belize's tourism activity is high; tourism in Belize is categorized as an "emerging" sector rather than a "mature" one. Compared to well-established Caribbean tourism destinations, Belize's tourism industry is relatively new (Chow 2019). Latest estimations suggest that tourism represents 21.3 per cent of total GDP and 13 per cent of total employment (Ministry of Tourism 2017).
Potential for decent work	2	<ul style="list-style-type: none"> There is much disparity between the players in the sector. On the one hand, employment in economic units such as hotels is usually formal and decent. At the same time, MSMEs in transportation, tour operation, or food and beverages have a higher informality rate. While there is no figure on informal employment in this activity, 56.4 per cent of informal jobs were performed by self-employed persons. Some of them are in the tourism sector; examples of these jobs are taxi drivers, shop attendants, and cooks, to name a few (SIB 2022).

Criteria	Score	Description
Participation in the green economy	3	▶ Tourism is one of the ten economic sectors identified in the UNEP Green Economy Report, whose greening could increase prosperity, create employment, and reduce poverty. A green tourism economy would ensure significant environmental benefits, including reductions in water consumption, energy use, and CO2 emissions. Given tourism's sheer size and reach, even small changes toward greening can have significant impacts (UNWTO 2019).
Dimension 2: Relevance to the target group		
Women participation	3	▶ Women represent 52 per cent of total formal employment in the tourism sector in Belize (SIB 2022).
Indigenous groups participation	3	▶ While there is no figure on indigenous group employment in this activity, there is no cultural, educational, or geographical limitation for this group to participate. On the contrary, the sector benefits from the participation of indigenous groups mainly for communitarian and rural tourism.
Young workers participation	3	▶ While there is no figure on young workers' employment in this activity, based on consultations with sector experts and anecdotal observations, participation of indigenous groups in sustainable tourism tends to be high.
Dimension 3: Feasibility for intervention		
The willingness of relevant actors	3	▶ Public and private actors are interested in promoting sustainable tourism; this is in line with #planBelize Medium-Term Development Strategy 2022-2026. In addition, the promotion of this activity impacts production chains with agriculture (in agro-tourism) and blue economies (through sustainable coastal and marine tourism archives).
Market feasibility	2	▶ Given the variability in the existing processes and infrastructure for this activity, it is possible to carry out generic sectoral actions associated with promoting sectorial actions. However, these actions only address some opportunities in the sector. Particular needs associated with specific services may not be part of a sectorial action plan.

Business process outsourcing

Criteria	Score	Description
Dimension 1: Potential for employment creation		
Growth potential	3	<ul style="list-style-type: none"> ▶ The global BPO market was valued at US\$261.9 billion in 2022 and is expected to expand at a compound annual growth rate of 9.4 per cent from 2023 to 2030 (GVR 2022). ▶ Historically, the offshore outsourcing sector of Belize has experienced tremendous growth of over 80 per cent in the past few years, starting with only one centre opening its doors in 2005 to over 27 centres employing over 8,000 agents in 2022 (Palma 2022).
Potential for decent work	3	<ul style="list-style-type: none"> ▶ While there is no figure on informality or precarious conditions in this activity, based on consultations with sector experts and anecdotal observations, companies working in the sector tend to offer jobs in decent conditions.
Participation in the green economy	1	<ul style="list-style-type: none"> ▶ The development of BPO firms in the country has a low impact on the reduction of emissions and environmental degradation of the country.
Dimension 2: Relevance to the target group		
Women participation	3	<ul style="list-style-type: none"> ▶ While there is no figure on women's employment in this activity, occupations related to BPO tend to have equal participation of men and women.
Indigenous groups participation	1	<ul style="list-style-type: none"> ▶ While there is no figure on indigenous group employment, given the locations, education levels, and language domain, participation of indigenous groups in this activity tends to be low. This is consistent with consultations with sector experts and anecdotal observations.
Young workers participation	3	<ul style="list-style-type: none"> ▶ While there is no figure on young workers' employment in this activity, there is no cultural, educational, or geographical limitation for this group to participate. Based on consultations with sector experts and anecdotal observations, the participation of young workers in this activity tends to be high.
Dimension 3: Feasibility for intervention		
Willingness of relevant actors	3	<ul style="list-style-type: none"> ▶ Public and private actors are interested in promoting BPO, which aligns with #planBelize Medium-Term Development Strategy 2022-2026.
Market feasibility	2	<ul style="list-style-type: none"> ▶ Given the homogeneity in the existing processes, technology, and infrastructure for BPO production, it is feasible to implement sectoral actions associated with developing skills in the community. However, only a few actions can be taken to promote the demand in this sector.

Sustainable energy

Criteria	Score	Description
Dimension 1: Potential for employment creation		
Growth potential	3	<ul style="list-style-type: none"> ▶ #planBelize Medium-Term Development Strategy 2022-2026 has started several large-scale projects²⁷ that will represent an exponential growth in the demand of workers and service providers in the sustainable energy sector. ▶ Sustainable energy can create between 0.4 and 1.1 jobs per gigawatt hours (GWh) per year, with photovoltaic energy having the most significant potential, with an average of 0.87 (Wei 2010).
Potential for decent work	3	<ul style="list-style-type: none"> ▶ While there is no figure on informality or precarious conditions in this activity, based on consultations with sector experts and anecdotal observations, companies working in the sector tend to offer jobs in decent conditions.
Participation in the green economy	3	<ul style="list-style-type: none"> ▶ Developing a sustainable energy subsector can significantly reduce emissions and environmental degradation in the country.
Dimension 2: Relevance to the target group		
Women participation	1	<ul style="list-style-type: none"> ▶ While there is no figure on women's skills availability, technical occupations related to energy typically tend to have an unbalanced proportion of women in the labour force. ▶ Based on consultations with sector experts and anecdotal observations, the participation of women in this activity tends to be high.
Indigenous groups participation	1	<ul style="list-style-type: none"> ▶ While there is no figure on indigenous group employment, given the locations, education levels, and language domain, participation of indigenous groups in this activity tends to be low. This is consistent with consultations with sector experts and anecdotal observations.
Young workers participation	3	<ul style="list-style-type: none"> ▶ While there is no figure on young workers' employment in this activity, there are no cultural, educational, or geographical limitations for this group to participate in this activity. Based on consultations with sector experts and anecdotal observations, the participation of young workers in this activity tends to be high.

²⁷ Energy projects include 1) a rural electrification project (design and build a Micro-Grid in Indian Creek to supply electricity to Medina Bank, Golden Stream, Indian Creek; 2) the design and building of a 72 KW micro-grid in Corazon Creek Village, Provision of modern energy and support services to rural communities; 3) the development of an energy policy, energy Act, implementation of standards and labels, energy efficiency in public buildings and renewable energy strategy that promotes the inclusion of MSMEs; and 4) the development of alternative, renewable energy production options (e.g., solar, biomass, wind and hydro) to reduce dependence on high-cost fossil-fuel sources, reduce energy cost, and contribute positively to climate change mitigation.

Criteria	Score	Description
Dimension 3: Feasibility for intervention		
Willingness of relevant actors	3	<ul style="list-style-type: none"> Public and private actors are interested in promoting energy; this aligns with #planBelize Medium-Term Development Strategy 2022-2026.
Market feasibility	2	<ul style="list-style-type: none"> Given the homogeneity in the existing processes, technology, and infrastructure for sustainable energy, it is feasible to implement sectoral actions associated with developing skills in the community. However, very few actions can be taken to promote the demand in this sector. The feasibility of intervention will depend on the Government executing the investment and reform projects planned.



© Adobe images: Worker peeling coconut (JC_Stocker)

General assessment

Criteria	Weight	Organic cocoa		Coconut		Processing of dried and dehydrated food		Sustainable tourism		BPO		Sustainable energy	
		Score	Weighted score	Score	Weighted score	Score	Weighted score	Score	Weighted score	Score	Weighted Score	Score	Weighted Score
Growth potential	15%	3	0.45	3	0.45	3	0.45	3	0.45	3	0.45	3	0.45
Potential for decent work	15%	1	0.15	2	0.3	3	0.45	2	0.3	3	0.45	3	0.45
Participation in the green economy	10%	3	0.3	2	0.2	3	0.3	3	0.3	1	0.1	3	0.3
Women participation	10%	1	0.1	1	0.1	3	0.3	3	0.3	3	0.3	1	0.1
Indigenous groups participation	10%	3	0.3	2	0.2	3	0.3	3	0.3	1	0.1	1	0.1
Young workers participation	10%	3	0.3	3	0.3	3	0.3	3	0.3	3	0.3	3	0.3
Willingness of relevant actors	15%	3	0.45	3	0.45	3	0.45	3	0.45	3	0.45	3	0.45
Market feasibility	15%	2	0.3	3	0.45	3	0.45	2	0.3	2	0.3	2	0.3
Total		19	2.35	19	2.45	24	3	22	2.7	19	2.45	19	2.45

Value chain analysis

While all the identified sectors have opportunities, the present report aims to prioritize recommendations. To achieve this, a concentrated effort will be made to comprehend the following value chains:

- ▶ Processing of dried and dehydrated food; and
- ▶ Sustainable tourism

These sectors represent significant opportunities for industry diversification, development of high-value exports, and consolidation of tourism. The actions derived from this plan have different timelines for each of the sectors. On one hand, tourism is currently in the process of recovering from the effects of COVID-19 on businesses and employment. Additionally, it faces a highly competitive environment where sustainability has become mainstream in the sector, thus reducing its differentiation potential. Therefore, the recommendations from this report can be implemented in the short term. On the other hand, the food processing sector is a promising sector that would allow for favourable integration into a high-demand, low-supply market for value-added exports and productive linkages with other priority sectors for the country, such as agriculture or blue economies. In addition, these two value chains can potentially create green jobs²⁸ thereby contributing to the concept of a just transition²⁹.

However, applying the recommendations derived from this plan has a medium-term scope, as some projects from the #planBelize Medium-Term Development Strategy 2022-2026 and Government actions still need to be developed to ensure a favourable environment for business development.

The present report's recommendations may be applicable nationwide. However, the analysis of the value chains under consideration will be presented as case studies in particular locations. This approach will comprehensively examine the relevant actors, their roles, and their interrelationships. Moreover, it will offer valuable insights for tailored interventions. Specifically, the two selected locations for the case studies are the districts of Stann Creek and Toledo.

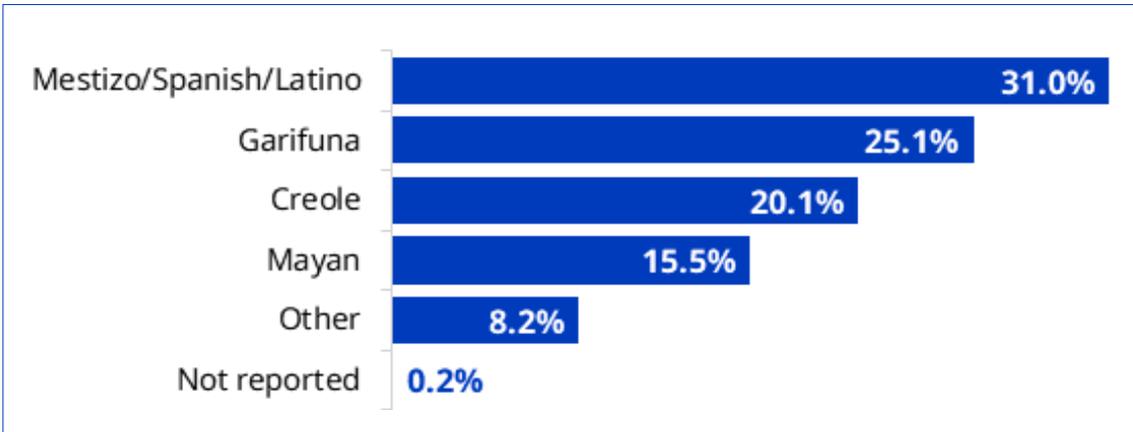
Stann Creek District

Stann Creek District is situated in the southeastern region of Belize, approximately 90 miles from Belize City, and has a population of around 47,160 individuals, with females comprising 48.5 per cent (SIB 2021). The district is characterized by its cultural diversity, with several ethnic groups residing there. Notably, around 48 per cent of all Garifuna individuals in the country live in Stann Creek, accounting for 25 per cent of the district's population. Mayans represent an essential community, comprising approximately 15 per cent of the district's inhabitants (SIB 2010).

²⁸ Green jobs are decent jobs in any economic sector which contribute to preserving, restoring, and enhancing environmental quality. Green jobs reduce the environmental impact of enterprises and economic sectors by improving the efficiency of energy, raw materials, and water; de-carbonizing the economy and bringing down emissions of greenhouse gases; minimizing or avoiding all forms of waste and pollution; protecting or restoring ecosystems and biodiversity; and supporting adaptation to the effects of climate change.

²⁹ Greening the economy in a way that is as fair and inclusive as possible to everyone concerned, creating decent work opportunities, and leaving no one behind.

► **Graph 9. Population by ethnicity group in Stann Creek District**



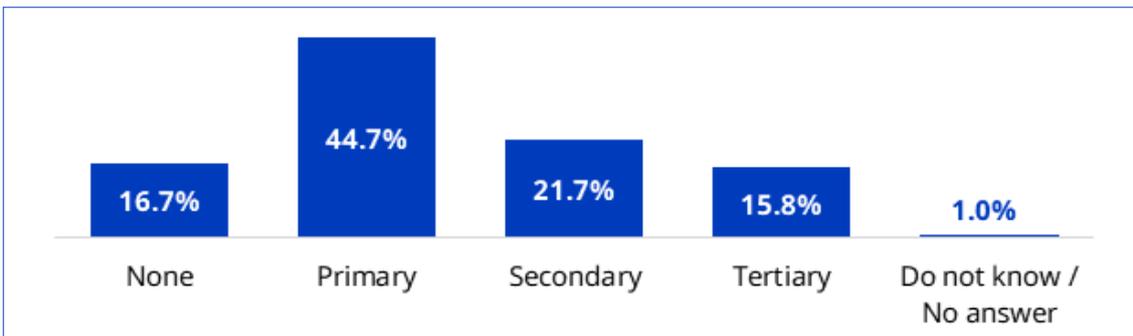
Source: Author’s own elaboration with data of (SIB 2010)

The Stann Creek District features a diversified economy with agriculture³⁰, fishing, and aquaculture. The district's agricultural sector is notable for its exports of critical commodities, such as citrus and banana. Apart from agriculture, tourism is a crucial contributor to the district's economy. Moreover, a manufacturing industry is taking shape in the district, with several firms engaged in the production of construction materials and agro-based products, driven mainly by the nearness to the port of Big Creek or Cala Grande, which is the main port of Belize's agricultural exports (DLCA 2021).

The labour market in Stann Creek District is marked by a substantial level of informality, with a notable portion of the populace employed in self-employment or the informal sector. As of April 2021, the district's unemployment rate stood at 14 per cent, with women disproportionately affected at 23 per cent³¹.

This district's education level is relatively low, with a significant portion of the population lacking formal education. Specifically, approximately 16.7 per cent of the working-age population have no education³², 34 per cent have completed only primary education, and only 158 per cent have attained tertiary education, indicating a comparatively limited pool of highly skilled workers. (SIB 2010).

► **Graph 10. Education level in working age population by gender in Stann Creek**



Source: Author’s own elaboration with data of (SIB 2022)

30 The main crops consist of citrus, bananas, and mangoes.

31 Although women account for 37 per cent of the district's economically active population, they comprise 63 per cent of the unemployed labour force (SIB 2021).

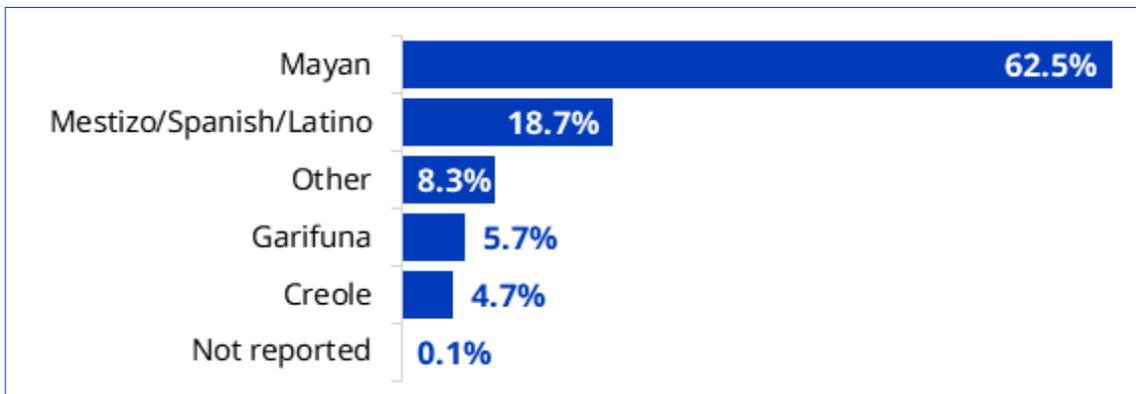
32 Includes both, those who have not finished or started primary school, as this is the official classification by SIB.

Overall, while Stann Creek District faces several economic challenges, such as a limited formal job market and high informality, the district's natural resources and proximity to key export markets offer opportunities for growth and development in the agriculture, manufacturing, and tourism sectors.

Toledo District

Toledo District is situated in the southernmost region of Belize, is home to nearly 1700 square miles of rainforest, mountains, rivers, and offshore islands, and has a population of around 40,517 individuals (SIB, 2021). The Mayan population is particularly significant in this district, accounting for around 62 per cent of the total population in Toledo (SIB 2010).

