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Global Preparatory Meeting for a Consultation on
the Food-Processing Industry

Vienna, Austria, 8-12 January 1979

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REPORT

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INTRODUCTION

1. The Second General Conference of UNIDO, held at Lima, Peru, in March 1975, recommended that UNIDO establish a system of continuing consultations between developed and developing countries.
2. One of the priority sectors mentioned in the Lima Declaration and Plan of Action is the development of efficient agro-industries by securing an effective and viable link between agriculture and industry with the objective of achieving a high degree of integration and interaction between these two sectors of the economy in the developing countries.
3. UNIDO had already organized two global consultation meetings related to the agro-industrial sectors. They were:

First Consultation Meeting on the Leather and
Leather Products Industry
held in Innsbruck, Austria, 7-11 November 1977

and

First Consultation Meeting on the Vegetable
Oils and Fats Industry
held in Madrid, Spain, 12-16 December 1977.

4. At its 12th session in May 1978, the Industrial Development Board instructed the Secretariat to, inter alia, proceed as a priority with preparations for a consultation meeting on the agro-based industries sector "with the view to convening a consultation meeting on agro-based industries in 1980, if approved by the Board at that session."
5. The principal agro-based industries are: food-processing industries, the leather and leather products industry ^{1/}, the textile industry and

^{1/} A Consultation Meeting on Leather and Leather Products has already been held in Innsbruck, Austria, from 7 to 11 November 1977.

the wood industry. A draft world-wide study, which has reviewed the various branches of the agro-based industry, concluded that the food-processing group of industries form the major part of the agro-based industry, accounting for 57% of their output. The principal branches of the food-processing industry are: meat and meat-processing industry, dairy industry, fisheries industry, cereal industry, sugar industry, vegetable oils and fats industry ^{2/}, animal feed industry, fruits and vegetable industry, beverage industry (including tea and coffee), and chocolate and confectionery industry.

6. The purpose of the Global Preparatory Meeting is to discuss and advise UNIDO on the following:

- (i) Whether a consensus exists among developed and developing countries for convening a consultation meeting in 1980 -
 - (a) on the food-processing industry as a whole; or
 - (b) on a given sub-sector of the food-processing industry (such as meat and meat-processing industry, dairy industry, cereals and roots);
- (ii) Whether on the basis of the selection made under (i) above, two or three specific issues could be identified for further elaboration prior to being discussed at a consultation meeting.

^{2/} A Consultation Meeting on Vegetable Oils and Fats has already been held in Madrid, Spain, from 12 to 16 December 1977.

CHAPTER I. ORGANIZATION OF THE MEETING

Opening of the meeting

7. The Global Preparatory Meeting for a Consultative Meeting on the Food-Processing Industry was held at UNIDO Headquarters, Vienna, from 8 to 12 January 1979. The meeting was attended by 24 expert participants from 22 countries and 10 representatives of 9 international and regional organizations and professional and labour associations:

8. The session was opened by M.M. Aref, Chairman of the UNIDO Task Force on Agro-based Industries, and Head, Agro-Industries Section, Industrial Operations Division, who welcomed the participants and hoped that their deliberations will guide the work of the Secretariat in this sector so crucial to the well being of humanity.

Election of the chairman and vice-chairman

9. The meeting elected I.A. Akinrele, Deputy Director, Centre for Industrial Development (ACP-EEC Convention of Lome) in Brussels, and Norman W. Tape, Department Secretary, Food Production and Marketing Branch, Agriculture Canada, as Chairman and Vice-Chairman respectively. The meetings were chaired alternatively by the Chairman and the Vice-Chairman.

Adoption of the agenda

..... 10. The agenda was adopted as proposed (please refer to Annex 2).

Adoption of the report

11. The draft report of the meeting was adopted by the meeting at its morning session on 12 January 1979.

Statement by the Secretariat

12. The meeting proceeded to consider the documents prepared for the Secretariat by UNIDO consultants - the regional analysis papers on the food-processing industry in Asia, Africa, and Latin America as well as the synthesis paper which assesses the food-processing industry bearing in mind the regional priorities and the constraints affecting the sector.

