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Martinique: from the sugar island to the island-terroir

Published on 07/07/2021

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The cane-sugar-rum sector integrates both an agricultural component, an industrial dimension and a tourist valorization. Obtaining the only controlled designation of origin for a rum (agricultural rum from Martinique) in 1996 has guided all the players in the sector towards quality efforts, in a context of strong competition. Today, spiritourism is both a way to communicate around these efforts and to capture tourism revenues.

SUMMARY

1. Martinique's rum industry: an agro-industrial production system focused on quality
2. New challenges for agricultural rum

[Bibliography](#) | [keywords](#) | [cite this article](#)

Martinique rum is the first and only agricultural rum recognized by an [Appellation d'Origine Contrôlée](#), the first in tropical environments. Within the [DROM-COM](#) (overseas departments and regions and overseas collectivities) and the Caribbean islands, the particularity of Martinique is the predominance of agricultural rum which represents more than 80% of its production. This "typical Martinican anomaly" (Ferré, 1976) was recognized in 1996 with the obtaining of the AOC "Martinique Agricultural Rum", replaced in 2015 by "Rum of Martinique", and registered in the Register of Geographical Indications (JORF of 31 December 2020).

Sugar island then rum island, Martinique has thus become an island-terroir, giving its rum its authenticity. *"As part of the AOC we consider that there is only one terroir: the Martinique terroir."* (Charles Larcher, President of CODERUM [1]). Jean-Robert Pitte (2010) defines **terroir** as follows: *"in the content of a terroir, a certain type of soil, a microclimate, water availability and above all a collective know-how perfected from generation to generation, but always revealing a facet of the potentialities of the space considered"*.

Integrated for four centuries into the cane-sugar-rum sector, rum production is still an essential activity of Martinique's economy. For the year 2020, production reached 107,200 Hectoliters of Pure Alcohol (PAH) or 17 million liters of white rum at 55 °. With a turnover of 400 million euros, this activity represents 20% of the added value of the island's agri-food industry (IEDOM) and 8% of export earnings or 42.6 million euros (CODERUM).

Currently, rum leads sales of white spirits, ahead of vodka and gin, but is ahead of whisky and brandy in the global spirits market. Admittedly, Martinique agricultural rum occupies only a tiny place at this level, however, it is nevertheless a flagship of the island's economy. In addition to the main challenge of safeguarding and developing rum production, the AOC has played a leading role in its changes evidenced by the concentration of companies, the internationalization of markets but also in the determination of professionals to solve the weaknesses inherent in the sector.

The study of Martinique's rum production is exemplary in that it sheds light on the role of private and public actors, and on the evolution of a strategy that adapts to globalization. It thus makes it possible to analyse the territorial effects of an agro-industrial sector in the economic development of a small island entity.

Box 1. Definitions of rum



1. Martinique's rum industry: an agro-industrial production system focused on quality

Rum production is of paramount economic and social importance in Martinique. It contributes to maintaining agricultural and industrial activity throughout the island. The cane-rum sector includes primary agricultural production, the processing of agricultural and traditional rums into finished products, the marketing, distribution and consumption of these products. It is clearly perceived as a tangible reality by planters, distillers and all the players in this sector of activity.

1.1. A sector facing rapid changes

Box 2. The different rums



Has. Agricultural rums

Agricultural rum is made in Martinique, but also in Guadeloupe, Marie-Galante and Saint-Barthélemy. The islands of Reunion and Mauritius also produce agricultural rums.

White rum

It is made from vesou, fresh cane juice, to the exclusion of any other raw material in industrial units called "agricultural distilleries" in order to distinguish them from "sweet rum factories". The colorless, perfectly translucent agricultural white rum is stored for three months in stainless steel tanks before being elongated with water to lower the alcohol level. It is bottled and marketed at 50 ° or 55 °.

Rum raised undergrowth

It is a white rum that has stayed in oak barrels for a period that can vary from one to three years, and whose appearance has taken a slight straw yellow coloration.

Amber rum

This rum is obtained by a mixture of straw rum and old rum. It is less colorful than old rum, but very close to it in taste. There are no regulations on their ageing time or colour.

Old agricultural rum

After distillation it must be stored for at least three years in oak barrels of up to 250 litres. It can be left longer in barrels, but its name does not change. The appellations "very old" or "out of age", derived from mixtures, are, for the moment, only indications of the distiller.

This rum should not be confused with the "brown" rum obtained by artificial coloring using the addition of caramel. For many years, in the absence of precise legislation, only this colourful rum was exported to Europe. Nowadays, old rum has earned its letters of nobility, and it is often compared to the best cognacs.

B. Traditional rums

Traditional rum can be classified into three categories: traditional white or old rum, light rum, and rum with great aroma. In order to avoid any form of ambiguity, as part of this research, we will designate the two types of molasses rums produced in Martinique, respectively under the terms: sweet rum and rum great aroma.

Traditional white or old rum

This traditional white rum is distilled from the poor molasses or sewers resulting from the manufacture of sugar.

Traditional old rum is obtained from white rum which is put in barrels for three months or more to give it its brown color.

Light rum: an alcohol for cocktails

This white rum is characterized by its low content of non-alcoholic elements, between 60 and 80 g per PAH, a result obtained by further distillation, which gives them a more neutral character and an aroma that is not very noticeable. In addition, it is generally marketed at 37.5% by volume, which makes it more suitable for mixtures and cocktails. On international markets, the various brands of light rums are formidable competitors for agricultural rums.

Grand Arôme Rum (RGA)

Developed at the end of the XIX^e century, it was referred to as "double aroma". This molasses rum has the characteristic of being full-bodied and having a very strong aroma thanks to a non-alcohol content of 800 g / l, two to three times higher than that of classic traditional rum. Its qualities result, from the composition of the must, a mixture of molasses and vinasse that ferments in wooden vats, and on the other hand, from the relatively long duration of fermentation. Its manufacturing process remains largely secret. Martinique and Jamaica (1,200 g/PAH) are the only countries in the world to manufacture them.

The pre-eminence of agricultural rum in martinique's agri-food sector

Rum production is martinique's main agri-food activity with 16.5% of the sector's value added (IEDOM 2020). In 2020 the overall rum production reached 107,203 PAHs (hectoliters of pure alcohol). From 2009 to 2014, it had stagnated at around 80,000 HAp. In 2015 and 2016 it was above 90,000 PAHs due to more favourable production conditions. But a succession of bad weather from 2017 to 2019 resulted in the decline of 2019, with only 89,952 PAHs produced. (document 1). **Within the total production, agricultural rum represents 95,438 PAHs or 89% of the volume.** After the decline in 2019 (79,469 PAHs), the increase is significant with 20% more PAHs in 2020.