► **Graph 11. Population by ethnicity group in Toledo District**

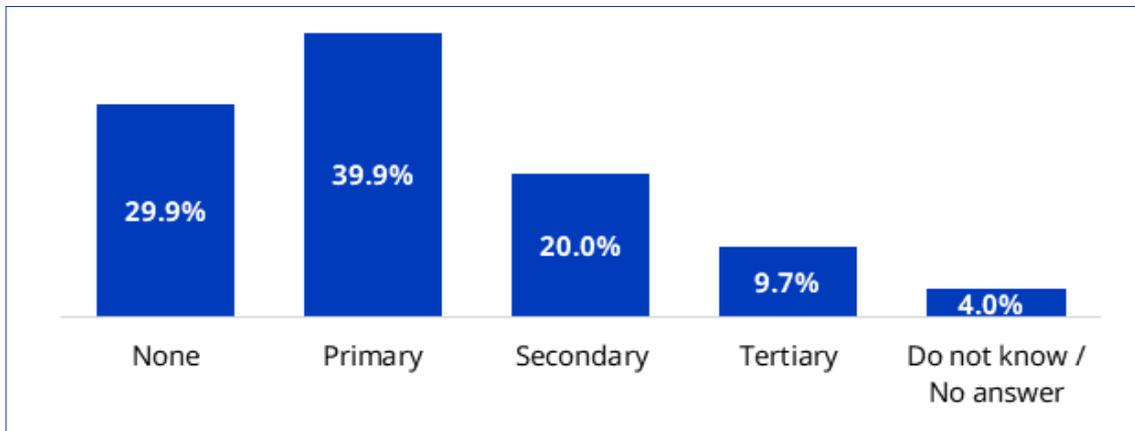


Source: Author's own elaboration with data of (SIB 2010)

The district's economy is primarily driven by agriculture, with a strong focus on traditional subsistence farming and agroforestry. Key crops produced in the district include corn, beans, rice, and vegetables and cash crops such as cacao, coffee, and cardamom. The fishing industry is also important, particularly for coastal communities such as Punta Gorda and Monkey River. In recent years, the district has also seen growth in the tourism sector, particularly ecotourism, and cultural tourism, as visitors are drawn to the district's natural beauty, rich biodiversity, and Mayan cultural heritage.

The labour market in Toledo District is characterized by high levels of informality, with a significant portion of the population engaged in self-employment or working in the informal sector. As of April 2021, the district's unemployment rate stood at 13 per cent.

Like Stann Creek District, the Toledo District's education level is relatively low, with a substantial proportion of the population lacking formal education. Notably, around 29.9 per cent of the population has yet to have an education, 39.9 per cent has completed only primary education, and only 9.7 per cent has attained tertiary education, indicating a comparatively limited pool of highly skilled workers in the district (SIB 2010).

► **Graph 12. Education level by gender in Toledo**

Source: Author's own elaboration with data of (SIB 2022)

Overall, while Toledo District faces economic challenges, such as limited formal job opportunities and high levels of informality, the district's natural resources and cultural heritage offer opportunities for growth and development in the agriculture, fishing, and tourism sectors. With continued investments in infrastructure and support for small businesses and entrepreneurs, the district can build on its strengths and contribute to Belize's overall economic growth and development.

Sustainable tourism

Market overview

During the past few decades, tourism has experienced a steady expansion and diversification, transforming into one of the most significant and most rapidly growing economic sectors on a global scale. As of 2019, the revenue generated by international tourism amounted to US\$1.7 trillion, which constitutes 29 per cent of the world's services exports and 7 per cent of the total exports (UNWTO 2019).

Tourism catalyzes economic growth, enterprise expansion, and employment opportunities, especially for marginalized groups such as women, youth, migrant workers, and local communities. Prior to the pandemic, the tourism industry was responsible for creating one in every ten jobs worldwide, both directly and indirectly, and accounted for one in every four new job opportunities. Furthermore, it is estimated that for every tourist job created directly, an additional one and a half positions are created indirectly or induced (ILO 2022).

The expansion of the tourism sector stopped due to the COVID-19 health crisis. To mitigate the spread of the virus, governments implemented border closures, travel restrictions, and the closure of non-essential activities. In addition, many tourists opted to cancel or reduce their international travel, leading to a sudden decline in tourism demand. These factors resulted in a contraction of the sector by 49.1 per cent in 2020 and the closure of numerous businesses, which caused the loss of over 62 million jobs worldwide (Laine et al. 2022).

This impact was particularly drastic for MSMEs, where decent work deficits are most pronounced, disproportionately affecting more vulnerable groups such as women, youth, migrant workers, and indigenous and tribal peoples who tend to show higher levels of labour informality. As a result, inequalities in the sector have increased, and the gains made in recent years regarding gender equality and women's rights have regressed (ILO 2022).

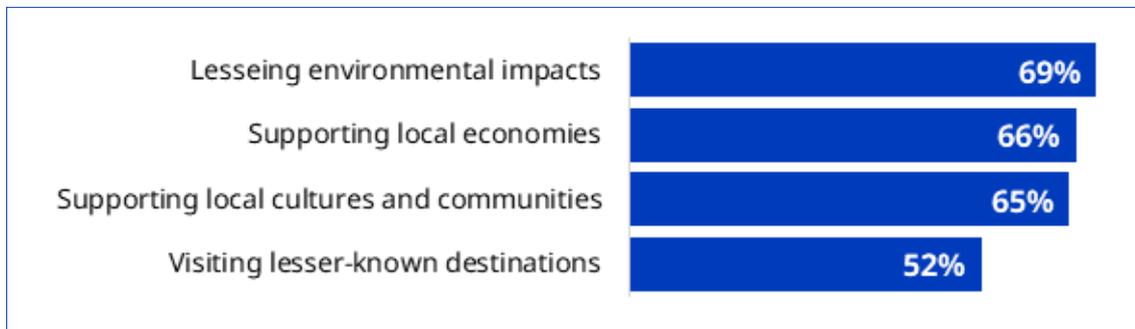
In addition to the changes resulting from the impact of the health crisis, the global tourism industry is transforming and mainstreaming sustainable tourism. The continuous global efforts to combat climate change have reached the tourism sector³³, mainly driven by an increase in the awareness of consumers and government regulations. Today more than 90 per cent of tourists are seeking some form of sustainable option in their travels (Expedia 2022).

Currently, sustainable tourism is understood from two distinct perspectives. The first, and probably the most well-known, is ecotourism, which involves travel aimed at recreational activities to appreciate and learn about nature through direct contact. It generally includes educational and nature interpretation aspects, minimizes negative impacts on the natural and sociocultural environment, and contributes to the maintenance of natural tourism areas; by 2021, the global ecotourism market size was valued at US\$185.87 billion and is expected to expand at a compound annual growth rate of 15.2 per cent from 2022 to 2030 (GVR 2021).

The second and more recent perspective focuses on transforming tourism services and popular destinations to generate a lower social and environmental impact. This includes reducing emissions from transportation, incorporating sustainable practices to reduce energy consumption in accommodation, and engaging with corporate social responsibility programmes in the community.

Recent studies on travelers' consumer attitudes, values, and motivations, elaborated by (Expedia 2022), reveal that travelers prioritize more than just the environment when making travel decisions. Consumers consider supporting local economies and cultures equally essential aspects of sustainable travel.

► **Graph 13. Criteria appreciated by travelers in sustainable travel**



Source: Author's own elaboration based on (Expedia 2022)

While increasing awareness of social issues by tourists represents opportunities for sustainable tourism, it has raised some concerns about how tourism companies interact with indigenous communities. A growing number of critics believe place brands in general and tourist destinations have exploited indigenous groups for the commercial purpose of entertaining visitors (Gertner 2019); this has driven essential changes in both public and private policies to prevent cultural appropriation claims and is expected to change the consumption of travelers in the following years drastically.

Tourism in Belize

Belize possesses diverse natural assets, making ecotourism, agro-tourism, and adventure tourism a significant part of its offering. The country's rich historical background is reflected in numerous heritage sites, many of which have Mayan origins and hold immense value for tourism. The BTB describes the Belize tourism product as an exclusive multicultural sustainable destination in the Central American

33

It is estimated that 8 per cent of the world's greenhouse gas emissions are generated by tourism (UNWTO 2023).

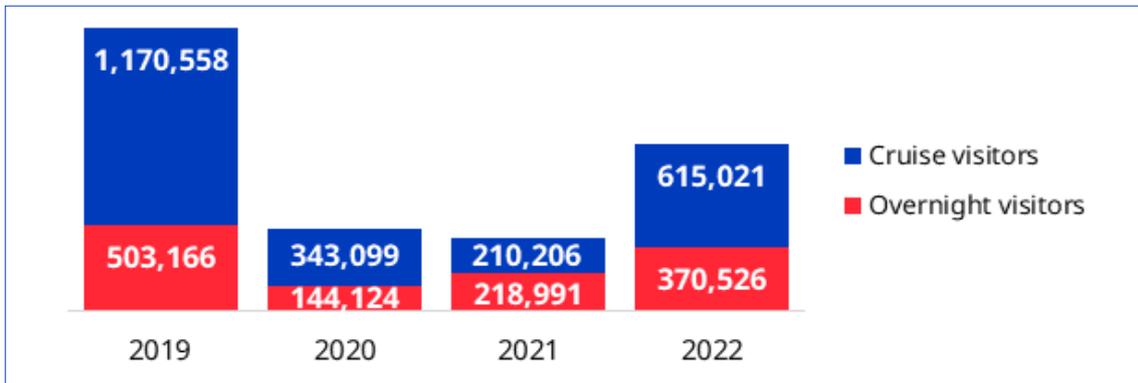
Caribbean. The living cultures blend Kriol, Garifuna, Mestizo, Maya, and Mennonite, a unique opportunity for visitors to experience and learn. Furthermore, Belize's strategic location provides access to Central America and the Caribbean Sea, offering tourists a wealth of beautiful biodiversity. Moreover, its geography and manageable size allow for convenient access and easy visitor movement (BTB 2011).

The tourism industry in Belize has continued to grow over the last two decades in both the overnight and cruise sectors. The terrestrial and marine-based products have diversified and welcome visitors year-round. Belizeans are now productively engaged in tourism as tourism is one of the most important economic activities of the country, contributing to 18-25 per cent of the total GDP (varies depending on the source), and accounting for about 28 per cent of total employment (BTB 2011). One of the main characteristics of the sector in Belize is the high incidence of MSMEs, which account for 70 per cent of the touristic employment and income in the country (BTB 2022).

The COVID-19 pandemic has had a substantial impact on the tourism industry in Belize. To limit the spread of the virus, the country promptly closed its borders to international travelers and implemented strict measures. The effect on tourism-related businesses, such as hotels and tour operators, was immediate and profound, with many of them forced to shut down or operate at a reduced capacity.

Consequently, the total number of visitors in the country significantly declined by over 70 per cent in 2020. This unprecedented downturn in the tourism industry has had far-reaching implications on the country's economy and the livelihoods of its citizens who rely on tourism for their income. The Government of Belize has responded by implementing various measures to mitigate the impact of the pandemic on affected individuals and businesses. However, the recovery of the tourism industry remains uncertain and will likely take time to return to pre-pandemic levels.

► Graph 14. Overnight visitors per year



Source: Author's own elaboration based on (BTB 2023)

In 2022, Belize received 370,526 overnight arrivals and 615,021 cruise visitor arrivals. The primary market source of tourists is North America; the US accounts for 83 per cent of travelers, Canada for 2 per cent, and Mexico for 1 per cent. Europe is the second most crucial market accounting for 4 per cent of visitors.

Given its natural and economic conditions, Belize has organically positioned as an ecotourism destination. However, there are still some challenges to achieving full sustainability. Most of the transportation is still fossil fuel-based, accommodations lack sustainable infrastructure such as solar heaters or rainwater harvesting systems, and restaurants do not offer organic or sustainable menus, to mention a few.

Aside from sustainability, there are numerous challenges to overcome and threats to mitigate. While the NSTMP is currently under revision for the update, some of the most important constraints identified in

2011 already exist in the country, being some of the most important:

- ▶ Poor level of accessibility on land, mainly due to a small amount of paved roads leading to the tourism assets.
- ▶ Poor level of accessibility by air, mainly due to few international flight connections, mainly to Europe and Latin America.
- ▶ Lack of good and qualitative tourism services and facilities, mainly due to poor training methods, low investment level of the local private sector, and few international hotel brands. Resulting in low visitor satisfaction and low competitiveness.
- ▶ Scarce Belizean-made handicrafts and commercialization of traditional products and leisure activities.
- ▶ Inadequate (natural and heritage) asset management, mainly due to lack of awareness, knowledge, and financial issues, ultimately leads to the destination's degradation.
- ▶ Deficient of communication and promotion of tourism assets, results in lack of international awareness of Belize as a tourism destination.
- ▶ Insufficient waste disposal and sewage systems, resulting in unhealthy conditions and visual pollution.
- ▶ Lack of urban land planning and land use regulation, resulting in haphazard and inadequate urban development, beach erosion, and land use conflict.
- ▶ Lack of public awareness programmes, leading to inappropriate usage of natural resources, such as the reef, national parks, and rainforests
- ▶ Due to low awareness of tourism benefits and links to markets, local communities need to be integrated into the Tourism Value Chain.

In addition, recent natural disasters resulting from climate change and pandemic impact have made evident the exposure of the sector in the country. The lack of insurance in MSMEs, the vulnerability of roads and other infrastructure, and limited access to capital have made resilience become one of the major concerns of the sector representatives.

Tourism in the Stann Creek District

Tourism has emerged as a significant contributor to the economy of Stann Creek; the district accounts for 10 per cent of the Hotels and 17 per cent of the available rooms in the country. In addition, Stann Creek hosts two important archeological Mayan sites, Maintzunun and T'au Witz.

The most important destinations within Stann Creek are the coastal towns of Dangriga, Hopkins, and Placencia.

- ▶ **Placencia** is a world-renowned tourism destination; this town is the most important sun and beach destination in the country, which stretch for over 16 miles of white-sand beaches, hotels, and luxury resorts along the coast. The town also boasts a variety of water-based activities, such as snorkeling, scuba diving, fishing, and kayaking. Additionally, Placencia offers a range of land-based activities such as hiking, bird watching, and exploring the local culture. Placencia is also home to the Monkey River, a popular destination for ecotourism.

- ▶ **Dangriga** is an essential cultural and ecological tourism hub, owing to its rich heritage and unique geographical location. This town is a gateway for expeditions to the southern area of Belize's Barrier Reef, a UNESCO World Heritage site and one of the world's most biologically diverse marine environments. Dangriga is widely considered the spiritual capital of the Garifuna people, which is another attraction for tourists seeking to immerse themselves in the local cuisine and traditions. Additionally, Dangriga boasts essential ecological and historical sites such as the Cockscomb Basin Wildlife Sanctuary, home to the world's only jaguar reserve.
- ▶ **Hopkins Village** is a town that provides a more cost-effective beach destination option than Placencia. Hopkins offers a less crowded environment and is infused with a relaxed Caribbean atmosphere. It has been hailed as the friendliest village in Belize by Belize First magazine and is popular among locals, expatriates, and young tourists. As well as Dangriga, Hopkins offers visitors the opportunity to explore the nearby nature reserves, such as the Barrier Reef and the Cockscomb Basin Wildlife Sanctuary, as well as cultural attractions, such as the Lebeha Drumming Center and the Pen Cayetano Studio Gallery where Garifuna art and music are showcased.

The tourism sector in Stann Creek District faces several challenges, including seasonality, lack of skilled workers, and poor infrastructure³⁴, weak local destination brands in the municipalities (except for Placencia), and limited diversification of tourism products. Furthermore, the COVID-19 pandemic has significantly impacted the tourism industry in the district, resulting in significant job losses and reduced tourism revenues (BTB 2019).

Tourism in the Toledo District

Toledo, located in the southernmost district of Belize, is recognized as one of the less developed areas in the country. Despite this, tourism has emerged as a vital service in the district, employing over 1,200 individuals (SIB 2018). The number of hotels and available rooms remains low but growing, representing only 3 per cent of the country's total (BTB 2017). In recent years, Toledo has become a prominent ecotourism and cultural tourism destination anchored on its rich Mayan heritage.

The district's vast protected areas and wildlife offer abundant opportunities for visitors interested in nature-based activities. Toledo is renowned for being the home of Rio Blanco National Park, a natural reserve with one of the country's largest waterfalls. This park is characterized by its breathtaking cascades and serves as a habitat for a wide range of diverse wildlife. One can encounter fascinating creatures such as jaguars, tapirs, and howler monkeys within its boundaries. Visitors can hike, swim, and explore the region's lush vegetation. Furthermore, Toledo has one of the most extensive caving systems in the country, including the Blue Creek Cave, a spectacular underground cave system that can be explored through guided tours.

The offshore islands, particularly the Sapodilla Cayes, are another attraction for visitors seeking water-based activities, including snorkeling and diving. The tiny islands offer stunning underwater vistas home to marine life.