13. The UNIDO consultants emphasized the problems and priorities facing each region: in Africa, there was the need for integrated development on three broad fronts - cereals, meat and dairy products in order to minimize Africa's dependence on basic food imports; in addition, the installation of food processing equipment machinery (including packaging) adapted to local African requirements should be a priority consideration. In Asia, one of the main requirements is the rationalization of the rice milling industry and to preserve the protein-rich bran for animal feeding stuff manufacture. The Latin America area is marked by the availability of a successful and sophisticated food-processing industry together with some food equipment industry and the inroads of TNCs. Although the region is specialized in meat processing, cold storage systems are still below requirement level.

- 1 -

CHAPTER II. THE SELECTION OF THE TOPICS
FOR A CONSULTATION MEETING OF THE FOOD-PROCESSING SECTOR

14. There was a lengthy and constructive exchange of views on the specific subject of a consultation meeting on the food-processing sector - i.e. whether it should examine the food-processing sector as a whole, or whether it should confine itself to consider specific sub-sectors such as cereals and roots, dairy industry, and meat and meat-processing industry. Significant views were expressed on each approach.

15. Several participants expressed the view that to deal with the broad subject of the food-processing sector as a whole at a consultation meeting in 1980, would open up or suggest certain issues common to and facing all developing countries such as the vital issue of the integration of agriculture and industry, and the establishment of an efficient packaging and food processing machinery industries. They also stated that it would be possible to proceed from the food-processing sector in general to an in-depth examination of problems confronting specific sub-sectors such as meat, dairy or cereals. Other participants took the view that an action-oriented approach was preferable and that particularly in view of the time constraints this would best be served by proceeding on a sub-sectoral wide basis.

16. It was suggested that a fundamental advantage in examining the broad spectrum of food-processing industry is that certain issues would emerge concerning other sub-sectors. Many participants felt the need for developing countries to decide whether food-processing industries should be established or strengthened for internal consumption or for the purpose of export promotion. The meeting was informed that the ASEAN countries are emphasizing food processing for internal consumption to meet now nutritional requirements and to deal with waste products. Although different development strategy would be required to achieve these objectives, the general consensus was that whatever approach is

selected, the basic aim would be to obtain a greater share for developing countries in the food-processing sector in the next 20 years in conformity with the Lima Declaration and Plan of Action. In this connexion, it was pointed out by several participants that not only should the basic food need of rural and urban population be satisfied, but also that the earnings from exports of processed foods should be considerably increased during the coming decade.

17. In light of the similarity of issues to be raised by an examination of the individual food-processing sub-sectors, the meeting decided unanimously in favour of having a consultation meeting in 1980 on the food-processing sector as a whole; the meeting also felt that the consultation meeting, based on the issues presented and conclusion reached, should then select the sub-sectors of the food processing on which subsequent consultation meetings should be held.

CHAPTER III. ISSUES IDENTIFIED FOR CONSIDERATION AT A
CONSULTATION MEETING ON THE FOOD-PROCESSING SECTOR

18. Several issues were presented by participants for elaboration by the Secretariat in preparation for consideration by the Consultation Meeting. These issues were grouped under four broad headings covering measures for implementing the integrated agro-industries approach in developing countries, for increasing the food-processing capability and technology needs in developing countries, development of improved marketing and distribution, and the required technical and economic collaboration between developed and developing countries and among developing countries themselves needed to achieve the goals of the developing countries in this sector.
19. The meeting identified certain major constraints which have hindered the development of an effective and dynamic food-processing industry in the developing countries. It was felt that the examination and the removal of these constraints through action measures to be recommended at a consultation meeting will positively contribute to ensuring not only the food requirements of the rural population but also the needs of urban and external markets.
20. Strong emphasis was however put on the need to establish an effective and workable link between agriculture and industry as a basic prerequisite for a dynamic food-processing industry and taking into account the market implications.
21. The participants felt that in formulating the issues (to be further elaborated by the Secretariat) and for consideration at the consultation meeting, attention should be given to the general constraints affecting the development of the food-processing sector in the developing countries and international, regional and inter-regional co-operation needed to overcome these constraints. The main problems identified were, inter alia:

- (a) Lack of co-ordinating mechanisms for the food industry at the national level;
- (b) Shortage of packaging manufacturing capacity: the need for the application of sophisticated technology such as tin plating;
- (c) Need for supply of raw material of suitable quality and adequate quantity;
- (d) Inadequate transport, storage and other infrastructural facilities;
- (e) Insufficient research and development and almost total lack of extension services, and training facilities at the national and regional levels;
- (f) Need for technology adapted to local conditions;
- (g) Need for quality control systems and food standards;
- (h) Shortage of food-processing machinery and equipment;
- (i) Need to raise the present low level of indigenous technology;
- (j) Need for the removal of tariff and non-tariff barriers to exports of processed foods to industrialized markets.