In Martinique, the production of agricultural rum dwarfs that of industrial rum as much as that of sugar. The evolution of the production of sugar rum is very irregular because it depends on the tonnage and richness of the cane handled in the sugar factory and consequently on the volume and quality of molasses. In 2020, the plant's distillery produced 11,764 PAHs of traditional rum, up 12% from 2019.

Document 1. Evolution of rum production (2009 – 2020) in PAHs



Source: IEDOM, 2020

Export image

Box 3. History of rum in Martinique



The volume of sugar produced by the Galion plant increased from 5,564 tonnes in 2009 to 547 tonnes in 2019, a decrease of 45.8% in ten years. Production doubled in 2020 to 1,194 tonnes. Indeed, Martinique has opted for the production of agricultural rum, unlike the island of Reunion which is the main producer of French and European cane sugar (174,200 tons) and Guadeloupe where sugar production remains significant (42,500 tons) (IEDOM 2019). Each of the distilleries producing agricultural rum, after having proceeded to the various stages of certification for AOC approval, reserves part of its production for the manufacture of rum raised under wood and the elaboration of old rum.

Box 4. The AOC: a label of qualitative differentiation



Concentration of production and stabilization of the industrial landscape

Since 2006, the production of agricultural rum has **8 so-called smoking distilleries** that receive sugar cane and produce rum and **4 so-called non-smoking distilleries**. In twenty years, the production apparatus has undergone a profound restructuring marked by the disappearance of six industrial units. This retraction of the production apparatus is the result of the accumulation of several handicaps, mainly the reduction of the areas cultivated with cane, the financial difficulties that did not allow the replacement of aging technical equipment, urbanization and safety standards (Dillon). This resulted in the total disappearance of some distilleries (Bernus, Duquesne, Union-Maniba) and a refocusing of production with a desire to gain in productivity for others (Clément, Trois-Rivières, Dillon), see document 3.

Document 3. Distillery closure dates

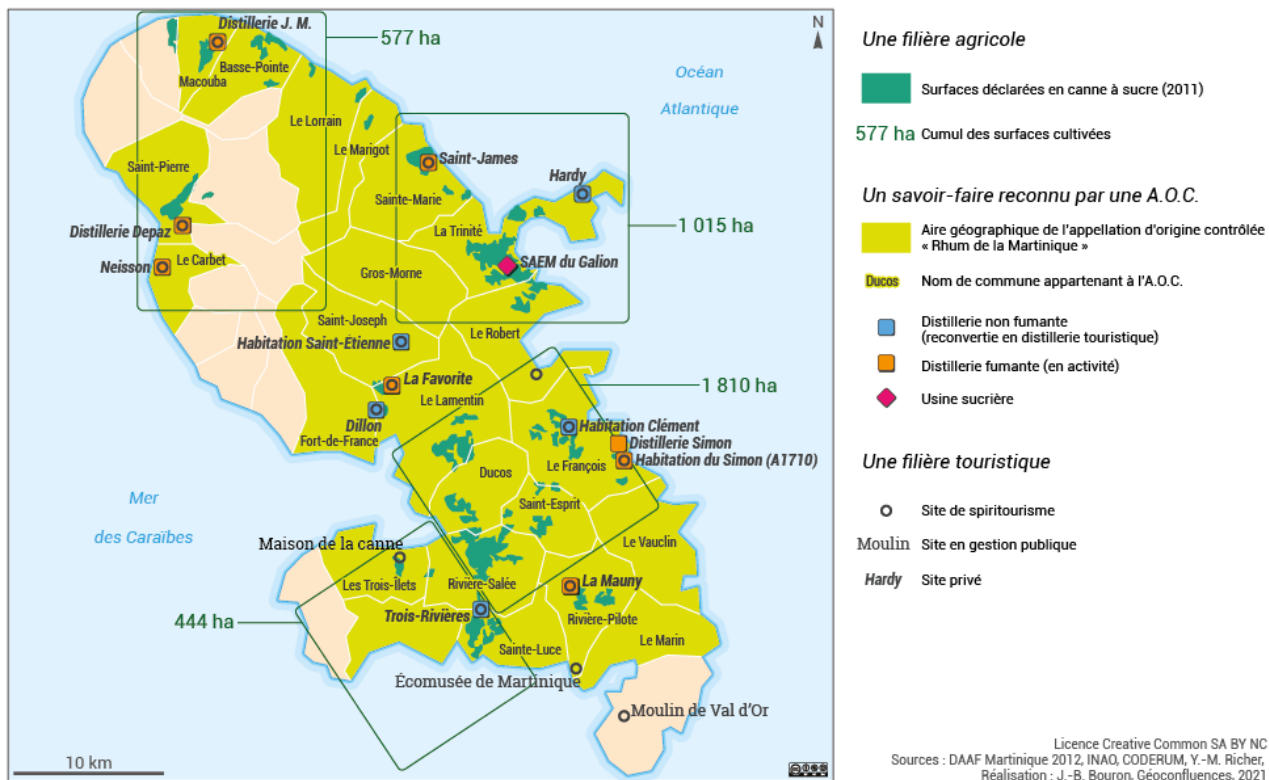
- 1982: Bernus (Fort-de-France)
- 1983: L.p. Duquesne (Rivière-Salée)
- 1985: Union-Maniba (Case-Pilote)
- 1986 : Clément (Le François)
- 2003: Trois-Rivières (Sainte-Luce)
- 2006: Dillon

Sources: Surveys

Four distilleries produce for several other brands: Saint-James (Saint James and Bally), Depaz (Depaz and Dillon), La Mauny (La Mauny, Trois-Rivières), Le Simon (Clément, HSE). Finally, three production units exclusively manufacture their own brand: Neisson, La Favorite, JM. The agricultural white rum of the brand A 1710 is made in an independent distillery.

After decades of closure, in 2016, the distillery A 1710 was opened in Le François, near the Simon factory, intended for the manufacture of agricultural rum (non-AOC). Indeed, the production is innovative, combining the methods of yesteryear (copper still) and the most recent (distillation columns).

Document 4. Cane and rum production in Martinique, and spiritourism



The smoking distilleries differ from the **4 so-called non-smoking distilleries that no longer manufacture rum but have been converted into tourist sites** (Habitation Clément, Habitation Saint-Étienne, Dillon and Trois-Rivières, document 4). These production units contribute to maintaining local agri-industrial activity with a very balanced network throughout the territory of Martinique.