In terms of cultural tourism, the inland hills of Toledo boast several ancient Maya sites, including Pusilha, Uxbenka, Lubaantun, Xnaheb, and Nim li Punit. These sites feature impressive stone architecture and numerous carved sculptures containing Maya hieroglyphics. Furthermore, due to the area's high proportion of the Mayan population, visitors can engage with local communities and immerse themselves in their traditions. Rural tourism activities, particularly cacao-related ones, are increasingly popular in Toledo. Visitors can also experience Mayan healing practices, which have frequently attracted foreigners. Programmes such as the "Maya homestay programme" enable visitors to live and interact with a Mayan family for several days. Additionally, local communities benefit from the sale of handmade crafts, as

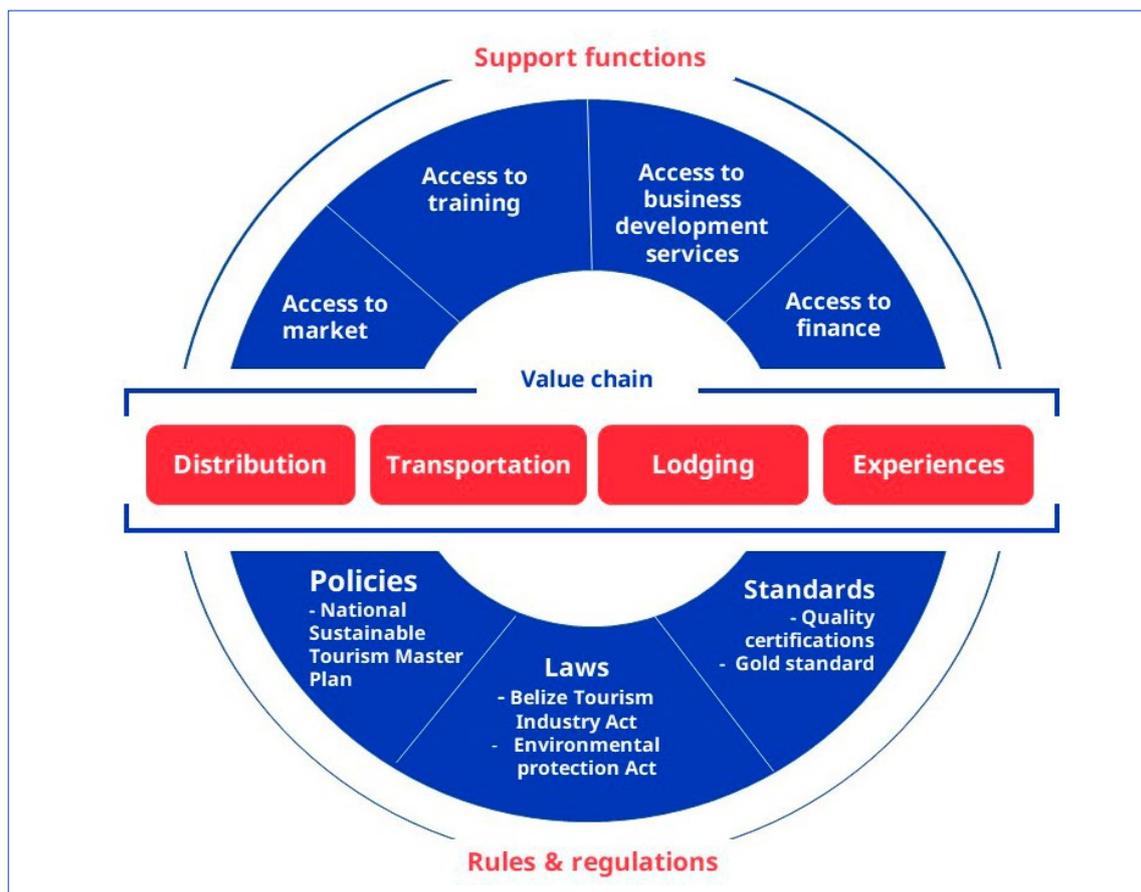
Mayan artisans produce a diverse range of products, including bowls, the famous Jippi Jappa baskets, clothes, and bags.

In order to facilitate the growth of the tourism sector in Toledo, it is imperative to invest in infrastructure, capacity building, and marketing efforts, as well as improving access through public transportation. Additionally, developing human resources through training programmes and education in hospitality and tourism management is critical to ensuring the industry's sustainable development.

Value chain

Figure 2 shows an exemplary market system for sustainable tourism of the value chain in Belize, which includes the supply-demand transactions in the core value chain – from sourcing of raw materials to end consumer – and the 'supporting functions' and 'rules and regulations' that influence how the maker functions.

► **Figure 2. Market system for sustainable tourism**



Source: Author's own elaboration

Distribution

The value chain of the sector begins with the search for tourist offers by the potential traveler; this happens through issuing travel agencies (both virtual and physical); these agencies are nourished by Destination Management Companies (DMCs), organizations that consolidate and curate the offer available in a specific destination and promote it in the issuing agencies, this process is known as

Distribution. DMCs connect issuing agencies, tour operators, hotels, restaurants, and other local services for travel planning, budget preparation, or reservations.

Each link makes increments or commissions to the following link throughout this process. For example, a local guide could offer an excursion to a tour operator for US\$50 with a margin of 15 per cent; the tour operator sells that same excursion to the DMC with an increase of another 15 per cent, and the DMC, in turn, distributes it to the issuing agency with an increase of 15 per cent extra on the price agreed with the local tour operator, and finally, the issuing agency sells it to the final consumer with a margin also of 15 per cent. Under this hypothetical scenario, the final consumer would end up paying a price of US\$76, 52 per cent higher than that offered by the guide³⁵.

This stage shows a high incidence of MSMEs; DMCs and local agencies usually classify in this category. Given the size of the destination, most of the DMCs are not located in Belize but in Europe or other Caribbean countries where the regional operations are consolidated.

The sector is experiencing a change in consumer patterns; more and more tourists are opting for direct purchases through online travel agencies (OTAs) instead of traditional issuing agencies; with this, some intermediaries are eliminated, and the consumer price is usually lower. This shift has slowed the growth of DMCs and issuing agencies, limiting them to specific segments such as corporate trips, Meetings, Incentives, Conference and Exhibitions (MICE), risk-averse tourists, luxury travel, people with limited access to digital services or special interests³⁶.

The special interest segment is relevant to the Stann Creek and Toledo districts, owing to their distinctive cultural and environmental richness. This segment offers ample opportunities for MSMEs to market tours and packages in areas such as bird watching, hiking, archeology, and scuba diving.

Unlike traditional travel agencies, OTAs strongly emphasize destination branding, as search queries primarily drive sales. These destination brands can be national or local, as with Placencia town, which has gained a global reputation. In contrast, the other municipalities within the Stann Creek and Toledo districts need a widely known destination brand; this may lead to inconsistent product offerings, inadequate marketing strategies, and a dependency on the perception of the country's overall brand.

Transportation

Once the trip is planned, the tourist must make the transfer; this activity can be managed by the issuing agency or the client with the different service providers. For value chain mapping, the transport link is illustrated as a post-distribution and pre-accommodation stage; the reality is that the need for mobility occurs throughout the journey so that this activity involves all transfers of visitors to and from their place of origin, as well as within the tourist destination.

Among the main actors in this activity are:

- **International transport (airlines and port services):** They are highly regulated companies, large and usually multinational; the participation of MSMEs in this type of service is practically nil.
- **National tourist transport:** They are highly regulated businesses, both in the quality of the vehicles and the operations' formality. In the case of bus or collective vehicle services, there are generally medium-sized companies that offer services for activities and private tours. In the case of light

³⁵ The percentages usually vary greatly depending on the activity, seasonality, and actors involved. However, in general terms, they stay between 5 and 25 per cent.

³⁶ In tourism, special interest refers to a type of travel experience designed around a particular hobby, activity, or interest of the traveler. These interests include sports, photography, hiking, science, food and wine, history, culture, and art. Special interest tourism aims to provide travelers with an immersive and authentic experience that allows them to pursue their passions while discovering new destinations and cultures.

vehicles, the vast majority of services are provided by cooperatives or independent registered taxi drivers. Existing MSMEs are primarily dedicated to providing service to agencies and tour operators.

- ▶ **Car rental companies:** These businesses are highly regulated both for the vehicles' quality and maintenance. Tend to offer decent jobs. However, due to its environmental impact, sustainable tourists tend to prefer collective transportation over car rentals. However, according to interviews with sector specialists, sustainable tourists have recently shown an upgrowing interest in car rental when sustainable options are available for rent, for example, hybrid or electric vehicles and electric motorbikes.

Transport plays an essential role in the carbon emissions of travelers, and eco-friendly options are likely preferred. This represents an exciting opportunity given the nil competition existing in the low offer of environmentally friendly options of transportation compared with the increasing demand³⁷. However, MSMEs in the Stann Creek and Toledo Districts may need help in providing sustainable transportation services due to the high financial barriers associated with vehicle acquisition, registration, and working capital.

Lodging

This stage includes the activities associated with the accommodation of visitors. In the same way as transport, for value chain mapping, this link is illustrated prior to the Experiences and attractions stage, although both links happen in parallel.

Accommodation preferences in sustainable tourism have evolved over the last decade; the early adopters of sustainable tourism prioritized the sustainability of accommodation over comfort; while this tradeoff is still present in the industry, it has reduced drastically, according to (Expedia 2022), only 43 per cent of current sustainable travelers are willing to do so. Today, sustainable accommodation must offer the same comfort but less environmental impact. This is achieved by modifying service infrastructure (for example, by reusing water, using renewable energy sources, and sourcing from local chains) and ensuring decent working conditions for their employees. According to (Expedia 2022), 74 per cent of consumers would choose a destination, lodging, or transportation option committed to supporting the local community and culture, even if it was more expensive.

While some big resorts exist in the country, most accommodations are small hotels³⁸, there is a wide range of market segments and business models, including:

- ▶ **Boutique hotels:** These operations seek to provide the same standards of service and comfort as a more prominent hotel but with personalized service. Most of the current offer of accommodations in Belize goes into this category. They are usually formal businesses with wide offers ranging from low prices to exclusive and expensive accommodations. In Toledo.
- ▶ **Collective accommodation:** Common options such as inns or hostels are grouped here. These MSMEs are very popular among ecotourism and adventure travelers; they tend to be oriented to low-cost and international tourism (where this accommodation type is common). Some of these accommodations operate exclusively with cash or through room rental platforms such as Airbnb, so the incidence of informality is high.
- ▶ **Rental apartments:** As mentioned above, the sector has experienced a change in consumption patterns, gradually replacing the hotel accommodation service with renting rooms or apartments

³⁷ According to (Expedia 2022), 45 per cent of travelers would prefer to use more environmentally friendly transportation options in their future trips.

³⁸ On average, each accommodation in the country has 9.7 rooms; in Stann Creek District, the number is 7.2, and in Toledo District, 9.1.

in residential areas through technological platforms such as Airbnb. Registration of Airbnb rooms in the BTB is mandatory under the Tourist Accommodation Act.

The transition from conventional to sustainable tourism entails a range of modifications, encompassing the reskilling of current workers and creating new indirect employment opportunities. On the one hand, hotels must adopt new procedures to achieve sustainability, necessitating workers involved in cleaning, laundry, and culinary activities to become proficient in new tools and practices, such as reducing water usage and incorporating local ingredients into menus. Moreover, the demand for environmental-related services³⁹, such as the installation of ecotechnologies, landscaping, and waste management, contributing to job creation and MSMEs entrepreneurship. In addition, butlers and concierges are expected to provide information about nearby sustainable experiences available and detailed information about the environmental and social strategy of the hotel.

The promotion of MSMEs and employment opportunities within the lodging subsector in Belize varies based on region and impact. According to primary sources in Placencia, entering the market as a new player may take much work due to high competition and a high supply of beachfront lodging options, including large resorts. However, there are opportunities for MSMEs to provide environmental services to larger hotels, provided that external factors, such as regulations or shifts in demand, encourage adopting sustainable practices. Currently, sustainable practices may not be a priority for larger hotels.

Primary sources in other targeted destinations such as Dangriga, Hopkins, and Toledo indicate significant participation of mostly family-owned MSMEs. While there is still room for other businesses to enter the market, high investments and working capital requirements associated with owning and operating accommodation businesses create significant barriers to entry. Additionally, existing accommodation has the potential to increase productivity, leading to improved working conditions for employees and the creation of new jobs. To achieve this, credit access and management training improvements are necessary, both of which will be discussed further in the Supporting Functions section.

Toledo is known for its abundance of eco-lodges, many of which use traditional Mayan wood framing techniques in their construction. Given the ease of building cabins and the relatively limited availability of accommodations, there are ample opportunities for MSMEs to establish themselves in the region, either as solo ventures or through partnerships that involve indigenous communities in the construction, maintenance, and operation of lodging facilities. While the idea of an indigenous-owned hotel is not new in Belize⁴⁰ or elsewhere, there is immense potential for further development in this area and exploring associativity to reduce the barriers of entry of vulnerable populations, this approach has proven effective in other regions of the world and is highly appealing to travelers seeking an immersive cultural experience.

Dangriga and Hopkins share similarities with Toledo regarding the limited availability of accommodations and a robust ethnic community presence. However, given their coastal locations, construction methods may be different and more expensive, requiring rental property operations. Nonetheless, these locations offer ample opportunities for MSMEs to establish themselves in the lodging subsector.

Another exciting prospect in accommodation is the increase of special-interest travelers and the consequences of digitalizing distribution channels. This represents a tremendous unexploited opportunity in the lodging sector, where some minor adaptations should be made so that accommodation can adjust to the needs of special-interest travelers. An example of this customization that can be implemented in Dangriga and Hopkins is the dive resorts. This kind of accommodation operates as a hotel with minor changes, for example, offering specialized services (such as filling the air tank, cleaning diving equipment, making reservations with nearby diving centres, or organizing a shuttle to the dive spots), have modified some processes to adjust to their customers (for example change the breakfast or lunchtime to adjust to

39 This includes the installation of eco-technologies, landscaping, sargassums, and waste management.

40 There are several Mayan and Garifuna family-owned accommodations in Hopkins, Dangriga and Toledo.

diving schedules) and have done modifications in the physical infrastructure (have built a tank to clean the equipment or a room to store it). Those minor changes represent a considerable improvement in the experience of travelers. In addition, by getting specialized, MSMEs can easily differentiate from the rest of the offer and access specialized markets. While dive resorts are a good example, some other interest, such as birdwatching and well-being can be explored.

Experiences

This stage integrates the activities that a visitor can perform in the destination. Although it is illustrated within the value chain map as the last link, the activities that integrate it can happen throughout the stay.

There is a wide variety of experiences and attractions, whose classification could be too extensive, for this report will be used only those categories with a greater incidence of MSMEs in the sector, these being:

- ▶ **Bars and restaurants:** Gastronomic establishments throughout the country exhibit a varying range of formality, scale, and managerial sophistication. While no culinary offer is tailored exclusively to tourists, certain bars and restaurants have succeeded in capturing these customers through strategic location placement and effective utilization of digital tourism promotion channels. The transition of restaurants and bars to more sustainable business models implies an increase in local sourcing of ingredients, waste management, and responsible use of energy and water; while these changes may be expensive, they can also represent an increase in the income for the MSMEs, 55 per cent of travelers may be willing to spend more on sustainable food on restaurants (Expedia 2022).

Similar to the lodging industry, primarily family-owned MSMEs play a significant role in the bars and restaurants sector in the prioritized districts of Toledo and Stann Creek, according to primary sources. Despite a moderate offering of bars and restaurants in tourist zones, the concepts and menus tend to be similar, creating the impression of a saturated market. Interviews with tourism professionals reveal that while there is still room for other businesses to enter the market, there are limitations that reduce the willingness of entrepreneurs to undertake endeavors in this activity, including the lack of skilled workers, reduced demand due to the COVID-19 pandemic, and the high costs associated with opening and operating such businesses. Like the lodging industry, the most significant opportunity for creating decent jobs lies in formalizing and enhancing productivity in existing businesses through technical and business training, marketing services, and financing rather than solely opening new businesses.

- ▶ **Commerce:** This activity used to focus exclusively on selling souvenirs and typical products. However, this approach has expanded with the growth in sustainable tourism and short-income apartments. Some establishments that sell consumer goods, medicines, or clothing aimed at the local consumer are beginning to serve foreign customers. For retail businesses, elements such as the use of materials and sustainable packing are essential in the buying decision-making process of sustainable tourists; incorporating upcycling, recycled materials, or unique local offerings is essential. However, it is crucial to consider the increasing awareness of cultural appropriation, which may reduce the interest of tourists in buying traditional souvenirs such as indigenous clothing.

The Government of Belize recognizes the significance of commerce as a potential contributor to tourism revenue. The #planBelize Medium-Term Development Strategy 2022-2026 highlights a project focused on continually establishing cultural centres to market and promote artisanal products. However, except for indigenous groups, Belizean-made handicrafts and traditional products are limited to commercialization (BTB 2011). In the prioritized districts of Toledo and Stann Creek, this presents an opportunity to develop a new upcycling offer of craft souvenirs and establish linkages with other locally sourced agricultural products, such as coffee or snacks.

In Toledo, Dangriga, and Hopkins, there exists a local supply of crafts created by the indigenous population, such as clothing, drums, bags, and baskets. However, these businesses have primarily been informal and lack proper business structures, resulting in common mistakes that can render their operations financially unfeasible over the long term. For instance, artisans often sell similar products in the same markets (e.g., archaeological sites or touristic spots), which leads to competition based on price reduction due to high demand and limited differentiation, thus impacting their income. Such businesses require extensive training, support, community agreement, and organization to establish an efficient shopping experience for tourists.

- ▶ **Wellness services:** This encompasses SPAs, beauty salons, and other related services, representing a distinct niche within the tourism industry. Of the prioritized locations, only Placencia offers a wide range of wellness experiences, primarily within larger resorts. For the rest of the locations, as in previous “experiences”, there are some limitations for new players to come, given the barriers of entry, such as cost and reduced demand. However, there are opportunities to work with current business owners and entrepreneurs to improve their productivity.