CHAPTER IV. CONCLUSIONS AND RECOMMENDATIONS
BACKGROUND JUSTIFICATION FOR THE SELECTION OF ISSUES
TO BE CONSIDERED AT A CONSULTATION MEETING ON FOOD PROCESSING

22. Having selected the food-processing sector as a whole as the subject for a consultation meeting, the Global Preparatory Meeting on Food-Processing has selected the following issues and identified the background justification for these issues.

I. STRENGTHENING OF THE FOOD-PROCESSING INDUSTRIES THROUGH INTEGRATED DEVELOPMENT OF ALL SECTORS OF THE FOOD PRODUCTION, PROCESSING, AND MARKETING CHAIN

23. The development of a viable link between industry and agriculture would have positive effects on both sectors especially assuring a stable long-range market for agriculture and for the upgrading of the food-processing industry.

Some priority areas for action/consideration:

- (a) Creation of an appropriate national co-ordinating body to harmonize existing and proposed policies affecting food processing - e.g. policies in production, labour, marketing, transportation, health, nutrition, inspection and training.

Justification

24. Many examples of failed production due to unilateral action by one sector of the food chain with resultant damage to farmers, processors, input supplies, etc.

- (b) Ensuring consistent supply of raw material for food-processing sector.

Justification

25. Regular supply of material of agreed quantity and quality must be assured. Income assurance programmes for raw material suppliers may be necessary. Full co-operation with FAO is essential in this area.

- (c) Strengthening packaging manufacturing capability in developing countries - paper, glass, flexible packs, cans, etc. Possibility of regional development should be considered.

Justification

26. Excessive dependence on industrialized countries, although raw materials are largely available in developing countries. Improved availability and hopefully assured supply for local manufactures.

- (d) Manufacture of basic food processing equipment in developing countries.

Justification

27. Reduction of dependence on imports and saving of foreign currency. Also making use of existing workshop facilities, and the creation of suitable new ones.

II. STRENGTHENING FOOD-PROCESSING CAPABILITY AND MEETING TECHNOLOGY NEEDS IN DEVELOPING COUNTRIES

28. There is urgent need to assist developing countries in establishing and strengthening food industry research development and extension services to, inter alia, support the emerging food industry in the following areas:

- (a) Up-grading existing small-scale processing methods (cottage industry) and where appropriate to expand them to factory scale e.g. production of kenkey, gari, soya products.

Justification

29. Much food processing in developing countries is undertaken in rural areas by methods which are extremely slow and wasteful. A high priority attaches to the provision of improved technology which will reduce drudgery and waste in these operations whilst improving the quality and safety of the products. In many situations, it will be appropriate to proceed from cottage industry level to factory level processing and this will lead to economies of scale and to the production of a more stable and more standardised products.

- (b) As appropriate, adaptation of medium and large-scale industrial processes to smaller-scale units suitable for production in national markets and for anticipated export.

Justification:

30. In factory processing, there will often be a need for equipment and technologies which are derived from existing sophisticated methods of processing as used in large-scale operations in developed countries. It will be necessary to adapt these to local conditions, whilst retaining their desirable operational characteristics.

- (c) Development of new or modified products with potential to create new markets.

Justification

31. There is scope also for the development of new products by application of existing and new methods of processing to a range of tropical products.

- (d) Development of training facilities for technicians and supervisory/management personnel. This can be done through existing national or regional food institutes or by establishing new ones. These institutes will provide extension and consultancy services and serve as centres for exchange of technical information.

Justification:

32. To sustain these developments, large numbers of trained personnel of various types are required. There is at present an acute shortage of trained personnel and high priority must be given to the expansion of existing training programmes and the creation of new ones.