Among the smoking distilleries four are located in the North (JM, Neisson, Depaz, Saint-James), one in the center (La Favorite) and three in the South (Simon, La Mauny). This spatial distinction must also take into account the existence of the old production structures that maintain certain activities in situ. Thus the rums

Clément and Saint-Etienne (HSE) are aged and marketed as part of their former distillery, respectively, the Habitation Acajou in François and the Habitation Saint-Étienne in Gros-Morne.

Box 5. Financial concentration: the attraction of foreign investors



Rum production between patrimonialization and innovation

While rum technology has borrowed techniques from other brandy industries such as aging, some processes have undergone their own evolution, such as distillation or processing of raw materials. The manufacturing process that has seen few direct innovations since the late nineteenth century^e century, is therefore part of a **long tradition of know-how** of professionals. Nevertheless, a technological revolution has recently transformed industrial units that now integrate state-of-the-art equipment at different stages of production (document 6)

Indeed, the codification of local rum manufacturing uses to obtain the AOC has led to the emergence of technical and scientific questions that have been gradually resolved. These changes have contributed to the development of a dual image of distilleries that juxtapose traditional tools (steam engines) and innovative high-tech equipment.

Document 6. The duality of distillery equipment



Steam engine of the Dillon distillery. Photo: Y.-M. Richer.



Automated control console of the distillation columns of the Simon distillery. Photo: Y.-M. Richer.

However, these do not replace traditional equipment, they complement it and improve its performance. The techniques used use hydraulics, pneumatics, computers and automation. For example, they make it possible to control the automatic arrival of the wine in the wine heater and then in the column to be distilled.

Most distilleries are also equipped with a quality control laboratory. Samples of rum at the exit of the column are taken and scientifically analyzed to verify the expected profile of the rum manufactured. Important prospects are also open for the future in the field of fermentation and distillation.

1.2. Cane for rum

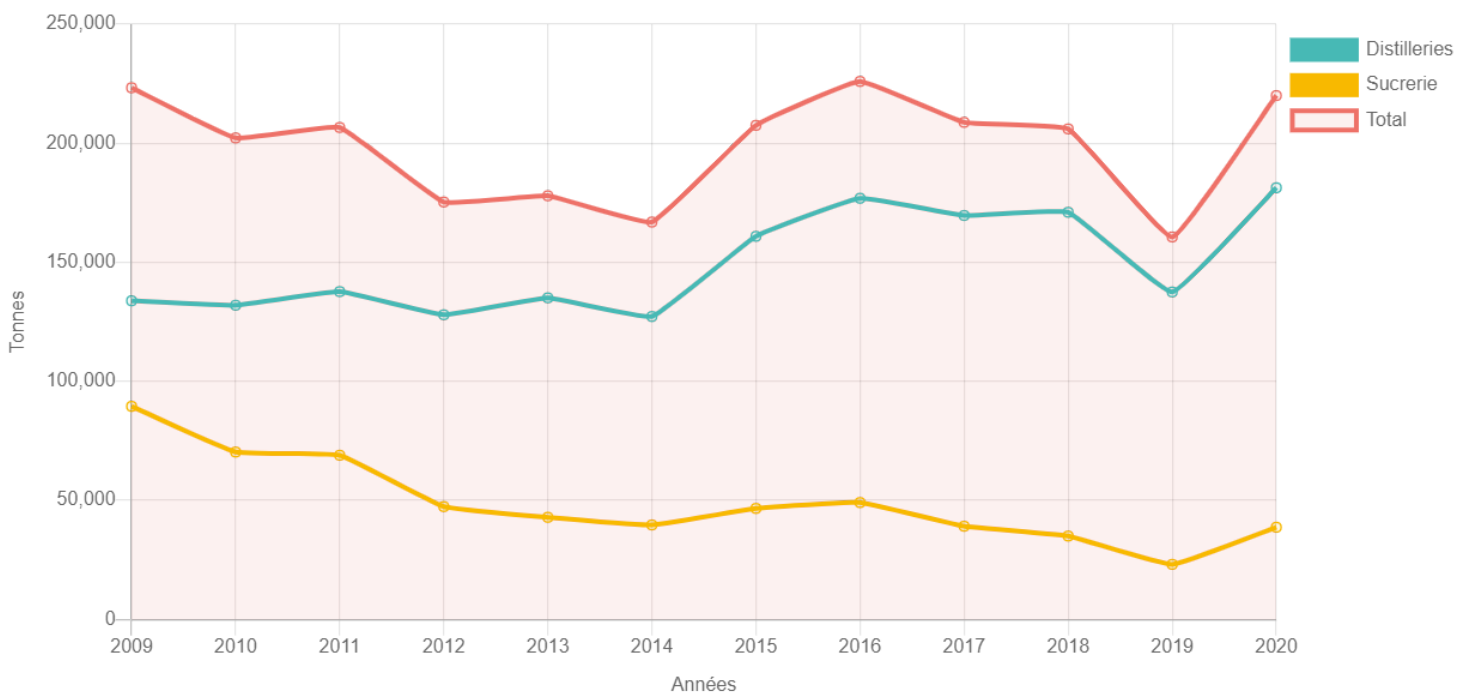
Cane production that favours agricultural rum

The rum and sugar campaign takes place every year from February to June. More than two-thirds of the sugar cane harvested is destined for distilleries and the production of agricultural rum, with the remainder going to the manufacture of sugar. After three years of decline, the 220,000 tons of the 2020 campaign have given hope to Martinican professionals. The distilleries shared 181,300 tonnes of cane (82%) leaving 38,700 tonnes for the Galion sugar refinery. Nevertheless, the production of this raw material is not only insufficient, it is also irregular. In reality, "the island's cane needs would be more around 250,000 to 270,000 tons" (E. Eugénie, director of SICA-UNION).

Sugarcane cultivation is very sensitive to climatic hazards. However, for the past ten years, the serial bad weather (drought, floods, tropical storms: Mathew in 2016 and Maria in 2017) has slowed growth, hindered harvests and lowered the sugar content of the stems. Thus, in 2019, only 160,613 tons of sugar cane were harvested, a significant decrease of -22.2% compared to 2018. As a result, the average yield also fell by 23.7% to 41 tonnes/ha from 53.8% in 2018.

The very strong drought experienced by Martinique in 2019 persisted in 2020, being less drastic in the North than in the South. Distillers still benefited from a better yield for rum production. "In 2020, we had a little rain during the cane growing period, which allowed us to have quantity, and then we had a good drought that allowed us to have yield, that is to say sugar" (Mr. Sassier, responsible for the production of Saint-James rums).