Belize’s cultural and environmental attributes provide ample opportunities for local communities in the prioritized districts (Toledo and Stann Creek) to establish wellness services that draw upon indigenous heritage, such as herbalism, traditional healing, or chiropractic. In addition, there is potential to establish connections between local indigenous populations and personal care centres to supply personal care products crafted with local ingredients, such as oils, soaps, or masks.

Wellness services can also play an essential role for specialized hotels in line with the growing trend of special interest tourism and accommodations. Traditional wellness services are not new to indigenous groups in Belize; some larger accommodations offer services such as traditional healing or herbalism as tours. While some efforts have been made to revive Mayan healing traditions and offer them to tourists, these initiatives have often needed more business structures to make wellness services financially viable.

- ▶ **Excursions:** This endeavor is of particular significance, given the prevalence of cruise tourism, which encompasses cultural, sporting, and recreational pursuits. This activity’s ability to include other economic activities is an important feature. For instance, a rural agricultural producer can readily provide tourism excursions such as the cacao farm and Chocolate Factory tour in Toledo, while a typical products factory can furnish guided tours, thereby facilitating diversification in both client and product bases; this has not been exploited widely in the prioritized districts due to a lack of knowledge and training in both, tour operators and business owners.

Excursions offer an excellent possibility for entrepreneurship, considering the low investment needed to start operations. In addition, it is aligned with the tourism vision of Belize of promoting niche markets. However, this should be done to ensure decent work and formalization. This activity transforms consumption patterns, with conventional tours and excursions supplanted by “experiences” marketed through platforms like Airbnb or GetYourGuide. Independent hosts can customize their tourism products, thus enhancing the potential for tailor-made offerings. However, this approach also engenders informality, given that these excursions do not require tourist licenses or business formalization until such activities are regulated.

In Belize, all tour operators must register and fulfill specific requirements, including obtaining third-party liability insurance. This insurance provides financial coverage for accidents or injuries during tours or activities, ensuring that third parties affected can receive adequate compensation. However, this requirement can represent a challenge for MSMEs and entrepreneurs due to the associated costs, making their operations financially unfeasible in the short term. Cooperatives-owned tour operators have not been widely utilized in the prioritized districts. However, they could be a viable option for formalization, particularly given that organized indigenous groups can provide an initial step toward this goal.

Engaging in tours and excursions that cater to special interests presents a significant opportunity for the prioritized districts in Belize. However, acquiring the necessary capabilities to lead such activities cannot be achieved in the short term. Specialists in this type of tourism are typically scarce in the local area. They are often sourced abroad, such as ornithologists for bird watching, professional scuba diving instructors, or archaeologists. Therefore, engaging local communities in this type of tourism requires collaboration and cooperation with external parties and a comprehensive plan to develop local skills over the long term.

Support functions

Access to markets

Access to new markets can be interpreted through two different lenses: firstly, as a means for businesses within the tourism industry to broaden their client base (for instance, a hotel that caters to North American tourists aiming to attract European tourists to its premises), and secondly, as a method for non-tourism sector companies to diversify their operations by offering tourism services (for example, an agricultural producer that seeks to provide rural tourism excursions).

For businesses operating through intermediaries, expanding their client base relies on formalizing agreements with local tour operators or DMCs specializing in the targeted market (for instance, DMCs specializing in the European market). However, as the distribution of tourism is digitalizing, market access is also doing it; digital platforms are substituting intermediaries, and these platforms are segmented too, for example, booking.com for North America or trip.com for Asia.

While no structural barriers impede businesses from approaching new intermediaries or creating an account in a tourism platform in Belize, constraints are limiting, particularly MSMEs, to do it. MSME owners need more space for networking with potential partners (such as tour operators and specialized DMCs). Regarding digital marketing, MSMEs owners need to gain knowledge of specialized marketing or professional operation of digital platforms for tourism. In addition, investments needed for competing in digital platforms, such as professional pictures, videos, and multilanguage community management, tend to be expensive and, in some cases, restrictive for MSMEs.

Owners of MSMEs from non-tourism sectors who seek to incorporate tourism activities into their service portfolios face similar limitations to those experienced by companies operating within the sector. They need to gain knowledge of the operation of tourism activities, potential opportunities, and especially information and guidance in this regard.

Access to training

While some private and public academic institutions offer hospitality-related training, the feedback from both public and private stakeholders is that this needs to be revised, considering the sector's relevance in the economy. This issue directly impacts some of the constraints identified by the NSTMP, such as a lack of good and qualitative tourism services and inadequate (natural and heritage) asset management. It is essential to highlight that creating a specialized training centre is already on the agenda of the Ministry of Tourism.

The ITVET is the primary provider of job training services. This state-owned organization provides certificate programmes in areas such as front office services, hospitality services, food preparation, recreation, and hospitality management. However, there is no specific focus on sustainability.

Another critical player in the sector is the BTB. This statutory body within the Ministry of Tourism functions as a strategic partnership between the Government and the private sector to develop, market, and implement tourism programmes that fulfill the emerging needs of our local industries and international

tourism marketplace. As one of its functions, the BTB certifies tour guides and provides a broad series of free access online training for tourism companies.

In addition to ITVET there is a wide range of national and international private hospitality training service providers. However, access for MSMEs to these training is also limited, given their high costs; private providers of training services, given the market demand, have oriented their offer of services to large customers, which has increased their prices, making them inaccessible to MSMEs.

Access to business development services

Business development services providers in the country are limited, particularly for MSMEs. While consulting firms specializing in business development and management can be located in Belize, their services are typically geared toward large corporations. Moreover, the costs associated with these services tend to be steep, further impeding the access of MSMEs.

The Government is the leading provider of BDS for tourism MSMEs in the country, mainly through three organizations, the Belize Trade and Investment Development Service (BELTRAIDE), the BCCI, and the BTB.

BELTRAIDE is a statutory body of the Government entrusted with the task of promoting and facilitating both domestic and foreign investment and fostering the growth and development of the country's trade and business sectors. BELTRAIDE offers a comprehensive range of services to entrepreneurs and MSMEs, including training, mentorship, and technical assistance (A detailed list of BELTRAIDE services can be found in Appendix 5. However, the level of specialization these centres have in tourism still needs to be improved, particularly in specialized digital marketing through platforms such as TripAdvisor or Expedia, the development of tourism products, which represents the main.

The Belize Chamber of Commerce and Industry (BCCI) provides training and mentoring in entrepreneurship to MSMEs who have become members. In addition, BCCI has put together a list of pieces of training in partnership with the University of the West Indies (UWI), Open Campus Belize, and the Belize Training and Employment Centre (BTEC) for both business owners and professionals and their employees (A detailed list of BELTRAIDE services can be found on Appendix 6.

BTB extends dedicated assistance to MSMEs and aspiring entrepreneurs in the tourism sector. This support is offered through various means, including comprehensive training and certifications, personalized mentorships, and technical guidance on an individual basis.

Business development services are not readily available in the prioritized districts. Although some NGOs and local development organizations occasionally work towards business development or livelihoods, it is not their core activity, and the initiatives need more consistency over time.

Local Governments may also offer specific business development programmes based on their unique needs⁴¹. However, these programmes face several challenges: 1) lack of standardized framework across local Governments; 2) communication at the local level is not optimal, with some municipal Governments lacking a website and relying solely on social media, which limits the reach of the message to the post's availability; and 3) lack of funding⁴². Additionally, local Governments partner with BELTRAIDE to offer BDS at the local level upon request.

⁴¹ Municipal Governments in Belize have the legal power to promote business within their jurisdiction. One of their roles is to create an enabling environment for businesses to thrive by providing infrastructure, services, and regulations that support economic growth. They can also implement policies and programmes that promote investment, entrepreneurship, and local economic development. For example, municipal Governments can provide technical assistance and training to entrepreneurs and small businesses and facilitate access to financing and other resources. They can also work with private sector actors and other stakeholders to identify and promote economic opportunities in their communities, such as tourism, agriculture, or manufacturing.

⁴² Municipal Governments rely heavily on the Government of Belize for subventions, even though the council generates substantial revenue via property taxes, vehicle licensing and registration, and liquor and trade license fees.

► **Table 8. Actors involved in business development services**

Entity	Service provider	Type of outreach
Consulting firms	► Business development, training, and management services	Geared toward larger corporations
BELTRAIDE	► Training and mentorship for entrepreneurs; and ► Technical assistance	National
BTB	► Training and mentorship for entrepreneurs; and ► Technical assistance	National
Belize Chamber of Commerce and Industry (BCCI)	► Training and mentoring in entrepreneurship for MSMEs	National (For members only)
Local Governments	► Small business development programmes based on unique needs often need a standardized framework across local Governments and face challenges in communication and funding. Partner with BELTRAIDE and BTB to offer BDS at the local level upon request.	Local

Source: Author's own elaboration

Access to finance

Even though tourism is an important economic activity in the country, there is limited affordable and accessible credit and financing for MSMEs in the sector. The Government's leading development bank is used for stable and less risky activities within the agriculture sector. It limits the offer to commercial banks, which require collaterals, which can potentially restrict the possibilities with businesses lacking collaterals. In addition, during the last years, the business in the tourism sector has seen its attractiveness as credit subjects reduced due to the uncertainty surrounding the duration of containment COVID-19 measures and speed of recovery.

In addition to the financial options available through traditional banking institutions, alternative institutions such as credit unions exist. Credit unions typically offer enhanced benefits to their members and shareholders. In Belize, credit unions have emerged as a preferable alternative to commercial banks, with several prominent credit unions operating in the country.

These credit unions across the country offers diverse loan options tailored to specific purposes, including personal loans, student loans, real estate, transportation, loans for MSMEs, construction workers, agriculture farms, marine products, manufacturing, building, tourism, forestry, and other types of loans with unique features. The interest rates for these loans vary based on the loan type and repayment period, with rates starting as low as 9 per cent. Additional advantages of credit unions are annual dividends and rebates, loan coverage, life savings coverage on shares based on the threshold defined by the institution, insurance, reduced loan processing fees, lower costs for property appraisals, to name a few. Some credit unions also provide services to rural businesses, offering services such as a rural finance programme, agro-chemical fertilizer services, and a sugar cane replanting and ratoon maintenance programme. Members may benefit from zero-interest rates for one year.

Rules and regulations

Policies

The NSTMP for Belize was developed as part of the Sustainable Tourism Programme. The Cabinet endorsed it in October 2012, and it became the strategic guideline for tourism development in Belize up to 2030. The NSTMP highlights a comprehensive plan for market growth based on five strategies:

- **Few but strong source markets:** The central European source markets (such as German, French, and English) will have been tapped, and a growing stream of high-value European tourists will be visiting Belize. Belizean traditional markets (USA and Canada) will be enhanced and consolidated in mid-high-end segments.
- **Specialized in niche market segments:** Additional market growth will come from consolidated highly specialized market drivers such as cavers, divers, pocket cruisers, honeymooners, yachties, sailors, and adventure seekers, among others.
- **Dynamic cross-border movement:** Increasingly, intraregional travellers will be crossing border points to reach Belize as more and better connectivity is reached, with cross-product synergies to neighbouring countries through such products as the Mayan Heritage Trail, nautical routes as well as shopping and entertainment offering.
- **Domestic travels:** Domestic travel will increase, making the Belizean residents feel and experience the country as it is one of their own tourism World Class destinations.

The master plan divides the country into seven unique destinations that converge in a cohesive offering that makes Belize a distinctive and highly competitive destination. The master plan also provides development strategies for each of the seven destinations.

While a plan update is under revision, its outputs are still valid and currently shape the policies and strategies of the Ministry of Tourism.

Laws

The legal framework governing tourism in Belize is predominantly regulated by the Belize Tourism Industry Act of 2009. Under the purview of this Act, tourism service providers, such as hotels, tour operators, and other tourism-related businesses, are regulated concerning their licensing requirements. They must meet specific standards and guidelines that ensure the safety and satisfaction of tourists.

Apart from the Belize Tourism Industry Act, several other laws and regulations impact the tourism industry in Belize. These include the Hotel and Tourist Accommodation Act, the Environmental Protection Act, and the National Parks System Act, which offer guidance on environmental protection, land use, and managing protected areas.

It is noteworthy that Belize is a signatory to multiple international agreements related to tourism, such as the United Nations World Tourism Organization's Global Code of Ethics for Tourism. These agreements set out principles and guidelines for sustainable and responsible tourism practices, further demonstrating Belize's commitment to promoting environmentally conscious and socially responsible tourism.

The MTCA and BTB manage the tourism sector at the macro level. No entity is directly responsible for tourism management and governance at the local level. Although local Governments exist, such as town and village councils, these bodies need a clear mandate and authority to govern their tourism resources. Town and city councils can only provide rules, good governance, and certain essential services

and promote their destinations (BTB 2017). Local Governments are essential to liaise between local communities, mainly indigenous communities, and other Government of Belize institutions such as the BTB or the MTCA.

Standards

The Belize Tourism Board (BTB) has implemented an extensive phased reopening plan, including a “Tourism Gold Standard Recognition Program” and mandatory regulations. This 9-point programme outlines new guidelines and operating protocols for various segments of the tourism industry, including accommodations, tour operators, standalone restaurants, gift shops, tourism sites, and approved transportation. A Gold Standard entity is defined as one that has diligently adhered to the new safety procedures and prioritizes the safety of its guests.

In addition to these public standards, private standards are associated with sustainable tourism, such as ISO-26000 on Social Responsibility or ISO-14001 on Environmental Management Systems, to name a few. These certifications evaluate compliance with specific requirements associated with good practices. Large companies primarily adopt these standards; although MSMEs can participate in these certifications, the time, effort, and cost required to collect evidence, prepare for audits, and obtain certification are significant, which demands more resources and structure.

Furthermore, MSMEs typically enjoy different direct commercial benefits from certification than large companies do. In the case of large companies, these seals can serve as a differentiator in sales or public bidding processes, providing greater access to customers, primarily corporate customers. This phenomenon is not typically seen in MSMEs, where the change in purchasing intention usually does not justify the effort required for the certification process. According to interviews with sector representatives in the selected districts, there is no specific interest in adopting any of these standards since those certifications are not associated with increased income or flow of tourists at an MSME level. However, they are open to it if they can see a clear link with increased demand.

Opportunities and market constraints

Opportunities

Opportunities	Description
Mainstreaming of sustainable tourism	► Today more than 90 per cent of tourists are seeking some form of sustainable option in their travels (Expedia, 2022).
Increase of awareness of social sustainability	► Travelers prioritize more than just the environment when making travel decisions. Supporting local economies, cultures are considered an equally important aspects of sustainable travel by consumers.
Availability of natural attractions for sustainable tourism in Belize	► Belize possesses an exceptional and diverse range of natural assets, as well as a rich historical background reflected in heritage sites and a diverse blend of ethnic backgrounds, providing a unique experience for visitors.
Increase in the demand for sustainable meals	► 55 per cent of travelers may be willing to spend more on sustainable food in restaurants.

Opportunities	Description
Increase in the demand for special interest tourism	▶ The sector is experiencing a change in consumer patterns, tourists are opting for OTAs instead of traditional agencies. This shift has slowed the growth of DMCs and issuing agencies, limiting them to specific segments such as corporate trips, Meetings, Incentives, Conference and Exhibitions (MICE), specialized agencies. This segment offers ample opportunities for MSMEs to market tours and packages in areas such as bird watching, hiking, archeology, and scuba diving.
Demand for sustainable souvenirs	▶ The scarce Belizean-made handicrafts and commercialization of traditional products and leisure activities open the doors to introduce new sustainable offerings.
Feasibility to leverage in local communities to offer unique wellness services	▶ Mayan heritage includes traditional curing techniques such as herbalism, healing, or chiropractic.
Substitution of intermediaries for accessing new markets	▶ Access to market digitalizing, online platforms are substituting intermediaries; these platforms are segmented too, for example, booking.com for North America or trip.com for Asia.

Market constraints

Market constraints	Underlying causes
Concerns over cultural appropriation of indigenous groups in global tourism	▶ A growing number of critics believe place brands in general and tourist destinations have exploited indigenous groups for the commercial purpose of entertaining visitors.
High incidence of informal and formal MSMEs	▶ 70 per cent of the touristic employment and income in the country, in average accommodation in Belize has 9.7 rooms.
Lack of sufficient and qualitative tourism services	▶ Insufficient training offer on hospitality and sustainability professionals.
Need for integration of local communities into the Tourism Value Chain	▶ Low awareness of tourism benefits and links to markets.
Lack of resilience towards natural disasters and other economic risks	▶ Lack of insurance in MSMEs, vulnerability of roads ⁴³ and infrastructure and limited access to capital.

⁴³ The vulnerability of roads can entail various risks, including the potential for flooding and the disruption of supply chains and tourist flow. If the road is not secure, it may lead to a decrease in visitor demand. Moreover, in the event of an accident, there could be legal liabilities and negative impacts on the destination's reputation.