- (e) Application of suitable quality standards for all products and hygienic procedures.

Justification:

33. Products produced by the food-processing industries must conform to approved standards to protect the interests of consumers in the developing countries and to enable the industries to secure their place in the export markets.

(f) Work towards upgrading the nutritive value of processed foods.

Justification:

34. There is extensive malnutrition in many developing countries and it is essential that the nutritive value of foods processed be retained or, where possible, enhanced during processing. Methods of processing currently used frequently result in loss of nutritive value, and these must be replaced by more appropriate methods. It is essential to remember, however, that in effecting improvements in nutritive value the characteristics of the product must conform to local taste preferences.

III. DEVELOPMENT OF IMPROVED MARKETING AND DISTRIBUTION

(a) Need to strengthen the national capability to store, transport and distribute finished food products

Justification

35. As the present system of storage, transport and distribution has proved to be inadequate, the main concern at the national level would be to organise storage conditions, transport and the distribution network with a view to retaining the nutritional and quality properties of the food to meet not only national but export requirements as well.

36. In order to achieve this objective, it is desirable that developed countries provide support and close cooperation both at the national and international levels. This cooperation will take the form of provision of finance by international financial institutions and by extending assistance to the developing countries in setting up an adequate and viable infrastructural base so that the full benefit of value added can be realised. It is understood however that these arrangements would need to be harmonized with existing national and international arrangements.

(b) Access to export markets in developed countries and elimination of artificial trade barriers.

Justification:

37. It is recognised that there are tariff and non-tariff barriers existing on processed food products exported by the developing countries. These barriers may be raised by governments, by existing market structures, or by TNCs. Other barriers may be raised for reasons of the scale of production or for technical considerations such as escalation of freight rates. An analysis of the conditions for easier access to the world market will therefore have to take into account the work already carried out by international organizations, and will cover the following:

- (i) Proposal of measures to improve the conditions for access to the markets of the developed countries for processed food products from developing countries. These measures will be aimed at the elimination of barriers established by some governments, and of certain trade practices.
- (ii) Improvement in trade among developing countries.
- (iii) As far as possible, ensure the elimination of existing restrictive business practices.

Full co-operation with UNCTAD, ITC, and GATT is fundamental to this issue.

IV. EXPANSION OF TECHNICAL AND ECONOMIC CO-OPERATION BETWEEN DEVELOPING AND DEVELOPED COUNTRIES AND AMONG THE DEVELOPING COUNTRIES THEMSELVES

Justification:

38. An organization system of agro-industrial complexes in developing countries in relation to type of food demand needs to be developed. In order to remove the social, financial and technological constraints and to establish the dynamic relationship between markets, technology and labour, it is therefore necessary to identify measures for increasing technical and financial co-operation between the developing and developed countries and among the developing countries themselves.

The measures could include:

- (a) Steps to stimulate capital investment by local and international resources for the food-processing industry and for the introduction of appropriate technology;
- (b) Steps to strengthen the existing food-processing industries and establish new ones through an integrated approach from raw materials to marketing including exchange of know how, type of equipment, management techniques, etc.;
- (c) Steps to develop and/or establish suitable research and training facilities in particular in-plant training at regional level to assist in identification and solution of food-processing problems on the basis of regional priorities.

A N N E X 1

LIST OF PARTICIPANTS

ARGENTINA

Oscar E. PINNOLA
Director Ingenieria Ventas Exterior
Meitar Aparatos S.A.
25 de Mayo 2567
3000 Santa Fe

BRAZIL

Hugo POETSCH
Director
Agapê S.A. (Industria da Alimentação)
Av. Salgado Filho 641
Pelotas R.S.