Document 7. Evolution and distribution of sugar cane production (2009 – 2020)



Source: IEDOM, CTCS

Export image

The other difficulty faced by planters is **grassing**. Indeed, the cane sector is confronted with the latest European directives (91/414/EC) which stipulate the cessation of the use of substances, highly polluting, to fight against weeds. If the harvest is 95% mechanized, planters are required to work manually for the uprooting of weeds in a context of increasing scarcity of labor. For the year 2020, the workforce could not be present due to the pandemic and the closure of borders. New techniques involve introducing cover plants or robots that pass through the aisles and clean the cane interrows. These methods remain limited and experimental (Neisson).

Pour les planteurs, la canne est de moins en moins rentable. Au cours de la décennie 2010, la chute de la production a fait baisser leur chiffre d'affaires de 30 % malgré une augmentation du prix de la tonne (90 € en 2019). Les planteurs reçoivent l'aide technique et scientifique des spécialistes du Centre Technique de la Canne et du Sucre (CTCS) qui les accompagnent dans le choix des méthodes culturales. L'aide financière locale, nationale et européenne leur permet d'alléger leurs charges (encadré 6).

En revanche, selon les producteurs, si la pandémie de Covid-19 a nécessité des ajustements pour garantir une production en toute sécurité, elle n'a pas empêché le bon déroulement de la campagne 2020.

La canne structure l'espace agricole

La canne à sucre permet de maintenir des bassins de culture agricole sur une grande partie du territoire. En 2019, elle couvrait 3 913 ha soit 16,6 % de la SAU en augmentation de + 1,9 % par rapport à l'année précédente. **Au sein de l'espace cannier, le périmètre de l'AOC compte 278 hectares, soit 7 % de l'aire globale** (voir carte du [document 4](#)).

L'implantation des distilleries agricoles actuelles répond à un partage de l'espace en sphères d'influence commandées par l'approvisionnement en cannes à sucre. Trois distilleries (Neisson, Fond Préville et Depaz) en raison de leur localisation marginale, possèdent un bassin cannier propre qui assure l'intégralité de leurs approvisionnements. En revanche, les autres distilleries dépendent pour partie ou en totalité d'exploitations agricoles indépendantes.

La canne à sucre est cultivée dans cinq zones principales. Elle est présente dans les communes de la plaine du centre : Lamentin, Ducos, Rivière-Salée ; dans les communes du Sud : François, du Vauclin Sainte-Luce et Rivière-Pilote ; les communes du Nord-Est : Trinité, Sainte-Marie ; du Nord : Basse-Pointe et Macouba ; du nord-Ouest : Carbet et Saint-Pierre. La canne destinée à la production du rhum AOC est produite exclusivement dans l'aire délimitée ([document 4](#)).

Une forte contribution à l'emploi et une diversification des fonctions

L'ensemble des activités de la filière génère 3 900 emplois directs et indirects.

Les planteurs constituent des acteurs incontournables. Leur nombre baisse régulièrement. En 2019, ils étaient 177 contre 185 en 2018. Pour la plantation et la récolte, il est fait appel aux ouvriers spécialisés tels les conducteurs d'engins à couper la canne. De plus, pendant la récolte, des saisonniers originaires de la Caraïbe (Sainte-Lucie, Haïti) sont recrutés.

Le personnel est de plus en plus qualifié dans les distilleries. La gestion des procédures liées à l'AOC a nécessité le recrutement de chercheurs, de techniciens pour les laboratoires des distilleries et du CODERUM, ainsi que pour le CTCS. La maintenance pendant la campagne et l'inter-campagne requiert une main-d'œuvre qualifiée et spécialisée. Pendant l'inter-campagne, certaines machines sont entièrement démontées pour l'entretien et la maintenance, notamment les colonnes à distiller et quelques éléments de la machine à vapeur.

Toutes les entreprises ont recruté des cadres de qualification technique élevée (ingénieur, chimiste, BTS informatique) et d'importants programmes de formation professionnelle ont été engagés. Certaines distilleries ont placé l'ensemble de la production sous le contrôle d'un ingénieur en industrie agro-alimentaire ou en chimie (Depaz, Simon, Saint James). Son travail consiste à surveiller toute la chaîne de la production, à effectuer les contrôles scientifiques du vesou, du moût, du vin et du produit distillé. Celui-ci est également chargé du contrôle de qualité du rhum agricole AOC. Les résultats de ces mesures lui permettent d'améliorer les réglages des différents équipements de la production.

Les distilleries possèdent chacune **leur maître de chai** chargé du vieillissement et des assemblages, ainsi que des emplois spécifiques tels les conducteurs de ligne d'embouteillage.

Les grandes marques ont intégré les différentes étapes de la distribution avec des agents commerciaux, tant au niveau local que pour les besoins des exportations à l'échelle nationale et internationale. De même, les distilleries ont recours soit en interne à des personnels chargés du marketing (chefs de produits) soit à des entreprises spécialisées. Enfin, avec le développement du spiritourisme, les distilleries comptent désormais du personnel formé à l'accueil, des responsables de site et des guides.