Market constraints	Underlying causes
Dependence on fossil fuel transportation	<ul style="list-style-type: none"> ▶ Sustainable tourists have shown an upgrowing interest in car rentals when there are sustainable options available for rent, 45 per cent of travelers would prefer to use more environmentally friendly transportation options in their future trips.
Low participation of other economic activities (such as agriculture or local manufacturing) in tourism	<ul style="list-style-type: none"> ▶ Lack of knowledge and training in both tour operators and business owners.
Lack of regularization in “platform based tours and experiences”	<ul style="list-style-type: none"> ▶ Conventional tours and excursions are being supplanted by “experiences” marketed through platforms such as Airbnb or GetYourGuide, thus enhancing the potential for tailor-made offerings. However, this approach also engenders informality, given that these excursions only need tourist licenses or business formalization once such activities are regulated.
Lack of resources to compete in digital platforms	<ul style="list-style-type: none"> ▶ MSMEs owners need to gain knowledge of specialized marketing or professional operation of digital platforms for tourism. In addition, investments needed for competing in digital platforms, such as professional pictures, videos, and multilanguage community management, tend to be expensive and, in some cases, restrictive for MSMEs.
Lack of specialized training	<ul style="list-style-type: none"> ▶ While there are some private and public institutions offering hospitality-related training, the feedback from both public and private stakeholders is that more is needed. This issue directly impacts some of the constraints identified by the NSTMP, such as a lack of good and qualitative tourism services and inadequate (natural & heritage) asset management. ▶ Even with increasing training availability, some MSME owners cannot attend. Given their business’s size, attending classroom training was only possible due to time restrictions.
Limited access to business development services providers	<ul style="list-style-type: none"> ▶ The availability of BDS providers in the country is limited for MSMEs. Consulting firms specializing in tourism are typically focused on larger corporations. Moreover, the costs associated with these services tend to be steep, further impeding the access of MSMEs.

Recommendations for intervention

Enhance BTB's capacity to develop skills for tourism workers and MSMEs	
Activities	
<ul style="list-style-type: none"> ▶ Develop a prospective occupational skill needs study for the tourism sector. ▶ Foster connections with international cooperation organizations and academic institutions to facilitate the development of a curriculum that aligns with the identified skills demand. ▶ Strengthen the local capacity of BTB and ITVET to create online training and mentoring programmes, addressing time and connectivity constraints. 	
Potential partners for intervention	
<ul style="list-style-type: none"> ▶ BTB ▶ BCCI ▶ BELTRAIDE ▶ Ministry of Economic Development 	<ul style="list-style-type: none"> ▶ University of Belize ▶ ITVET ▶ UNWTO ▶ ILO
Strengthen the resilience in tourism MSMEs	
Activities	
<ul style="list-style-type: none"> ▶ Conduct a resilience analysis to identify the main gaps and vulnerabilities in MSMEs about natural and economic risks. ▶ Strengthen the capacity of BDS providers by adjusting the contents and improving the methodological offer of business resilience. 	
Potential partners for intervention	
<ul style="list-style-type: none"> ▶ BTB ▶ BCCI 	<ul style="list-style-type: none"> ▶ BELTRAIDE ▶ ILO
Professionalize the management skills of the owners of MSMEs and entrepreneurs in the sustainable tourism sector	
Activities	
<ul style="list-style-type: none"> ▶ Strengthen the capacity of BDS providers by adjusting the contents and strengthening the methodological offer of entrepreneurship training (consider the ILO methodologies of "Start and Improve Your Business" and "GET Ahead"). ▶ Develop customized business guides describing the expected business performance, process, access to market and potential vendors. 	
Potential partners for intervention	
<ul style="list-style-type: none"> ▶ BELTRAIDE ▶ BMDC ▶ BCCI 	<ul style="list-style-type: none"> ▶ BTB ▶ ILO

Professionalize digital skills in MSMEs and BDS providers, emphasizing the use of social networks and digital channels specialized in tourism

Activities

- ▶ Partner with popular platforms in the target markets (North America and Europe) to strengthen the capacity of BDS providers in digital marketing, brand positioning, and community management.
- ▶ Promote entrepreneurship of low-cost marketing agencies specialized in digital channels for tourism.
- ▶ Develop local capacities in BDS providers to develop online training and mentoring programmes to tackle the time and connectivity restrictions.

Potential partners for intervention

- | | |
|-------------|--------|
| ▶ BTB | ▶ BCCI |
| ▶ BELTRAIDE | |

Establish a standard recognition programme on sustainability for sustainable businesses

Activities

- ▶ Leverage on the knowledge acquired implementation of Gold Standard to establish a standard recognition programme on sustainability for the tourism business.
- ▶ Create detailed guides with protocols on sustainable management for different kinds of tourism-related businesses.

Potential partners for intervention

- | | |
|-------------|------------------------------------|
| ▶ BTB | ▶ Ministry of Economic Development |
| ▶ UNWTO | ▶ ILO |
| ▶ BELTRAIDE | |

Articulate with external parties to develop particular interests and value-added services

Activities

- ▶ Facilitate collaboration between established professionals in fashion design, music, and culinary arts and local MSMEs and indigenous organizations to promote cultural activities and receive training.
- ▶ Foster a partnership between local communities and professionals in special interest tourism to create specialized tourism business models.
- ▶ Create a comprehensive plan for developing local capabilities in various fields to decrease reliance on external parties for special-interest tourism in the long run.

Potential partners for intervention

- | | |
|-------------|---|
| ▶ BTB | ▶ Ministry of Economic Development |
| ▶ UNWTO | ▶ Ministry of Human Development, Families and Indigenous Peoples' Affairs |
| ▶ BELTRAIDE | ▶ ILO |

Promote entrepreneurship in Belizean-made handicrafts based on upcycling or recycling materials	
Activities	
<ul style="list-style-type: none"> ▶ Partner with large accommodations and local destinations to hosts and ideally invest in workshops on recycling waste materials on premises. ▶ Partner with professional designers, local craftsmen, and craftswomen (including indigenous groups) to develop local handicrafts based on traditional handicrafts. 	
Potential partners for intervention	
<ul style="list-style-type: none"> ▶ BTB ▶ UNWTO 	<ul style="list-style-type: none"> ▶ BELTRAIDE ▶ ILO
Strengthen the capacity of local indigenous communities to develop wellness tourism products	
Activities	
<ul style="list-style-type: none"> ▶ Supporting the indigenous cooperation initiatives to document, train, and promote decent livelihoods based on indigenous heritage, such as herbalism, traditional healing, or chiropractic, is a priority. ▶ Partnering with wellness tourism professionals to develop integrated products, such as tours, commercialization of products, or routes, based on indigenous heritage. 	
Potential partners for intervention	
<ul style="list-style-type: none"> ▶ BTB ▶ Ministry of Human Development, Families and Indigenous Peoples' Affairs 	<ul style="list-style-type: none"> ▶ Ministry of Economic Development ▶ UNWTO ▶ ILO
Strengthen the capacity of local indigenous communities to develop agro-tourism circuits	
Activities	
<ul style="list-style-type: none"> ▶ Train agricultural producers to diversify their operations by incorporating agro-tourism circuits. ▶ Provide technical support for the development of appropriate digital distribution channels. ▶ Connect farmers with tour operators, transporters, hotels, and other stakeholders in the system to integrate them into the value chain. 	
Potential partners for intervention	
<ul style="list-style-type: none"> ▶ BTB ▶ Ministry of Agriculture ▶ Ministry of Human Development, Families and Indigenous Peoples' Affairs 	<ul style="list-style-type: none"> ▶ Ministry of Economic Development ▶ UNWTO ▶ ILO

Prevent potential risks on claims of cultural appropriation	
Activities	
▶ Developing standards and protocols to prevent cultural appropriation in tourism activities and communications involving indigenous groups is critical to promote responsible and respectful tourism practices.	
Potential partners for intervention	
▶ BTB ▶ BCCI ▶ Ministry on Human Development	▶ Ministry of Economic Development ▶ Ministry of Labour ▶ ILO
Promote the creation of cooperatives in the sector	
Activities	
▶ Strengthen the capacities of the Government institutions and social civil associations to sensitize the community about the potential benefits of cooperatives by developing a communication campaign showing successful examples in the region.	
▶ Strength the capacity of BDS providers by adjusting the contents and strengthening the training and methodological offer on cooperatives management (consider the ILO methodology of “My. Coop”)	
▶ Promote, through business associations, indigenous associations, and existing agricultural clusters, the development of production cooperatives.	
Potential partners for intervention	
▶ BTB ▶ ILO ▶ Ministry of Human Development ▶ Ministry of Economic Development ▶ Ministry of Agriculture	▶ Resilient Rural Belize Programme (RRB) ▶ BCCI ▶ NTUCB ▶ BELTRAIDE

Processing of dried and dehydrated fruits

Market overview

Dried and dehydrated fruits are a popular snack alternative to high-calorie, high-sugar options and can be consumed alone or incorporated into trail mixes, granola bars, and other consumables. The advantage of dried fruit lies in its prolonged shelf life, making it convenient for storage and transportation.

This sector has undergone a period of rapid expansion within the last decade. The adoption of healthier lifestyles among consumers, particularly in developed countries, has increased their awareness of nutrition and subsequently led to an upsurge in the consumption of nutrient-dense foods and healthy snacks globally. As a result, there has been a 30 per cent increase in demand for dehydrated fruit over the past decade, valued at US\$2.98 billion (CEPII 2021).

Belize has been minimally involved in the global trade of dried fruits. Nonetheless, the country boasts of advantageous environmental and market conditions that present the potential to establish its significance in the tropical dried fruits sector. The nation has secured its position as a producer of organically grown and sustainable agricultural commodities, which hold considerable demand within the global dried fruit market. Further, Belize has entered into several trade agreements, such as the CARICOM and Central America, thus enabling its entry into both regional and international markets.

The opportunity for tropical dried fruits

Although the current activity level in this sector is still in its early stages, the Government of Belize (GOB) has developed a strategic vision to facilitate the growth and success of the rural-based agro-processing MSME sector. This initiative aims to establish it as a viable and prosperous entity with the potential to function as an export-oriented sector that will replace the export of commodities such as fresh fruits with high-value products. This approach aligns with the objectives in the #planBelize Medium-Term Development Strategy 2022-2026. It has the potential to significantly increase the country's revenue while also creating high-quality employment opportunities in rural areas.

The promotion of this activity carries with it additional economic and environmental benefits. For example, fruits that are typically unsuitable for export due to their physical appearance⁴⁴.

which would otherwise be discarded or sold at reduced prices in the domestic market, can be transformed into a valuable commodity for export through dehydration. Furthermore, the conventional drying methods in this industry generate relatively low carbon emissions, and even the more technologically advanced operations can be sustainable if powered by renewable energy sources. This has the potential to provide access to sustainable niche markets, which can yield significant economic advantages.

The GOB has significantly emphasized the agriculture and food sector as a critical driver for economic transformation. In addition, the #planBelize Medium-Term Development Strategy 2022-2026 outlines a series of projects that are directly related to dehydrating foods:

- Capacity building for staff and processors (including women's and youth groups in product development/ production and value-addition of fruits and vegetables.
- Duty exemptions on priority packaging and labelling equipment, climate-smart technologies, and essential agro-processing equipment
- The training of 20 officers and 20 processors in product development and chimney solar dryer use to produce dehydrated root crops, fruits and vegetables.

In this regard, the National Agro-Processing and Food Production Strategy (2019-2023) has identified agro-processing and food production as key areas for development. To support this strategy, the Ministry of Agriculture, Forestry, Fisheries, and Sustainable Development (MAFFSD) leverages the CFAPU, which started as a pilot project in 1999 in collaboration with the Republic of China, and the Taiwan Technical Mission in Belize. The main objective of the CFAPU is to provide training and technical assistance for creating and expanding MSMEs. The unit focuses on product research and development for transforming

44 Cosmetic specifications such as size, shape, and colour are among the most common causes of food waste in international supply chains (Feedback, 2017).

local produce into value-added agricultural products and transferring technology for agro-business development to improve income generation and food security.

The main activities performed by the CFAPU include training in the areas of food safety and quality, Labelling, and Packaging of products, quality control checks and laboratory tests, advisory in agro-based processed products, and engagement with MSMEs in processing agricultural commodities.

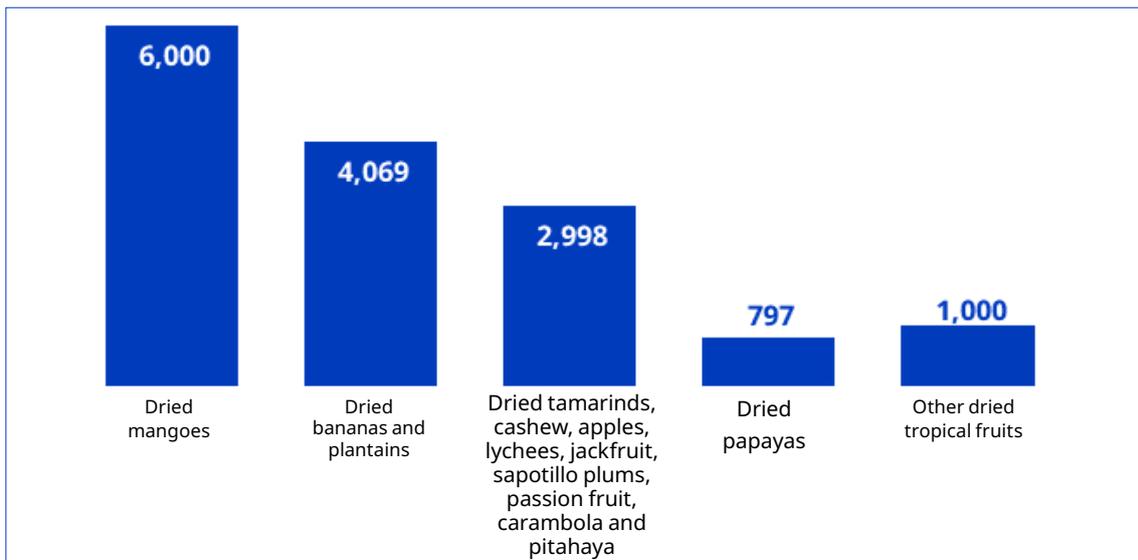
Although the CFAPU has a history of drying agricultural products, the focus has been on producing tuber flours for local consumption⁴⁵, rather than tropical fruits. Furthermore, the CFAPU possesses only one industrial dryer, which requires viable product consolidation from MSMEs.

The MAFFSD, in its 2017/2018 Strategic Planning exercise, identified seven strategic objectives for the CFAPU, to which drying is closely related with five. They are:

1. Minimize food loss and increase farmer household income through value addition (with target commodity of soursop and vegetables).
2. Increase income through value addition (with the target commodity of coconut).
3. Minimize the waste of local banana.
4. To Support the development of value-added pineapple value-added products.
5. To support emerging agro-processors in product development.

The EU constitutes the most extensive prospective market for dried fruit export, with an estimated import volume of 25-30 thousand tons of dried tropical fruits. Dried mangoes account for approximately 40 per cent of total dried tropical fruit imports to Europe. Over the medium-to-long term, a stable growth rate of 5-6 per cent in volume per year is anticipated for the European, dried tropical fruit market. (CBI 2021).

► **Graph 15. Estimated European import of dried tropical fruit from developing countries by product**



Source: (CBI 2021)

⁴⁵ Once dehydrated, tubers (such as cassava or plantain) can be ground into flour using a grinder. This could represent another line of business.

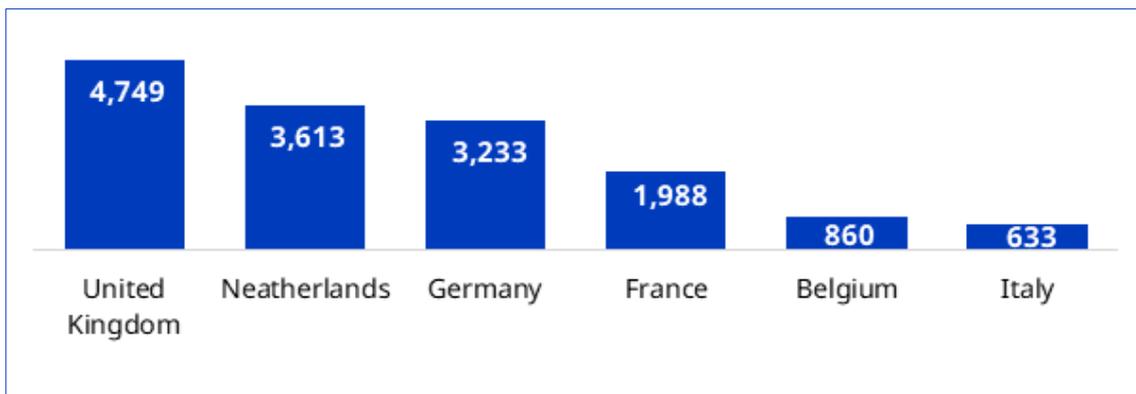
The escalating desire for sustainable products represents a pivotal characteristic of the European market. Organic food sales are gaining prevalence in the European market, with the current market share of the organic segment of processed fruits and vegetables averaging approximately 5 per cent. Although fair trade-certified products continue to constitute a niche market, they progressively expand each year. As of 2021, a meager 134 companies had secured fair trade certification in the dried fruits segment. This limited competition presents a compelling opportunity for potential market entrants (CBI 2021).

The UK stands as the leading importer of tropical dried fruit in Europe, with an estimated consumption of 5,000 tons (CBI 2021). Among the most popular products in the market are dried mangoes and dried tamarinds. The principal suppliers of dried tropical fruit to the UK are Burkina Faso (organic dried mangoes), Ecuador (banana chips), Ghana (dried pineapples, dried mangoes), India (dried tamarinds), the Philippines (dried mangoes, banana chips), South Africa (dried mangoes), and Thailand (dried pineapples, dried tamarinds). This scenario represents a significant opportunity for Belize. The country has the potential to offer several competitive advantages compared to the UK's primary suppliers. These advantages include its proximity (in contrast with other producers such as Ecuador, Thailand, or the Philippines) and the trading benefits that arise from being a member of the Commonwealth of Nations.

The Netherlands ranks as the second most significant European importer of domestic consumption and re-exporting of dried fruits. The country is the largest importer of dried bananas, specifically banana chips, with Ecuador being the primary supplier. 2019 the Netherlands imported 2.2 thousand tons of dried bananas, representing over half of European imports. The importation of organic tropical fruits in the Netherlands is relatively high, with Tradin Organic, one of Europe's most prominent specialized organic importers, leading the way. (CBI 2021).