CANADA

Norman W. TAPE
Department Secretary
Food Production and Marketing Branch
Agriculture Canada
Sir John Carling Building - Carling Avenue
Ottawa, Ontario K1A 0C5

EGYPT

Abdel Noman EL-MEHELMY
Head of the Central Administration of Technical Affairs
General Organization for Industrialization (GOPI)
6 Khalil Agha Street - Garden City
Cairo

FRANCE

Serge C. MOHNOT
Ingénieur en chef du génie rural
Adjoint au Directeur des industries agricoles et alimentaires
Ministère de l'Agriculture
3, rue Barbet de Jouy
75007 - Paris

GHANA

Benjamin Lartey LARTEY
Head, Engineering Division
Food Research Institute
Council for Scientific and Industrial Research (CSIR)
P.O. Box M 20
Accra

HUNGARY

István OZORAI
Head of Department
Ministry of Agriculture and Food
Budapest

INDIA

C. P. NATARAJAN
Director
Central Food Technological Research Institute
Mysore 13
India 510013

INDONESIA

Budi SAMPURNO
Chief, Sub-Division of Information
Ministry of Agriculture
29 Jl Imam Bonjol
Jakarta

IRAQ

Talib HERKIZ-ISSAC
Technical Expert
State Organisation for Food Industry
P.O. Box 2301
Alwiyah - Baghdad

Kamber RAJAB
Manager, Food Projects Division
State Organisation for Industrial Design and Construction
Ministry of Industry and Minerals
Baghdad

KENYA

J. N. SHAH
Managing Director
Trafods Ltd
P.O. Box 41521
Nairobi

MEXICO

Edmundo ARIAS
Head of Biotechnology Section of LANFI
Av. Ind. Militar 261
Mexico 10, D.F.

MOROCCO

Abdellatif MOUMILE
Directeur de l'industrie
Ministère de l'industrie
Rabat

NETHERLANDS

Pieter SLIS
Director of Division for Processing and Marketing Agricultural Products
Ministry of Agriculture and Fisheries
Besuidenhoutseweg 73
Den Haag

REPUBLIC OF KOREA

Kwang Hoon PARK
Deputy Director
Food Research Institute
Agriculture and Fishery Development Corporation (AFDC)
Seoul

SUDAN

Babiker BESHIR
Director, Food Research Centre
P.O. Box 213
Khartoum North

THAILAND

Amara BHUNTRATANA
Director and Professor, Food Research and Product Development
Kasetsart University
P.O. Box 4-170
Bangkok 4

TUNISIA

Rachid TEKAYA
Chef de service des industries agricoles et alimentaires
Ministère de l'industrie
Tunis

UNITED KINGDOM

David ADAIR
Head of Industrial Development Department
Tropical Products Institute (Ministry of Overseas Development)
56/62 Grays Inn Road
London WC1

UNITED REPUBLIC OF TANZANIA

Alexander C. NOSEA
Director, Food Science and Technology
Tanzania Food and Nutrition Centre
P.O. Box 977
Dar-es-Salaam

UNITED STATES OF AMERICA

William W. ROBERTS
Head, Department of Food Science
North Carolina State University
P.O. Box 5992
Raleigh
N.C. 27607

Ira I. SOWERS
Executive Vice President
National Food Processing Association
1133 20th Street, N.W.
Washington DC, 20036

YUGOSLAVIA

Luka PETKOVIC
Vice President of Business Association of Agro-industrial
Combinates of Yugoslavia
Zagrebacka No. 9/2
Beograd

United Nations Commissions or Centres

UNITED NATIONS CENTRE ON TRANSNATIONAL CORPORATIONS (CTC)

Arthur DOMIKE
Senior TNC Officer
U.N. Centre on Transnational Corporations
United Nations
New York 10017, USA

United Nations Bodies

UNITED NATIONS CONFERENCE ON TRADE AND DEVELOPMENT (UNCTAD)

Kurt KWASNY
Manufactures Division

Leonarda BANKS
Commodities Division

United Nations Conference on Trade and Development
Palais des Nations
CH-1211 Geneva 10, Switzerland

Specialized Agencies

FOOD AND AGRICULTURE ORGANIZATION (FAO)

Axel CHARPENTIER
Chief, Meat and Dairy Service
Food and Agriculture Organisation
Via delle Terme di Caracalla
00100 Rome, Italy

WORLD BANK

Kathleen H. DI TULLIO
Economist
1818 "H" St., N.W.
Washington, D.C. 20043, USA

Inter-Governmental Organisations

CENTRE FOR INDUSTRIAL DEVELOPMENT (ACP-EEC CONVENTION OF Lomé)