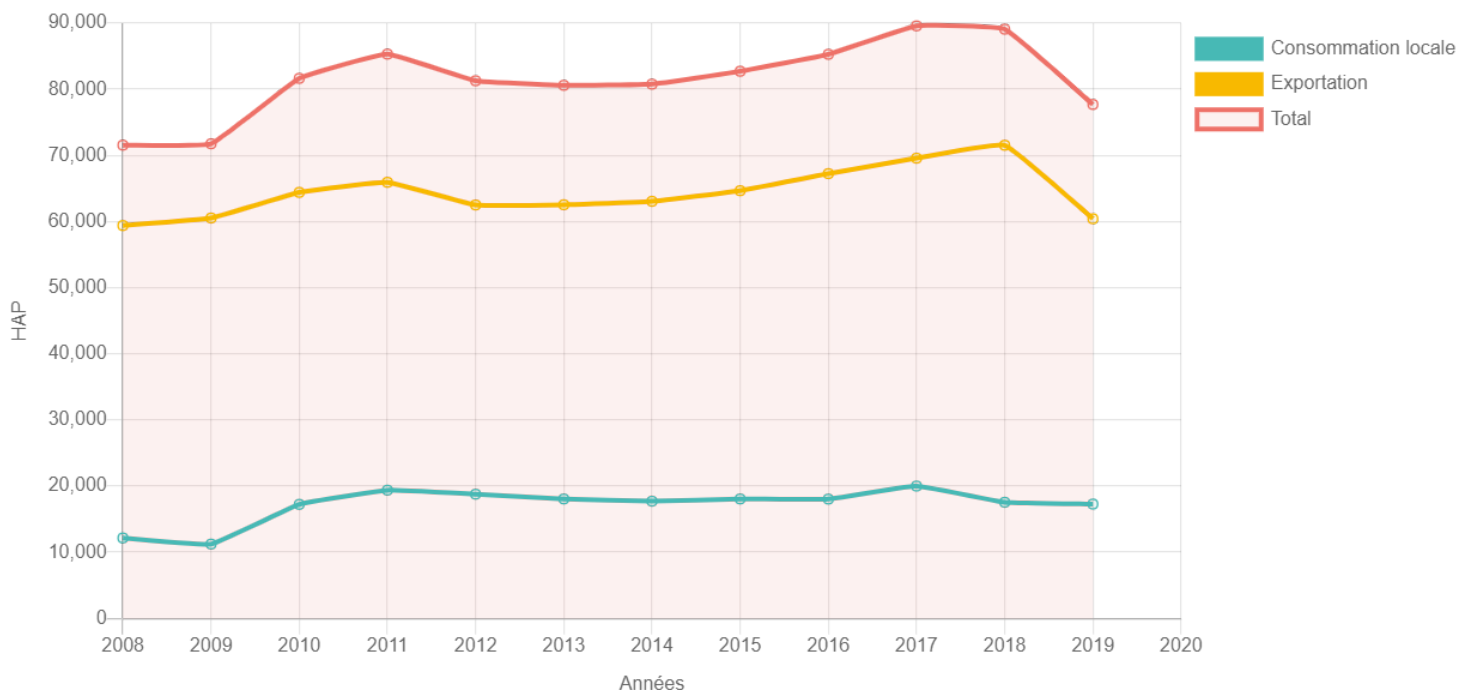
1.3. Le rhum de Martinique : un produit d'exportation

Le rhum est le troisième spiritueux consommé dans le monde. Dans l'océan du rhum industriel, le rhum agricole représente moins de 5 % de la production rhumière mondiale, dont 1 % réalisé en Martinique.

Un héritage du système colonial

Au total, 85 % du rhum martiniquais est exporté. Il constitue le deuxième produit d'exportation, derrière la banane. En 2019, il a assuré 20 % de la valeur d'exportation de biens (hors produits pétroliers) de l'île. La prédominance des exportations est un héritage du système colonial.

Document 8. Exportations et consommation locale du rhum de Martinique



Source : IEDOM, CODERUM

Exporter l'image

En 2019, les 60 427 HAP de rhums exportés par la Martinique se répartissent comme suit : 50 386 HAP pour le rhum agricole (- 17,0 %) et 10 041 HAP pour le rhum traditionnel (+ 7,6 %). Avec 80 % des importations, la France hexagonale est la principale destination du rhum de la Martinique. En 2020, le marché hexagonal est le seul à afficher une progression de + 4,7 % en dépit de la fermeture des cafés-hôtels-restaurants.

Le rhum de Martinique est présent dans une centaine de pays dans le monde avec des volumes conséquents en Espagne, en Italie, aux États-Unis, au Canada et en Belgique. D'autres pays tels la Suisse, la Chine ou le Japon demeurent des marchés de niche. Le marché mondial a reculé de 30 % en 2020 en raison de la pandémie de covid-19 et des restrictions de déplacement aux frontières. Sur les marchés français et internationaux, le rhum de Martinique se trouve concurrencé par des producteurs géants, notamment vénézuéliens et mexicains, au marketing féroce.

Depuis une dizaine d'années, la consommation locale est stable (17 282 HAP en 1919). Toutefois, privés des touristes et avec de surcroît, la fermeture des cafés-hôtels-restaurants, les pertes cumulées en termes chiffre d'affaires s'élèvent à - 35 %.

Une production aidée pour des exportations protégées

Pour aider les acteurs de la filière à faire face à cette concurrence, la France et l'Union européenne ont mis en place des mesures fiscales et financières.

Encadré 6. Les aides à la filière



Les rhums agricoles et industriels des Départements et Collectivités d'Outre-mer bénéficient d'un régime fiscal privilégié. La fiscalité réduite et les aides européennes et nationales sont destinées à compenser les surcoûts de production liés à l'éloignement des lieux de commercialisation, à soutenir la compétitivité des rhums des DROM-COM sur le marché national et ainsi préserver l'activité de la filière canne-sucre-rhum dans ces territoires.

Il s'agit avant tout de contraintes économiques pour lesquelles des inégalités ont pu être relevées, notamment face aux **pays ACP**. Tel est le cas par exemple du surcoût de la canne, des intrants nécessaires au fonctionnement de l'exploitation agricole ou encore de la main-d'œuvre. Ce surcoût pèse sur la filière du fait des contraintes réglementaires plus strictes liées à la fabrication, à l'environnement, aux normes sanitaires nationales et européennes. Toutefois, ces mesures sont remises en cause régulièrement : accordées pour une durée limitée, leur renouvellement est potentiellement menacé (encadré 6).

En France, les boissons alcoolisées font l'objet d'une réglementation stricte et spécifique en termes de fiscalité. Elles sont soumises à trois taxes ou cotisations :

- les droits indirects ou droits d'accises (taxe spécifique) qui porte sur le volume d'alcool commercialisé ;
- la cotisation de sécurité sociale ou vignette (taxe spécifique) qui porte sur le volume d'alcool commercialisé ;
- la TVA (taxe non spécifique aux alcools).

Encadré 7. Le contingent : un régime fiscal dérogatoire pour le rhum



La vignette de Sécurité Sociale

La loi de finances de la Sécurité Sociale 2019 a instauré un alignement du taux de vignette sociale pour les rhums produits et consommés en Martinique (et en Outre-mer) sur celle des spiritueux produits dans l'Hexagone. Cette augmentation doit s'étaler sur 6 ans à partir de 2020. Selon le gouvernement l'alignement de la fiscalité du rhum se veut une solution à un problème de santé publique.

Cette mesure portera le montant de la cotisation sur les boissons alcooliques de 40 € par HAP à 557,90 € en 2026. À plein régime, cette mesure pourrait coûter aux professionnels du rhum 2,5 % de leur chiffre d'affaires par an.

Ainsi, des années de mauvaises récoltes, des retards dans le versement des aides européennes, des restrictions administratives et la concurrence étrangère mettent les professionnels en grande difficulté.

2. New challenges for agricultural rum

The commercial advances of agricultural rum in general and Martinique agricultural rum in particular are undeniable. However, they represent only a small share of the national and global rum market dominated by light industrial rums dedicated to cocktails. Therefore, Rhum Agricole Martinique must meet a number of challenges in order to resist competition and develop all its potential.