Germany is Europe's third most significant importer of dried tropical fruit and the second largest consumer in the region, following the United Kingdom. With the exclusion of dried tamarinds, which are not typical snack products, Germany has become the largest consumer of dried tropical fruit in Europe. The country presents an attractive market for organic dried tropical fruit, as it is the largest market for organic food in Europe. Additionally, there is an increasing demand for sugar-free and preservative-free dried tropical fruit products.

► **Graph 16. Main European importers of tropical fruit**



Source: (CBI 2021)

Opportunities in the blue economy of dried seaweed

Seaweed, a type of marine algae, thrives in oceanic environments intentionally cultivated and harvested for its utilization as a valuable food source, which represents a promising opportunity for export as a versatile product. The escalating recognition of seaweed's health advantages and its expanding commercial applications have contributed to the significant growth of the global seaweed market. The demand and recognition of seaweed are witnessing significant growth, particularly dehydrated seaweed, which has been adopted as a healthy snack.

At a global level, the dried seaweed market size was worth around US\$14,000 million in 2021 and is predicted to grow at a compound annual growth rate of 9.10 per cent between 2022 and 2030 (ZMR 2023). This substantial growth trajectory positions seaweed as one of the most promising products within the seafood industry.

Belize's coastal geography and favourable environmental attributes position it as an exceptional site for cultivating and drying seaweed. With extensive coastal areas that are conducive to seaweed farming, the country possesses a notable advantage for fostering the industry's expansion. While specific production data for seaweed in Belize is currently unavailable, the investigative process has revealed that the artisanal drying of seaweed is already in Stann Creek. In addition, the #planBelize Medium-Term Development Strategy 2022-2026 outlines an as project Development of new industries in the marine and coastal areas (i.e., seaweed, fish processing, and others)

As part of a fishery reform effort at the national level, the Nature Conservancy (TNC) is working with fishing communities in Belize on a pioneering sustainable seaweed aquaculture project, becoming the link between conservation and improved local income. This new alternative for conservation and production enables the regeneration of fisheries stocks because it provides a diversified economy for the local population without overexploiting its natural resources (The Nature Conservancy 2022)

The US is a major importer of seaweed, with imports exceeding US\$95 million in 2019 alone. While the majority of these imports come from countries like Korea and China, Belize has a unique advantage due to its proximity to the US market. This presents a significant opportunity for Belize to offer competitive conditions compared to Asian exporters in the seaweed industry.

The UK serves as the primary importer of seaweed in Europe while also witnessing a significant rise in local seaweed production. In 2019, the UK imported 6,271 tonnes of seaweed valued at US\$12,846, reflecting a decrease compared to the 2018 imports of 7,644 tonnes valued at US\$16,531. The demand for seaweed in the UK is driven by the dynamic culinary landscape as well as the increasing adoption of veganism and vegetarianism. As well as with tropical fruits, Belize has the potential to provide better conditions when compared with other exporters to the UK, given the trading benefits that arise from being a member of the Commonwealth of Nations.

France has established itself as the second-largest importer of seaweed, maintaining this position over time. Between 2017 and 2018, seaweed imports into France experienced a modest 5 per cent growth, increasing from 2,869 tonnes to 3,034 tonnes. France's extensive coastline and deep-rooted fishing heritage have cultivated a strong cultural affinity for the consumption of wild seaweed, particularly in the Brittany region.

Same as dried tropical fruit, Germany was the third-largest importer of edible seaweed in 2019. Seaweed imports from Germany reached 1,332 tonnes in 2020. Same as the UK, Germany's growing demand for seaweed comes from its interest in organic products and veganism.

Stann Creek as a hub for dehydrating foods

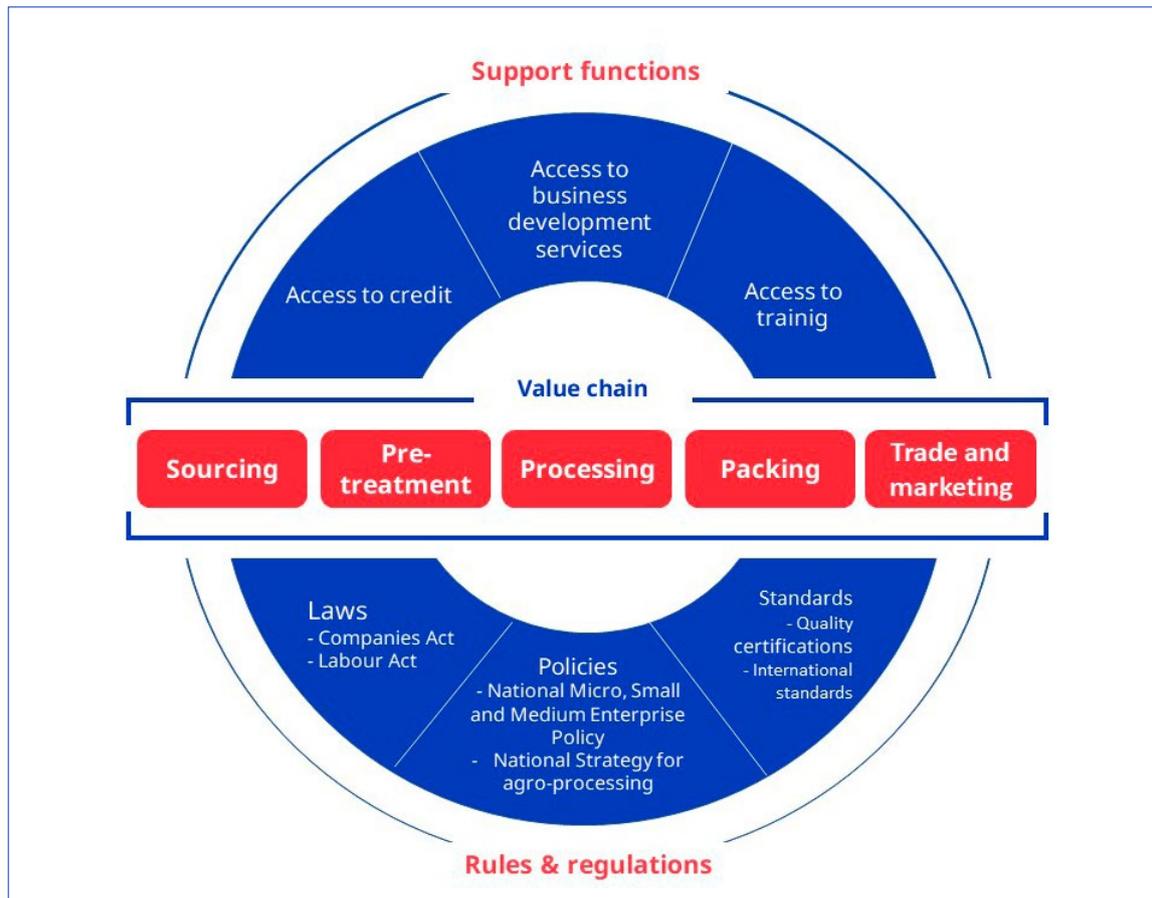
While dehydrating food is not a mature industry in Belize, the conditions of the country and particularly of the district of Stann Creek make it very feasible to develop it as a successful export business in line with the #planBelize Medium-Term Development Strategy 2022-2026. Stann Creek district is home to 997 farms and around 1007 farmers (BAIMS 2023). Most of these farms consist of banana, citrus, and Mangoes and aquaculture (including seaweed).

Also, the port of Big Creek or Cala Grande, in the Stann Creek district, it is the country's second-largest deep-water port and a central shipping facility; most of the products produced in the district are exported in this port (DLCA 2021). In 2016, exports of citrus products totaled BZ\$1.4 million, which is 5.3 per cent of Belize's GDP (SIB 2023).

Value chain

Figure 1 shows an illustrative market system for the processing of dried and dehydrated fruits value chain in Belize, which includes the supply-demand transactions in the core value chain – from sourcing of raw materials to end consumer – and the 'supporting functions' and 'rules and regulations' that influence how the maker functions.

► **Figure 3. Market system for processing dried and dehydrated food**



Source: Author's own elaboration

Sourcing

The procurement of raw materials, specifically fresh fruits, is intricately linked to the business model adopted by dried fruit companies. Generally, there exist three distinct sourcing models:

- ▶ **Self-sourced:** This model involves companies that possess vertical integration and operate both farming and drying operations. Consequently, they rely on their crops to source raw materials, resulting in lower production costs and greater profits. However, this business model may result in idle time and assets as the infrastructure required to process fruit typically operates seasonally. To mitigate this, companies may choose to rent professional dehydration equipment, which could increase production costs, or rely on sundry traditional methods that are less efficient and weather-dependent unless they possess a large polyculture farm.
- ▶ **External sourcing:** This model is used by companies that exclusively focus on food processing. Such operations usually source their raw materials from local producers. Although production costs are higher compared to the self-sourced model, these companies can remain profitable by procuring fruits that do not meet cosmetic specifications or are close to their peak of maturation, which are typically less expensive. Due to a steady flow of raw materials, these companies are more likely to invest in dehydrating machines.
- ▶ **Multiple sourcing:** This model involves a combination of internal and external sourcing. It results from maximizing the utilization of equipment and infrastructure in a self-sourced operation. This model tends to be the most cost-efficient but requires a significant investment due to the size and complexity of its operations. As a result, it is less commonly utilized by MSMEs.

The sourcing process is a crucial aspect of achieving a high-quality product. However, it does not have a direct correlation with job creation. In MSMEs, the owner or partners typically manage the sourcing and inbound transportation activities

The agricultural sector in the Stann Creek District is fueled by producing bananas and several fruits like mangoes and oranges. In 2018, the Stann Creek District had a total of 4,160 agricultural workers; this includes individuals who were self-employed in agriculture and those employed by others in the agricultural sector (SIB 2022).

Since only small and medium-sized producers focus on these products, it would be ideal to adopt the self-sourced model for family and industrial farms. The external sourcing model could be a way for entrepreneurs or for those people that do not have access to land (Women and youth population). Finally, multiple sourcing has potential while not mango season since it has advanced equipment and infrastructure.

Pre-treatment

This stage involves preparing the fresh fruit material for drying. The steps involved in this preparation can vary depending on the company's fruit variety, process, size, and technology. However, the typical steps for small operations include:

- ▶ **Sorting and grading:** This stage involves a thorough quality inspection of the fresh fruits, during which any substandard or damaged fruits are identified and removed from the batch. This process may be carried out through visual examination. It may also be subject to specific grading standards mandated by certain markets, which consider various factors such as fruit variety, sugar levels, and other quality parameters.

- ▶ **Washing:** In this stage, the fruit is subjected to a cleaning process to eliminate any dirt, debris, or external contaminants that may have accumulated during harvesting. The washing process can utilize warm water or other solutions to enhance the safety and shelf life of the final product.
- ▶ **Blanching:** In this stage, the fresh fruit is subjected to a brief boiling or steaming process to soften the skin and eliminate residual enzymes or microorganisms that may negatively impact the final product's quality. Blanching is also beneficial in maintaining the fruit's colour and texture throughout the drying process.
- ▶ **Pitting or slicing:** Prior to drying, certain fruits may require pitting or slicing to maintain consistency in texture and flavour, as uneven sizes can result in inconsistencies. This is particularly critical for high-moisture fruits, such as mango or pineapple. Although manual processing is feasible, large-scale operations may benefit from specialized machinery.
- ▶ **Fruit treatment:** During this stage, some fruits may undergo treatment with preservatives such as citric acid, ascorbic acid, or potassium sorbate to prolong shelf life and prevent spoilage. Furthermore, products such as papaya or coconut may be infused with syrup, honey, or sugar to enhance sweetness or alter flavour.

This stage of fruit preparation is known to be labour-intensive. For self-sourced operations, this entails the recruitment of seasonal labourers, considering that the drying process occurs solely during the harvesting season. In contrast, these tasks contribute significantly to job creation for external and multi-source operations. The tasks involved in this stage do not require skilled labour. Nevertheless, the effectiveness of workers in tasks such as washing or slicing may be enhanced substantially if they are permanent workers as opposed to seasonal ones.

Each of the processes involved in the pre-treatment of the fruit is skill and work characteristic that the workforce available in the Stann Creek district has. According to interviews with Garifuna community members, fruit processing activities have a cultural link with the role of women in society in the Garifuna society and particularly in Dangriga; this factor would represent fewer obstacles to the inclusion of women in these activities.

Processing

This process involves removing the water content from the fruits to prevent spoilage. The dehydration of the fruit can be achieved through various technologies, from handcrafted small solar dehydrators to industrial dehydrators based on gas or electricity. Each method has its advantages and disadvantages, depending on the type of fruit, the desired end product, and the scale of production. It is important to highlight that small operations can be started with minimum investment and progressively increase their capacity by adopting new technology and drying methods.

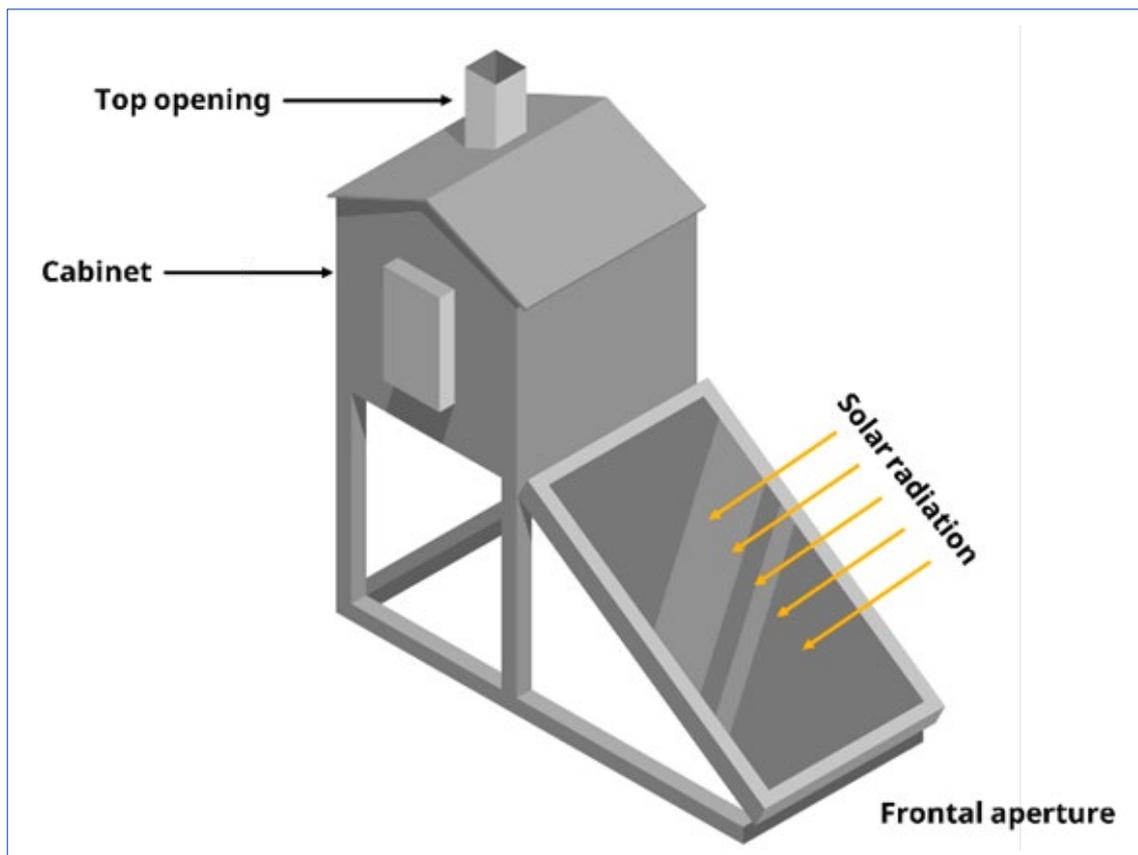
Considering both the environmental conditions in Belize and the opportunity to commercialize products with low carbon footprints in Europe, this report will focus exclusively on sustainable technologies and processes, which result in two different approaches: indirect solar dehydration and direct solar dehydration.

Indirect solar dehydration

This model requires solar dehydrating machinery, which can be either homemade or industrial-grade equipment with advanced technology. Regardless of the type of equipment used, the fundamental principles of air drying remain consistent. Generally, this equipment comprises two components: a cabinet where fruits are placed on trays constructed with metal grids for drying and a horizontal or

diagonal drawer featuring a frontal aperture that serves to receive solar radiation and concentrate temperature. The air that passes through the opening becomes concentrated in the drawer and, as a result of the gradient, rises through the shelves into the cabinet. This air removes the moisture from the food, and the humid and warm air exits through an opening at the top of the dehydrator, ensuring a perpetual airflow. To ensure optimal performance, these machines must be hermetically sealed, protecting the fruit from contact with insects or other animals, and located in arid environments to prevent humidity in the incoming air.

► **Figure 4. Basic structure of a solar dehydrator**



Source: Dmitry Kovalchuk at shutterstock.com with Author's own elaboration

These machines have the potential to be manually crafted by individuals with basic carpentry skills and at a low cost, facilitating their rapid deployment on smallholder farms. However, the absence of manufacturing standards could pose health risks or impede exportation, mainly to developed markets like the EU, where regulations mandate using food-grade materials in production processes.