2.1. The cane industry and the environment

Sugar cane is one of the crops that produces the most biomass and contributes the most to fixing carbon in the soil, due to the importance of its root biomass. Sugar cane is one of the crops that returns the largest amount of carbon annually to the soil, estimated at 1.2 tons of carbon per ha per year (CIRAD, 2016).

good carbon footprint is to be qualified by the emissions related to rum production, especially by combustion.

It is an effective weapon against air pollution and sand mist, two scourges that regularly poison the lives of Martiniquans. It does not require irrigation, it can be grown in southern municipalities with a relatively dry climate, and its cultivation does not cause soil erosion. In addition, since the AOC, 85% of the fields are harvested "in green" (without slash-and-burn), by hand or by machine.

Document 9. Harvesting the cane



Cane harvesting: manual (left) and mechanized (right). Pictures: Yves-Marcelle Richer.

Organic cane farming is developing in Martinique by structuring itself mainly around the DEPHY network. Since 2013 a dozen sugar cane growers have joined the DEPHY-ecophyto network (Demonstration, Experimentation and production of references on systems that save on phytosanitary products) which aims to disseminate alternative practices to plant protection products and new viable agroecological methods.

The preservation of the surrounding environment is also an important concern displayed by Martinican companies. It stems on the one hand from the application, from the 1990s, of the new laws in force at national level and then at European level, but also from the pressure exerted by demographic densification in the immediate vicinity of distilleries.

All distilleries and sugar refineries are classified IPCE (Installation Classified for the Protection of the Environment). They are therefore subject to numerous regulations for the prevention of environmental risks, particularly in terms of gaseous and aqueous discharges. As a result, the seven smoking distilleries in Martinique are subject to very strict controls in terms of the technical requirements imposed on classified installations.

The rum industry is one of the only ones to be energetically autonomous. The use of renewable fuel bagasse for boilers or thermal power plants is an advantage. Indeed, 1 ton of harvested cane generates 300 kg of bagasse likely to produce 130 kWh. Vinasses are used as a spray in sugar cane fields.

Finally, the European Union, through the 2018 directive, imposed new standards in terms of ecological transition, which require the purchase of new boilers. These standards require an investment of "8 to 10 million euros per distillery, while we emit only 5% of the fumes and we operate (...) four months a year. Europe is giving medium-sized distilleries like La Mauny or Simon until 2025 to buy this boiler. Small units like Neisson have until 2030," explains Charles Larcher (CODERUM).

2.2. Strategies for resistance to competition

New marketing strategies: the "excellence approach"

If we are to believe the players in the sector, Martinique rum has been seeking excellence for more than a century. It started as early as the XIX^e century with the creation of agricultural distilleries, then the island led a second stage with the mastery of the aging process. The third stage allowed the obtaining of the Red Label in 1973 and finally in 1996, the establishment of the AOC. This so-called approach of excellence in the enhancement of production and structures has been possible thanks to significant investments, participation in fairs in France (in 2020 at the General Competition of the Salon de l'Agriculture, AOC agricultural rum has obtained 19 gold medals), in Europe and around the world, and by more superficial innovations such as *packaging* and *marketing* in order to improve the image of brands. This approach also targets distribution in large and medium-sized supermarkets (GMS), but especially in specialized distribution networks: CHR (cafes, hotels, restaurants), high-end bars, cellars, *drugstores* and *duty free* shops.

"Positioning" and "premiumisation": a cultural revolution

This strategy aims to place Martinique rum among the "super premium" or even the "Ultra premium" namely the most expensive rums. It is indeed the category of spirits that is growing the most on the world markets. Old rum, in particular, plays the AOC card with consumers looking for original products, with controlled traceability. The development strategy also involves innovations such as the organic approach, the white vintage or old *single cask* (selected from a single barrel) and *finish* (maturation several months in barrels that have contained another spirit: whisky, cognac ...). Finally, new communication and sales technologies (Facebook, websites, blogs) are essential elements of this evolution.

2.3. Rum: a major asset of spiritourism

Spiritourism in Martinique responds to a double patrimonial and economic challenge.

Patrimonialization and tourism

Spiritourism is this form of **tourism** that allows you to discover spirits through production sites, traditional know-how and specific trades. *"The production of spirits is associated with a terroir and is strongly linked to the local economy, jobs and various activities such as the preservation of agricultural and heritage landscapes."* says Magali Filhuc, Director General of the French Federation of Spirits (*Les Echos*).

In 2019, of the 963,900 **tourists** who landed on the island, **about 600,000 visitors visited the fifteen sites of the sector open to the public** (**document 4**). According to Charles Larcher, the objective is to *"reach a tourist rather interested in heritage, culture, know-how, local product, nature"* (Outremer360). Indeed, in a world where the standardization of lifestyles is the rule, the traveler is increasingly looking for the authenticity and peculiarities of the country visited. The agricultural distillery, once considered endangered, now seems to meet an expectation both among tourists visiting Martinique and for residents. Thus spiritourism arouses both flows of internal visitors and flows of passing tourists.

Document 10. Small tourist train

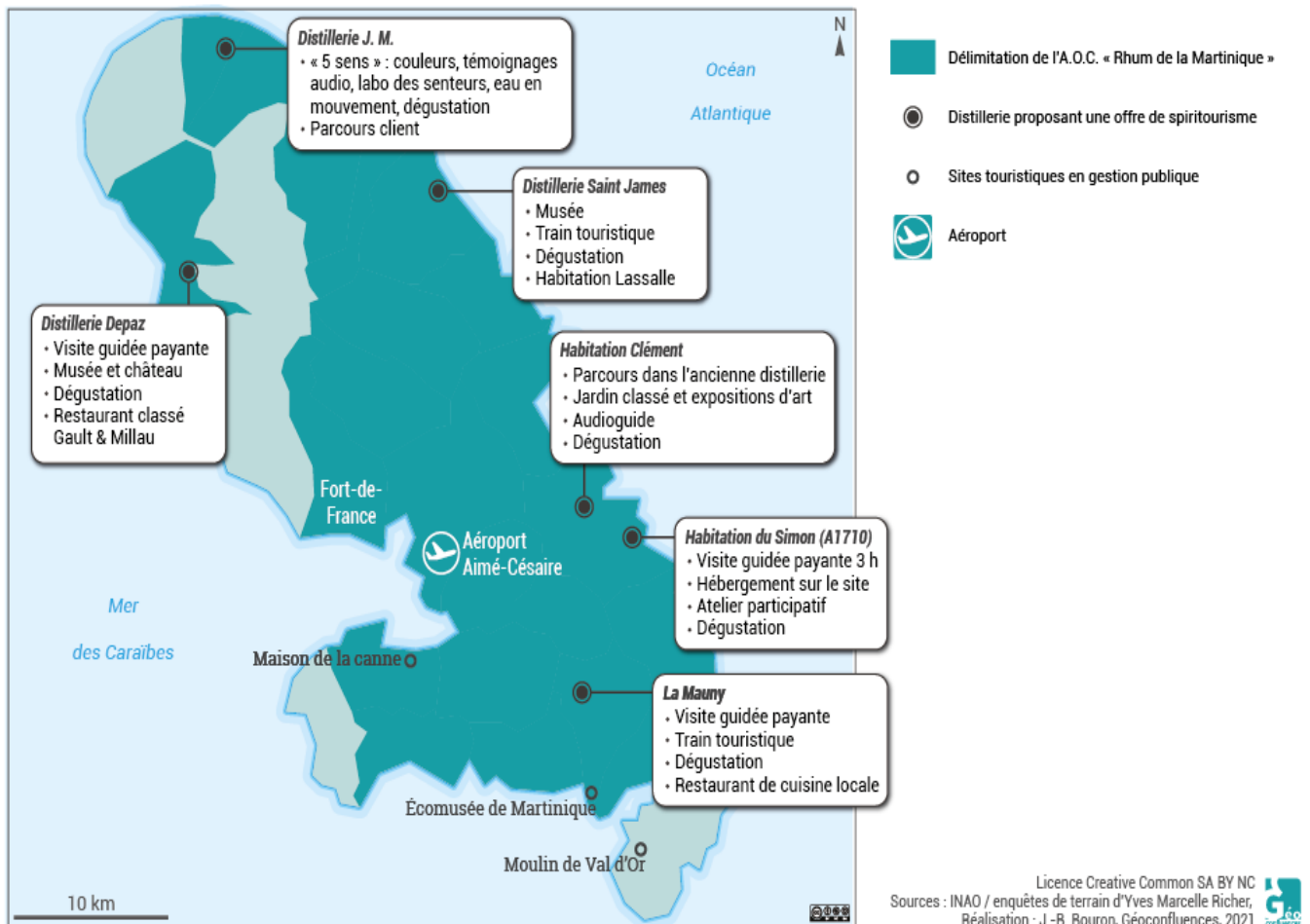


For Michel Fayad, director of the Musée du Rhum, rum "*conveys various facets of the island's history and thus brings together all the advantages of a flagship tourist product. It can be a unifying product of which Martiniquans are proud*" (interviews). More than just a drink, it is a part of the local culture that is transmitted in the same way as creole literature, gastronomy and the yole of Martinique (inscribed in December 2020 in the intangible cultural heritage of humanity by **UNESCO**). Rum thus represents a vector for the enhancement of Martinique's tourist **heritage**.

From the beginning of the 1990s, in parallel with the purely economic activity linked to the AOC, another aspect of the **reevaluation of distilleries** was put in place. The purpose of this movement was to **enhance production units as a built heritage, buildings with cultural significance and worthy of preservation**. The owners and more broadly a number of Martiniquans have become aware that the industrial sites that remain today constitute the last elements of an ancestral heritage, that they are witnesses of their history and that it is appropriate to attribute to them a heritage importance, especially since most distilleries are survivals of sugar dwellings, the oldest dating from the XVIII^e century (La Mauny 1749, Dillon 1787).

The reappropriation of identity of the various elements of this activity seems to find an increasingly broad tacit consensus. The thousands of Martinican visitors who go to the various events organized in the distillery grounds (rum festival, end-of-harvest festival, exhibitions...) are proof of this.

Document 11. Development strategies in spiritourism implemented by some distilleries