Another option to consider is the use of semi-industrial equipment. Currently, the market offers a variety of semi-industrial dehydrators with prices ranging from US\$1,000 to US\$2,000 and a capacity of approximately 10 to 20 kilograms⁴⁶ of drying per batch. This equipment uses food-grade materials and often incorporates photovoltaic cells, which can expedite drying by powering internal ventilation systems. These systems allow temperature and humidity control and reduce reliance on wind. In addition, these dehydrators can achieve higher temperatures and consequently are suitable for manufacturing tuber flours.

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The capacity can vary depending on the type of fruit.

Finally, industrial-grade equipment can handle large volumes of product, ranging from 100 kilograms in their most basic versions. This type of equipment is recommended for exclusive use by businesses with significantly high operations and stable demand.

► **Figure 5. Types of dehydration equipment**

Manually crafted equipment



Source: Terra incognita at shutterstock.com

Semi-industrial equipment



Source: Wasanajai at shutterstock.com

Industrial equipment



Source: Ministry of Agriculture, Food Security and Enterprise, Agroprocessing Unit, Central Farm, Cayo District, Belize

The level of workforce required during this stage is low. Installation of the equipment, except for industrial-grade machinery, does not necessitate specialized technical expertise or significant

maintenance efforts. The tasks associated with drying primarily involve arranging cut fruit on trays, rotating them, and continuously monitoring humidity and temperature conditions.

Direct solar dehydration

This production model utilizes an enclosed structure akin to a greenhouse, which captures solar radiation and retains heat. This results in elevated temperatures, leading to increased moisture evaporation rates from the fruit. To enhance efficiency, fruits can be placed onto stainless steel tables, raising the temperature and accelerating the drying process.

To ensure uniform drying, it is essential to periodically turn and rotate the fruit, exposing all sides to sunlight and warm temperatures, resulting in even and consistent drying. The temperature and humidity levels inside the greenhouse must be closely monitored to guarantee proper drying, as higher temperatures and lower humidity levels can hasten the process. However, the efficacy of this drying system is significantly influenced by weather conditions, making it a viable option only in regions where solar radiation remains constant throughout the year.

Unlike indirect dehydration, it is possible to stall a micro-drying greenhouse. However, the costs will be similar to building manually crafted indirect solar drying equipment but less efficient in capacity. Nevertheless, for medium to large-scale operations, this system may be less expensive than purchasing industrial solar drying equipment.

As far as employment is concerned, unskilled labour is required to monitor humidity and temperature and place and rotate fruits on tables and trays, generating similar demand as in the case of a solar dehydrating system.

► **Figure 6. Direct solar drying facility**



Source: PixHound at istockphoto.com

Packaging

After drying, the fruit is weighed and packaged. Adequate packaging plays a crucial role in determining the profitability of production. This is due to the costs incurred in acquiring the necessary packaging materials and its impact on export logistics.

Typically, food products have different levels of packaging. The first level is the one that comes into direct contact with the product, which must be food-grade packaging. The second level of packaging is purely visual, where product information and branding are presented; it is possible that the primary packaging can be printed to display product and brand information, which would eliminate the need for a second packaging but increase the prices. Finally, there is a third level of packaging used for transportation and export, which must be designed considering the product's volume, ensuring maximum efficiency in the use of space and, consequently, lower transportation costs. For export markets, the second and third levels of packaging must adhere to rigorous procedures and documentation to ensure product traceability.

This stage is recognized for its labour-intensive nature, with packaging in external and multi-sourced operations playing a significant role in job creation. The tasks involved in this stage are relatively easy labour. For self-sourced operations, dried fruits can be stored appropriately and packed during a low-workload season to avoid recruiting seasonal workers.

It is crucial to note that this process must occur in a hygienic and protected environment to prevent the presence of microorganisms or insects. Although manual labour typically suffices for this task, workers may require specialized equipment such as vacuum packing machinery for large-scale production.

Trading and marketing

The final stage in the value chain involves the distribution of the dried fruit to the end consumer. To enable sales to international markets, compliance with regulations, including registration and permits from food authorities, private audits from shoppers, or adoption of quality systems, is mandatory. This represents a significant limitation for MSMEs, as some associated costs may be prohibitively expensive. For instance, laboratory testing of the products or certification of the packaging facility can be restrictive for such entities.

Employment generated in this stage is primarily indirect, emanating from legal offices and international trade agencies. If a company decides to establish a brand to market its products, only a limited amount of employment is required for marketing activities. Moreover, as previously mentioned, the Stann Creek District has the port of Big Creek or Cala Grande, the country's second-largest deep-water port and a central shipping facility.

Support functions

Access to business development services

Business development services providers in the country are limited, particularly for MSMEs. While consulting firms specializing in business development and management can be located in Belize, their services are typically geared toward larger corporations. Moreover, the costs associated with these services tend to be steep, further impeding the access of MSMEs.

The Government is the leading provider of BDS for processing food MSMEs in the country, mainly through two organizations, the Belize Trade and Investment Development Service (BELTRAIDE) and the Ministry of Agriculture.

BELTRAIDE is a statutory body of the Government of Belize entrusted with the task of promoting and facilitating both domestic and foreign investment and fostering the growth and development of the country's trade and business sectors. BELTRAIDE offers a comprehensive range of services to entrepreneurs and MSMEs, including training, mentorship, and technical assistance (A detailed list of BELTRAIDE services can be found in Appendix 5). Additionally, BELTRAIDE provides hands-on advice on exports and assistance for market research, trade missions, and participation in international trade shows and exhibitions.

The MAFFSD supports MSMEs through three units, the Department of Cooperatives, the Belize Marketing and Development Corporation (BMDC), and the CFAPU. The Department of Cooperatives provides specialized enterprise development and capacity-building programmes and technical support in general management tailored explicitly for cooperatives. In contrast, the BMDC offers a comprehensive suite of marketing services for small agro-businesses, including retail, market linkage, advertising, product packaging and labelling, product development, branding, and general business advisory services. Meanwhile, the Central Farm Agro-Processing Unit (CFAPU) concentrates on delivering technical assistance and conducting research and development activities targeted at agro-processors⁴⁷.

The BCCI also provides training and mentoring in entrepreneurship to MSMEs who have become members. In addition, BCCI has put together a list of pieces of training in partnership with the UWI, Open Campus Belize, and the Belize Training and Employment Centre (BTEC) for business owners, professionals and their employees.

As well as in the sustainable tourism value chain analysis, Business development services are not readily available in the prioritized districts. Although some NGOs and local development organizations occasionally work towards business development or livelihoods, it is not their core activity, and the initiatives tend to need more consistency over time.

Local Governments may also offer specific business development programmes based on their unique needs⁴⁸. However, these programmes face several challenges: 1) lack of standardized framework across local Governments; 2) communication at the local level is not optimal, with some municipal Governments lacking a website and relying solely on social media, which limits the reach of the message to the post's availability; and 3) lack of funding⁴⁹. Additionally, local Governments partner with BELTRAIDE to offer BDS at the local level upon request.

In addition to local organizations, international agencies such as the CBI to the EU and the Department for International Trade (DIT) for the United Kingdom provide BDS with a focus on access to potential export markets.

The CBI is an agency that operates under the Netherlands Ministry of Foreign Affairs and aims to promote exports from developing countries to Europe. To accomplish this objective, the CBI assists MSMEs in these nations, enabling their entry into the European market and supporting the growth of their export volumes. The DIT has a similar objective but focuses on the United Kingdom. Both agencies can provide various services, including market intelligence, export coaching, networking opportunities, and business development trainings.

⁴⁷ Cooperatives represent a viable option for incorporating diverse producers into a self-sustaining business framework. Despite some successful cases, this business model has yet to gain significant traction in rural areas of Belize. Feedback from knowledgeable individuals in this field indicates that further efforts are required to promote collectivism and cooperatives within the country's rural culture.

⁴⁸ Municipal Governments in Belize have the legal power to promote business within their jurisdiction. One of their roles is to create an enabling environment for businesses to thrive by providing infrastructure, services, and regulations that support economic growth. They can also implement policies and programmes that promote investment, entrepreneurship, and local economic development. For example, municipal Governments can provide technical assistance and training to entrepreneurs and small businesses and facilitate access to financing and other resources. They can also work with private sector actors and other stakeholders to identify and promote economic opportunities in their communities, such as tourism, agriculture, or manufacturing.

⁴⁹ Municipal Governments rely heavily on the Government of Belize for subventions, even though the council generates substantial revenue via property taxes, vehicle licensing and registration, and liquor and trade license fees.

▶ **Table 9. Actors involved in business development services**

Entity	Service provider	Type of outreach
Consulting firms	▶ Business development and management services	Geared toward larger corporations
BELTRAIDE	<ul style="list-style-type: none"> ▶ Promoting and facilitating both domestic and foreign investment ▶ Fostering growth and development of trade and business sectors ▶ Training and mentorship for entrepreneurs and ▶ Technical assistance ▶ Hands-on advising on exports ▶ Assistance for market research, trade missions, and participation in international trade shows and exhibitions 	National
Department of Cooperatives (MAFFSD)	▶ Specialized enterprise development and capacity-building programmes for cooperatives	National
Belize Marketing and Development Corporation (MAFFSD)	▶ Marketing services for small agro-businesses, including retail, market linkage, advertising, product packaging and labelling, product development, branding, and general business advisory services	National
Central Farm Agro-Processing Unit (MAFFSD)	▶ Technical assistance, research, and development activities targeted at agro-processors	National
Belize Chamber of Commerce and Industry (BCCI)	▶ Training and mentoring in entrepreneurship for MSMEs	National (For members only)
Local Governments	▶ Specific business development programmes based on unique needs often lack a standardized framework across local Governments and face challenges in communication and funding. Partner with BELTRAIDE to offer BDS at the local level upon request	Local
Centre for the Promotion of Imports from Developing Countries (CBI) to the European Union	▶ Assistance to MSMEs in developing countries for entry into the European market and supporting export growth, including market intelligence, export coaching, networking opportunities, and business development training.	Local
Department for International Trade (DIT) for the United Kingdom	▶ Assistance to MSMEs for entry into the UK market and supporting export growth, including market intelligence, export coaching, networking opportunities, and business development training	International

Source: Author's own elaboration

Access to training

While most of the activities within the value chain can be performed by unskilled workers, some training should be done, mainly in food processing standards, food handling, and packing; the MAFFSD can cover all these topics through the CFAPU. It is essential to consider that the MSMEs should become autonomous in their training since some of these jobs should be trained "on the job" after the business starts operations.

Financing

There are limited affordable and accessible credit and financing for MSMEs in the agro-processing sector, Government's leading development bank is used for stable and less risky activities within the agriculture sector and limits the offer to commercial banks, which require collaterals, which can potentially restrict the possibilities for non-self-sourced business models. In addition, commercial banks are supervised on their risk appetite and, consequently, cannot engage with less conservative financial products for MSMEs. Current lending practices discriminate against subsistence farmers, new farmers, women/youth, and those without land ownership rights.

Another constraint is access to export credit. MSMEs are unable to access credit for expanding production. Since they require immediate cash flow, the intermediaries/exporters are compelled to sell on credit to a local distributor or export markets. The need for export credit facilities needs to be addressed by developing appropriate policies and frameworks.

In addition to the financial options available through traditional banking institutions, alternative institutions such as credit unions exist. Credit unions typically offer enhanced benefits to their members and shareholders. In Belize, credit unions have emerged as a preferable alternative to commercial banks, with several prominent credit unions operating in the country.

These credit unions across the country offers diverse loan options tailored to specific purposes, including personal loans, student loans, real estate, transportation, loans for MSMEs, construction workers, agriculture farms, marine products, manufacturing, building, tourism, forestry, and other types of loans with unique features. The interest rates for these loans vary based on the loan type and repayment period, with rates starting as low as nine per cent. Additional advantages of credit unions are annual dividends and rebates, loan coverage, life savings coverage on shares based on the threshold defined by the institution, insurance, reduced loan processing fees, lower costs for property appraisals, to name a few. Some credit unions also provide services to rural businesses, offering services such as a Rural Finance Programme, Agro-Chemical Fertilizer Services, and a Sugar Cane Replanting & Ratoon Maintenance Programme and these specific programmes, members may benefit from zero-interest rates for one year.

Even though agriculture is one of the main economic sectors, there still needs to be more access to financing or savings cooperatives for farmers. This prevents the growth of entrepreneurship and new investments in this sector.

Rules and regulations

The sector promotion is framed under the National Micro, Small, and Medium Enterprise Policy and the National Strategy for Agro-Processing and Food Production for Small Entrepreneurs in Belize. Both documents include policy elements that result in a better business environment and support the sector's competitiveness. All the activities resulting from any intervention in this sector should be aligned with the roadmap designed within these policy instruments.

Aside from labour and business regulations, the MSMEs engaging in this activity must comply with local and international standards; this will vary depending on the product and import market. In addition,

quality standards may be required to supply specific buyers. As described in the trading stage, this represents a significant limitation for MSMEs, as some associated costs may be expensive. For instance, laboratory testing of the products or certification of the packaging facility can be restrictive for such entities.

Opportunities and market constraints

Opportunities

Opportunities	Description
High demand	▶ This sector has undergone a period of rapid expansion within the last decade associated with adopting healthier lifestyles among consumers.
Comparative advantages	▶ The country boasts of advantageous environmental and market conditions. Belize has entered into several trade agreements, such as CARICOM and Central America, thus enabling its entry into both regional and international markets.
Existing support infrastructure	▶ The MAFFSD, through the CFAPU provides training and technical assistance and training in the areas of food safety and quality, labelling and packaging of products, quality control checks, and laboratory tests.
Trade benefits with the UK	▶ The country has the potential to offer several competitive advantages when compared with the UK's primary suppliers. These advantages include its proximity (in contrast with other producers such as Ecuador, Thailand, or the Philippines) and the trading benefits that arise from being a member of the Commonwealth of Nations.
Sustainable approach	▶ The promotion of this activity carries environmental benefits. Fruits that are typically unsuitable for export can be used as raw materials due to their physical appearance. Furthermore, the conventional drying methods used in this industry generate relatively low carbon emissions.
Low investment	▶ Initial costs for business tend to be low, equipment can be manually crafted, small operations can be started with minimum investment, and progressively increase their capacity by adopting new technology and methods of drying.
Support for accessing into new markets	▶ In addition to local Government organizations, international agencies such as the Centre for the Promotion of Imports from Developing Countries (CBI) to the European Union and the Department for International Trade (DIT) for the United Kingdom provide BDS with a focus on access to potential export markets.

Market constraints

Market constraints	Underlying causes
Lack of experience in drying tropical fruits	► Although the CFAPU has a history of drying agricultural products, the focus has been on producing tuber flours for local consumption rather than tropical fruits. Furthermore, the CFAPU possesses only one industrial dryer, which requires viable product consolidation from MSMEs.
Costs of compliance with trade and sanitary regulations	► Some of the associated costs may be prohibitively expensive. For instance, laboratory testing of the products or certification of the packaging facility can be restrictive for such entities.
Limited offer of BDS	► Business development services providers in the country are limited, particularly for MSMEs. While consulting firms specializing in business development and management can be located in Belize, their services are typically geared toward larger corporations. Moreover, the costs associated with these services tend to be steep, further impeding the access of MSMEs.
Challenges for cooperatives	► Cooperatives represent a viable option for incorporating diverse producers into a self-sustaining business framework. Despite some successful cases, this business model has yet to gain significant traction in rural areas of Belize. Feedback from knowledgeable individuals in this field indicates that further efforts are required to promote collectivism and cooperativism within the country's rural culture.
Limited access to finance	► There are limited affordable and accessible credit and financing for MSMEs in the agro-processing sector, Government's leading development bank is used for stable and less risky activities within the agriculture sector and limits the offer to commercial banks, which require collaterals, which can potentially restrict the possibilities for non-self-sourced business models.