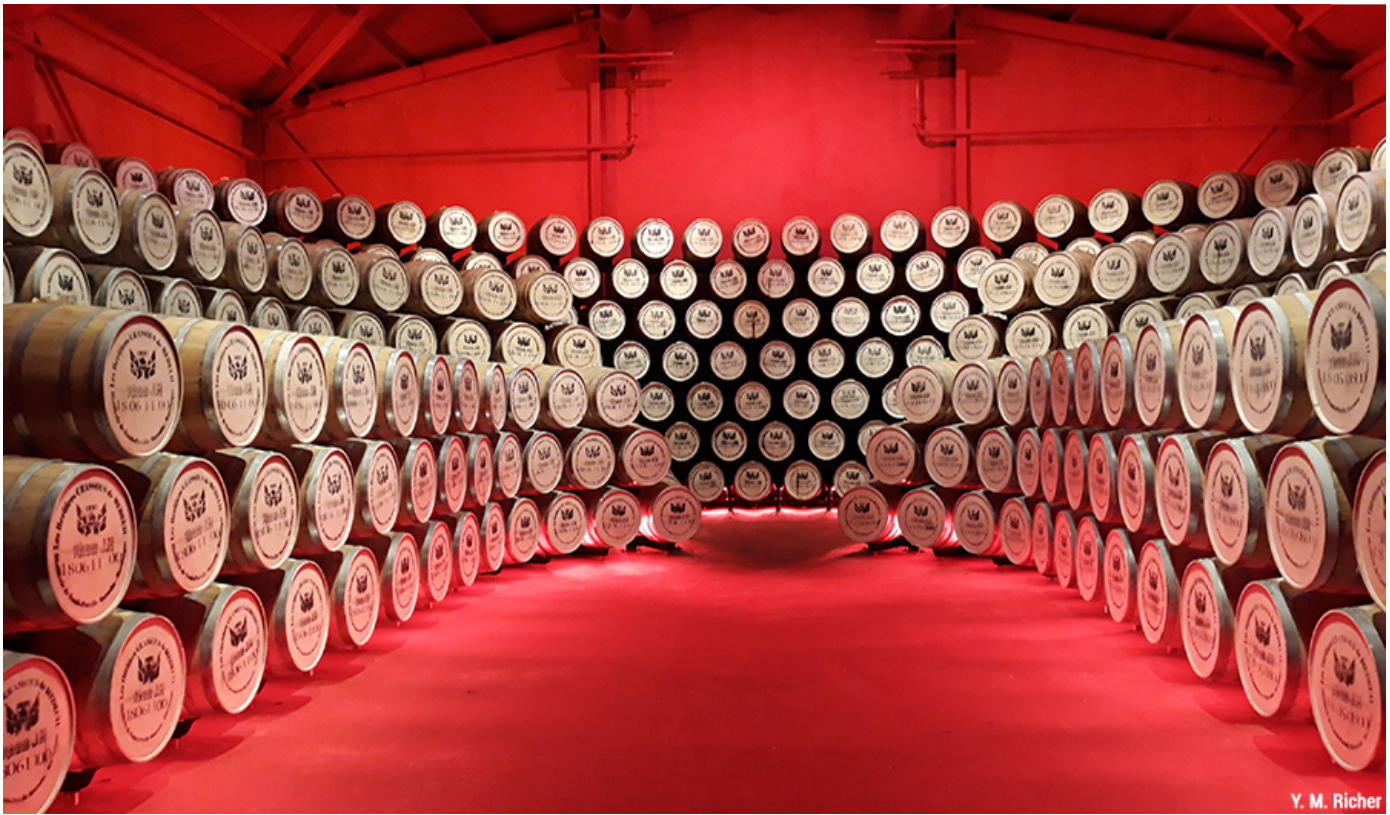
Visiting areas

In addition to the rum or sugar production unit, the tourist visit includes the annex buildings and surrounding areas. Among the residual constructions of the Habitations, some sites offer to visit the mansion: this is the case at the Habitation Clément, the Château Depaz, or the Saint-James Rum Museum.

Some sites have set up additional leisure areas: for example, the Habitation Clément has a landscaped park that offers an exhibition of sculptures, and the Saint-James distillery and the Mauny offer a train excursion. Tourists can be welcomed in the fields and thus access both the agricultural part of rum production (cultivation and harvesting of cane) and its industrial part (grinding, distillation ...). These investments in the production tool, as well as in the construction of tasting areas, have allowed distilleries to become major sites of spiritourism. Most distillery tours are free. Other heritage sites, in connection with the cane sector, are part of the itineraries organized by tourism professionals such as the Rivière-Pilote ecomuseum or the reconstruction of the Val d'Or cane mill in Sainte-Anne (document 11). These visits have an educational dimension because it is also a question of explaining the functioning of the AOC and the process of making rum.

Two-thirds of visitors are cruise passengers and French from France, often accompanied by locals. In addition, half of the 4 million liters sold each year in Martinique are bought by tourists, whether in supermarkets, wine merchants, *duty free*, or in shops on production sites.

Document 12. Visual enhancement of aging chaix



Y. M. Richer

The year 2020: a snag to the development of spiritourism

The period of confinement that began in March 2020, in the middle of the peak tourist season, resulted in the closure of cafes, hotels and restaurants as well as the decrease in visitor flows. Attendance was almost zero in April (-97%) and fell by more than 60% in the other months. Spiritourism has been hit hard by the decline in tourist attendance.

Document 13. Difference in tourist attendance in Martinique in 2020 compared to 2019



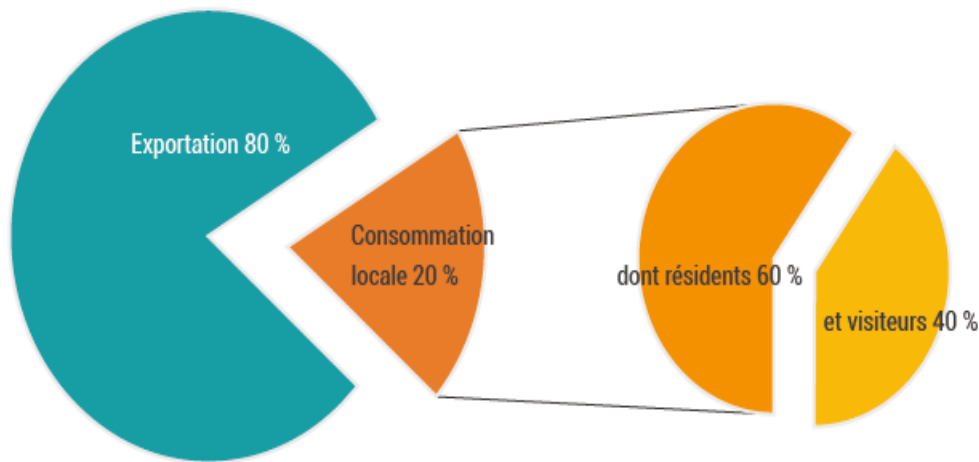
Source: Martinique Tourism Committee.

Export image

Consumption in the local market during the lockdown decreased by 40%, which shows the share of visitor consumption. Nevertheless, the actors of the sector are refining projects in order to integrate into the tourist circuits the other sites and places of memory related to the sector. The deployment of spiritourism would eventually create jobs and new niches of tourism products.

In December 2017, the Martinique Tourism Committee (CMT) and the Rum Organizing and Defense Committee (CODERUM) launched a strategy to develop "spiritourism" in Martinique. In partnership with the Territorial Collectivity of Martinique (CTM), the two organizations are aiming for one million "spiritourists" by 2022.

Document 14. Distribution of rum released for consumption in 2020



Source: CODERUM.

Conclusion

The AOC label has contributed to making agricultural rum a major element of Martinique's economic and tourism development. But not all problems are solved. Professionals in the sector must face the insufficiency in volume and yield of the raw material that is sugar cane, subject to climatic hazards for about ten years.

In addition, recent legislative, normative and fiscal developments at both national and European level clearly show an inadequacy to the realities of small island countries. This deterioration of measures to protect rum trade at the national level, in a highly competitive environment, weakens production and undermines the competitiveness of this spirit both locally and internationally.

However, new strategies aim to enhance the know-how of the players, the specificity of rum production, in order to optimize the profitability of the AOC Martinique label. They are based on an approach of excellence, innovations in the enhancement of the product in order to improve the image of the brands, as well as on new distribution channels.

Finally, one of the assets of the communication around rum is based on its tourist valorization within the framework of spiritourism. Martinique Agricultural Rum being a flagship product, consumers who want to know its place of manufacture, can thus discover the related heritage. The spiritourism of rum, already practiced in all distilleries, which have become real tourist sites, is the subject of a common policy involving all public and private actors.

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Keywords

Find the keywords of this article in the glossary: [Appellation d'Origine Contrôlée](#) | [DROM-COM](#) | | [heritage spiritourism](#) | [terroir](#) | [tourism](#)

[1] COREDUM is the Martinique Committee for the Organisation and Defence of the Rum Market, an interprofessional association founded in 1960.

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To quote this article:

Yves-Marcelle Richer, "[Martinique: from the sugar island to the island-terroir](#)", *Géoconfluences*, June 2021.

URL: <https://geoconfluences.ens-lyon.fr/informations-scientifiques/dossiers-regionaux/france-espaces-ruraux-periurbains/articles-scientifiques/martinique-filiere-rhum-canne/>

Back to top