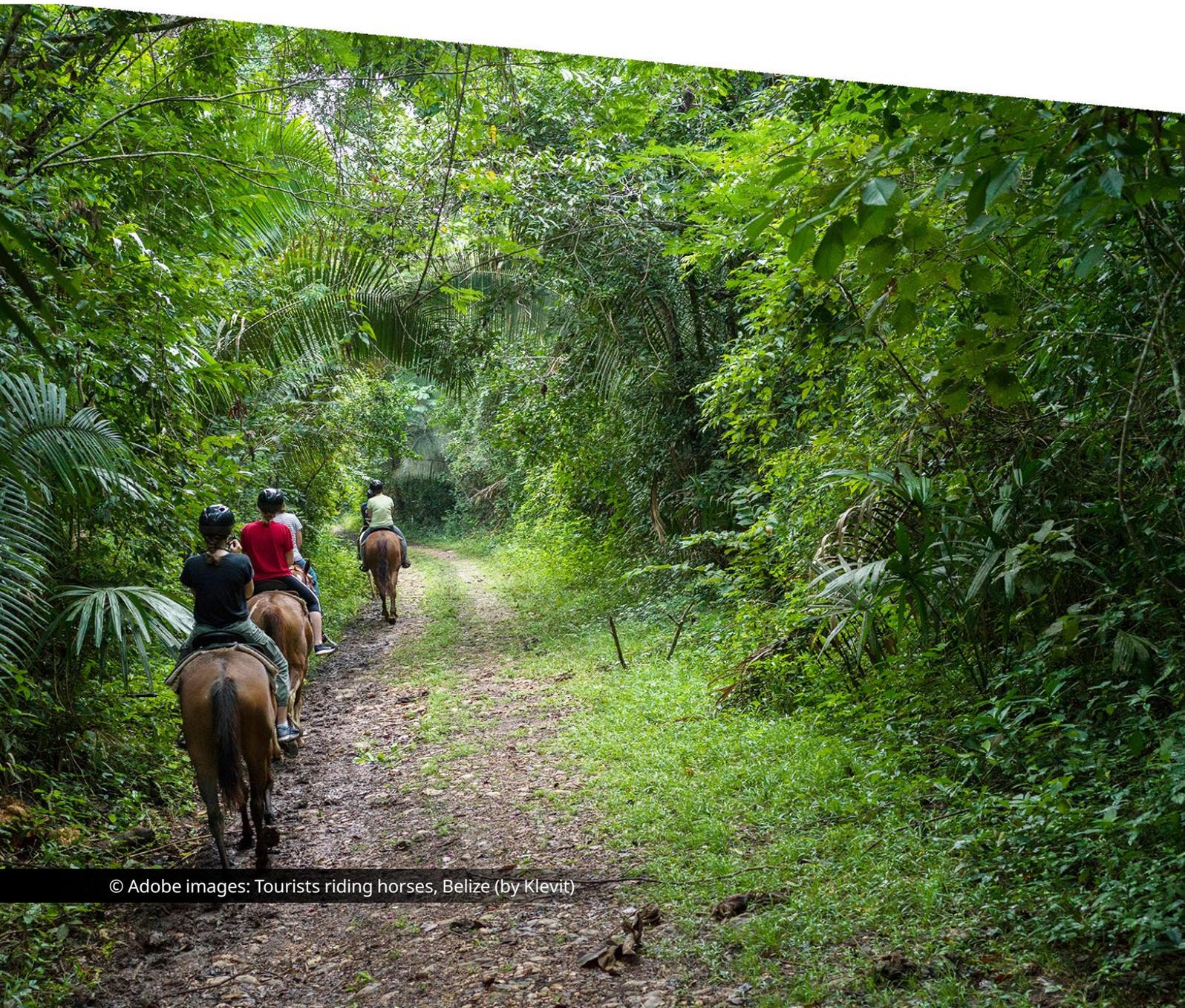
Recommendations for intervention

Strengthen the capacities of the CFAPU in processing dried and dehydrated fruits	
Activities	
<ul style="list-style-type: none"> ► Establish connections with international cooperation organizations and academic institutions to enhance CFAPU's capability to document best practices and conduct research and development on tropical fruit dehydration. ► Strengthen support capacities by training regional technical specialists who can serve as expert advisors to guide MSMEs. 	
Potential partners for intervention	
<ul style="list-style-type: none"> ► MAFFSD ► Ministry of Foreign Affairs, Foreign Trade, and Immigration 	<ul style="list-style-type: none"> ► University of Belize ► FAO

Professionalize the management skills of the owners of MSMEs and entrepreneurs in the agro-processing sector	
Activities	
<ul style="list-style-type: none"> ▶ Strengthen the capacity of BDS providers by adjusting the contents and strengthening the methodological offer of entrepreneurship training (consider the ILO methodology of "Start and Improve Your Business"). ▶ Develop customized business guides describing the expected business performance, process, access to the market, and potential vendors. 	
Potential partners for intervention	
<ul style="list-style-type: none"> ▶ BELTRAIDE ▶ BMDC ▶ BCCI 	<ul style="list-style-type: none"> ▶ CFAPU ▶ ILO
Promote the creation of cooperatives of production in the sector	
Activities	
<ul style="list-style-type: none"> ▶ Strengthen the capacities of the institutions and civil social associations to sensitize the community about the potential benefits of cooperatives by developing a communication campaign showing successful examples in the region. ▶ Strengthen the capacity of BDS providers by adjusting the contents and strengthening the training and methodological offer on cooperatives management (consider the ILO methodology of "My. Coop"). ▶ Promote the development of production cooperatives through business associations, indigenous associations, and existing agricultural clusters. 	
Potential partners for intervention	
<ul style="list-style-type: none"> ▶ Cooperatives unit at the MAFFSD ▶ ILO ▶ Ministry of Human Development 	<ul style="list-style-type: none"> ▶ BCCI ▶ NTUCB

Improve access to financing	
Activities	
<ul style="list-style-type: none"> ► In conjunction with financial sector institutions, develop credit schemes with conditions adjusted to the economic cycles of the sector and the needs of MSMEs. ► Promote financing through corporate social responsibility and supplier development programmes for UK and EU importers. ► Promote international investment in agro-processing by developing investment guides with specific business plans on drying tropical fruits. ► Engage with cooperation agencies in the importer countries (British cooperation, GIZ, or EU) to seek funding for MSMEs development in the agro-processing business. 	
Potential partners for intervention	
<ul style="list-style-type: none"> ► BELTRAIDE ► Ministry of Economic Development ► ILO 	<ul style="list-style-type: none"> ► Ministry of Foreign Affairs ► CBI ► BCCI
Explore the creation of a national brand for tropical dehydrated fruits	
Activities	
<ul style="list-style-type: none"> ► Develop centralized standards of production (including equipment, hygiene protocols, product development, and food handling) so that they can be certified. ► Develop a unique branding of Belizean tropical fruits (centrally operated by the BMDC). ► Consolidate volume to achieve better trade conditions. 	
Potential partners for intervention	
<ul style="list-style-type: none"> ► BELTRAIDE ► BCCI 	<ul style="list-style-type: none"> ► BMDC
Develop central purchase agreements with suppliers of agro-processors	
Activities	
<ul style="list-style-type: none"> ► Develop centralized equipment and packing materials purchases to negotiate better prices and conditions. ► Engage in centralized negotiation with fruit producer associations to ensure quality and better prices. 	
Potential partners for intervention	
<ul style="list-style-type: none"> ► BCCI ► MAFFSD 	<ul style="list-style-type: none"> ► BELTRAIDE

Incentive the participation of vulnerable populations in the sector	
Activities	
<ul style="list-style-type: none"> ► Increase the access of the vulnerable population to BDS through adjusting the channels, and contents and strengthening the training of liaisons of the vulnerable groups (indigenous associations, NGO's and Ministry of Human Development). ► Set specific targets on women, young and indigenous representation into the training for both, employment and entrepreneurship. 	
Potential partners for intervention	
<ul style="list-style-type: none"> ► Ministry of Human Development ► CFAPU 	<ul style="list-style-type: none"> ► BELTRAIDE



© Adobe images: Tourists riding horses, Belize (by Klevit)

► Appendix I. Institutions interviewed

Institutions/ Organizations	Type	Sector	Function
Ministry of Rural Transformation, Community Development, Local Government & Labour	State	Government	Oversees rural development, community empowerment, local governance, and labour-related matters.
Ministry of Finance, Economic Development and Investment	State	Government	Manages financial affairs, drives economic growth, and facilitates investment opportunities in Belize.
BELTRAIDE	State	Government	Promotes investment, trade, and enterprise development through a range of services for local and foreign businesses.
Ministry of Agriculture, Food Security, and Enterprise	State	Government	Guides agricultural policies, ensures food security, and supports the development of agribusinesses and enterprises.
Ministry of Tourism and Diaspora Relations	State	Government	Focuses on tourism development, promotes Belize as a tourist destination, and maintains relationships with the diaspora.
Ministry of Human Development, Families and Indigenous People's Affairs	State	Government	Addresses social development, family welfare, and indigenous affairs to enhance the well-being of Belizean citizens.
National Trade Union Congress of Belize (NTUCB)	Private	Workers' representative	Represents the collective interests of workers, safeguards labour rights, and advocates for fair working conditions.
Belize Chamber of Commerce and Industry (BCCI)	Private	Employers' representative	Serves as a business support organization, promotes commerce and industry, and represents the interests of the private sector.
Dangriga Town Council; and Hopkins Village Council	State	Government	Manages local governance, community initiatives, and public services.
Office of the Prime Minister	State	Government	Serves as the central executive authority, overseeing the overall governance and strategic direction of Belize.

In addition, some consultations were done with experts in sustainability, food processing, international trade, and tourism.



▶ Appendix II. Participants in the SDG taskforce

The validation workshop of the SDG taskforce included the participation of representatives of the following organizations.

- ▶ Belize Tourism Industry Association
- ▶ Belize Tourism Board
- ▶ Ministry of Rural Transformation, Community Development, Local Government and Labour
- ▶ Ministry of Finance, Economic Development, and Investment
- ▶ BELTRAIDE
- ▶ Ministry of Agriculture, Food Security, and Enterprise
- ▶ Ministry of Tourism and Diaspora Relations
- ▶ Ministry of Human Development, Families, and Indigenous People's Affairs
- ▶ Ministry of Sustainable Development, Climate Change and Disaster Risk Management
- ▶ National Trade Union Congress of Belize
- ▶ Belize Chamber of Commerce and Industry
- ▶ Dangriga Town Council
- ▶ Hopkins Village Council
- ▶ Office of the Prime Minister, Senior Policy Advisor
- ▶ Social Security Board
- ▶ World Food Programme
- ▶ United Nations Children's Fund
- ▶ National Committee for Families and Children
- ▶ Ministry of Blue Economy
- ▶ National Women's Commission
- ▶ International Labour Organization



► Appendix III. Assessment criteria

Criteria	Score	Description
Dimension 1: Potential for employment creation		
Growth potential The size of the economic sector and the growth forecast mean that there is potential for job creation.	3	<ul style="list-style-type: none"> ▶ The size of the economic sector and the growth forecast mean there is potential to create decent work. ▶ A sector with a minor or moderate size but a high growth forecast can be classified in this category.
	2	<ul style="list-style-type: none"> ▶ The sector size is moderate. ▶ A sector with a large size in gross production but a low or declining forecast in employment generation can be classified in this category.
	1	<ul style="list-style-type: none"> ▶ The sector's size is limited or has little potential for creating direct employment and/or decent work conditions.
Potential for decent work Companies in this subsector are usually formal and offer decent employment conditions to their workers.	3	<ul style="list-style-type: none"> ▶ Employment in the sector is offered under decent working conditions.
	2	<ul style="list-style-type: none"> ▶ There are some decent work deficits, but these can be addressed.
	1	<ul style="list-style-type: none"> ▶ Working conditions tend to be precarious.
Participation in the green economy The subsector's development and/or decarbonization can significantly contribute to reducing emissions and environmental degradation or increasing resilience to the effects of climate change.	3	<ul style="list-style-type: none"> ▶ The development and/or decarbonization of the subsector can significantly contribute to reducing emissions and environmental degradation in the country.
	2	<ul style="list-style-type: none"> ▶ The development and/or decarbonization of the subsector contributes moderately to the reduction and/or compensation of emissions and environmental degradation of the country.
	1	<ul style="list-style-type: none"> ▶ The development and/or decarbonization of the subsector has a lower impact on the reduction of emissions and environmental degradation of the country.

Criteria	Score	Description
Dimension 2: Relevance to the target group		
Women participation There is an equitable representation of women in jobs in this sector.	3	▶ There is an equitable representation of women in jobs in this sector.
	2	▶ Women participate in the sector, but their participation needs to be more equitable, or there is equitable representation but not at all levels.
	1	▶ There is limited participation of women in the sector and/or no favourable conditions for their inclusion.
Indigenous groups participation There is a significant participation of indigenous workers in the sector.	3	▶ There is a significant participation of indigenous workers in this sector.
	2	▶ Indigenous workers participate in the sector, but their participation is limited to specific jobs and occupations.
	1	▶ There is limited participation of indigenous workers in the sector and/or no favourable conditions for their inclusion.
Young workers participation There is a significant participation of young workers in the sector.	3	▶ There is a significant participation of young workers in this sector
	2	▶ Young workers participate in the sector but are limited to specific jobs and occupations.
	1	▶ There is limited participation of young workers in the sector and/or there are no favourable conditions for their inclusion.
Dimension 3: Feasibility for intervention		
Willingness of relevant actors There is a willingness of the public and private sectors to create changes in public policies and/or programmes that promote the development of this sector.	3	▶ There is a high willingness on the part of the public and private sectors to carry out and adopt policies that facilitate the promotion of this sector.
	2	▶ There is a willingness on the part of one sector but resistance and/or restrictions on the part of the other.
	1	▶ There is little willingness on the part of both sectors to develop interventions in this sector.

Criteria	Score	Description
Dimension 3: PFeasibility for intervention <i>(continued)</i>		
Market feasibility It is possible to carry out sectoral actions that benefit the value chain development in this sector.	3	► Given the homogeneity in the existing processes, technology, and infrastructure, they allow the implementation of sectoral actions associated with the promotion of the sector that translates into the creation of jobs.
	2	► It is possible to carry out generic sectoral actions associated with promoting sectoral actions, but these actions only address some opportunities in the sector.
	1	► The variability in processes, technology, and infrastructure limits the implementation of sectoral actions.



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► Appendix IV. Weighting criteria

► Table 10. Weighted assessment criteria

Dimension 1: Potential for employment creation		
Criteria	Definition	Weight
Growth potential	The size of the economic sector and the growth forecast mean that there is potential for job creation	15%
Potential for decent work	Companies in this subsector are usually formal and offer decent employment conditions to their workers	15%
Potential to work in the green economy	The development and decarbonization of the subsector can significantly contribute to reducing emissions and environmental degradation or increasing resilience to the effects of climate change.	10%
Dimension 2: Relevance to the target group		
Criteria	Definition	Weight
Women participation	Currently, there is an equitable representation of women in jobs in this sector	10%
Indigenous groups participation	Currently, there is significant participation of indigenous workers in jobs in this sector	10%
Youth employment participation	Currently, there is a significant participation of young workers in jobs in this sector	10%
Dimension 3: Feasibility for intervention		
Criteria	Definition	Weight
Willingness of relevant actors	There is a willingness of the public and private sectors to create changes in public policies and programmes that promote the development of this sector	15%
Market feasibility	It is possible to carry out sectoral actions that benefit the value chain development in this sector	15%

Source: Author's own elaboration and validated by Joint SDG Fund Taskforce working group



► Appendix V. BELTRAIDE services

BELTRAIDE, commonly referred to as the Belize Trade and Investment Development Service, is a distinguished organization within Belize dedicated to facilitating investment, trade, and fostering enterprise development within the nation. BELTRAIDE is renowned for its comprehensive array of services tailored to assist both domestic and international businesses, as well as entrepreneurs. The notable services offered by BELTRAIDE encompass the following:

1. **Investment and business promotion:** The Belize Trade and Investment Development Service (BELTRAIDE) is an organization created by the Government of Belize to promote economic development through investment promotion, entrepreneurial development, and marketing and policy recommendations. BelizeINVEST facilitates and promotes investment opportunities in Belize by providing information, guidance, and support to potential investors.
2. **Export development:** works to expand Belize's export capacity by assisting businesses in accessing international markets. EXPORTBelize provides training to clients to help strengthen capacity in order to ease the process when entering international markets.
3. **Enterprise support:** BELTRAIDE offers mentorship and technical assistance to entrepreneurs. In addition, this organization has a Belize Enterprise Revolving Fund (BERF) that seeks to establish an inclusive financial mechanism that will grant a specific subset of MSMEs the opportunity to access a combination of grant and loan funding with concessionary interest rates and appropriate loan terms. (Beltraide 2022).
 - a) **WeXchange Women STEMpreneurs Competition** seeks to identify the most innovative and dynamic women entrepreneurs in science, technology, engineering, and mathematics (STEM) from Latin America and the Caribbean and connect them with potential financing opportunities.
 - b) **Small Business Development Centre Belize (SBDCBelize)** is a unit of BELTRAIDE, which provides customized needs-based services to MSMEs to facilitate their competitiveness and export readiness. SBDCBelize provides one-on-one, needs-based services.
4. **Training:** BELTRAIDE offers workshops and capacity-building initiatives to enhance the skills and knowledge of entrepreneurs and small businesses through the Belize Training and Employment Centre. This unit has a permanent offer of training in the areas of job preparedness in industries such as tourism, BPO, and healthcare, as well as professional development initiatives and customized programmes to respond to specific market needs.



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► Appendix VI. BCCI services

The BCCI is Belize's largest private sector membership-based organization. The Chamber has consistently championed the causes of its private sector constituency. Among its primary objectives, it considers the social and economic development of Belize through the development of all sectors of industry, commerce, and services. Currently, the BCCI boasts a fluctuating membership of more than 350 Belizean businesses from a broad cross-section of the agricultural, productive, service, and industrial sectors. BCCI offers various services to support local and foreign businesses and entrepreneurs. Some of the key services provided by BCCI include:

1. **Training:** BCCI has a permanent offer of training in partnership with the UWI, Open Campus Belize, and the Belize Training and Employment Centre (BTEC) focused on workforce training and entrepreneurship development.
2. **Group insurance:** BCCI members can access a special Health and Life Insurance corporate package. The package is most beneficial to MSMEs and comes at very reasonable and affordable rates.
3. **Business intelligence:** BCCI provides entrepreneurs with information that can guide them through every stage of doing business in Belize, from how to start a business to steps necessary to expand into the export market. This can be done either through mentorships and one to one advising of though research and documentation, particularly based in two mechanisms:
 - a) **Trade and investment zone:** This special site within BCCI website provides a virtual one-stop shop for information to help entrepreneurs navigate the policies that directly or indirectly affect business operations and Trade and Investment in Belize.
 - b) **Compensation survey:** Through a partnership with a specialized consulting company the BCCI and it's members participate in a compensation and benefits survey, the report with the results provides reliable market data on wages, benefits and trends on workforce management.
4. **Career centre:** BCCI operates a career services centre where member company job openings are advertised on their website.
5. **Credit master system:** BCCI members have access to a complaint system where scores of debtors can be searched.
6. **Networking services:** BCCI constantly organizes networking events to provide access to other members.
7. **Dispute resolution:** BCCI serves as an intermediary to provide mediation between businesses.

In addition, the BCCI can provide legal and business guidance to members on specific topics such as business development or industrial relations.



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