I.A. AKINRELE
Deputy Director
Centre for Industrial Development (ACP-EEC Convention of Lomé)
Avenue Georges Henri, 451
1200 Brussels, Belgium

Inter-Governmental Organizations (continued)

COMMISSION OF THE EUROPEAN ECONOMIC COMMUNITY (EEC-COMMISSION)

Bruno H. SÜSSMILCH
Administrateur principal
Direction générale de l'Agriculture
Berleymont Building
200 rue de la Loi
B-1049 Bruxelles, Belgique

ORGANISATION FOR ECONOMIC COOPERATION AND DEVELOPMENT (OECD)

Daniel BERAUD
Principal Administrator
Directorate for Agriculture
2, rue André Pascal
75775 - Paris Cédex 16, France

Non-Governmental Organizations

EUROPEAN COORDINATION CENTRE FOR RESEARCH AND DOCUMENTATION
IN SOCIAL SCIENCES

Ion MIHAILESCU
Scientific Secretary
European Coordination Centre for Research
and Documentation in Social Sciences
Grünangergasse 2
1010 - Vienna, Austria

INTERNATIONAL CONFEDERATION OF FREE TRADE UNIONS (ICFTU)

Karl HUMMEL
Head of International Department of ÖGB
Permanent Representative of ICFTU to UNIDO
Hohenstaufengasse 10-12
1010 - Vienna, Austria

Consultants

Omar FODA
Chairman, Pyramid's Brewery
2 Therwat Street
Giza, Egypt

G. R. HOWAT
33 Windsor Gardens
St. Andrews, Fife KY 16 8XL
Scotland

András MIKLOVICZ
Head of Department
Secretariat for International Economic Relations
to the Council of Ministers
Kossuth L. tér 2-4
1357 Budapest, Hungary

Roberto H. MORETTI
Professor of Fruit and Vegetable Processing
F.E.A. - Unicamp
Caixa postal 1170
Campinas, S.P., Brasil

John A. R. TAINSH
c/o I.B.C.(GB) Ltd.
Bovre House, Boldre
SO4 8 ND Lyvington Hampshire
England

- - -

Secretariat of the Meeting

1. Moustafa ARIF
Chairman, Task Force on Agro-based Industries and
Head, Agro-Industries Section
Industrial Operations Division

2. Abdallah HACINI
Head, Negotiations Section
Division of Policy Co-ordination

3. Jorge R. SUCCAR
Head, Sectoral Studies Section
International Centre for Industrial Studies

4. H.K. RAHIM
Senior Industrial Development Officer
Negotiations Section
Division of Policy Co-ordination

5. F. LEFEBVRE
Industrial Development Officer
Negotiations Section
Division of Policy Co-ordination

6. A. FARINPOUR
Industrial Development Officer
Sectoral Studies Section
International Centre for Industrial Studies

ANNEX IX

AGENDA

1. Opening of the session
2. Election of officers
3. Adoption of the provisional agenda
4. Statement by the Secretariat:
 - (a) Regional Analysis Papers -

| | |
|----------------|---------------|
| Africa: | G.R. Howat |
| Asia: | J.A.R. Tainsh |
| Latin America: | R.H. Moretti |
 - (b) Comments by the consultant from the ECWA Region
 - (c) Synthesis Paper: G.R. Howat/A. Niklovics
5. Selection of the subject of the Consultation Meeting in the Food Industries field:
 - (a) Food processing as a whole. The role of an integrated agro-industry programme
 - (b) One of the following sub-sectors:
 - i. Meat and meat-processing industry
 - ii. Dairy industry
 - iii. Cereals and roots
6. Issues to be considered at the Consultation Meeting
7. Other business
8. Adoption of the report.

ANNEX III

LIST OF BACKGROUND AND COUNTRY PAPERS

- Draft World-Wide Study on Agro-Industries: 1975-2000
UNIDO/ICIS.65, 12 December 1977
Prepared by the International Centre for Industrial Studies
- Survey of the Food Processing Industry in the Asia Region
UNIDO/EX.61, 29 November 1978
Prepared by J.A.R. Painsch, UNIDO Consultant
- Report on Food Processing in Ethiopia, Kenya, Ghana and Senegal
UNIDO/EX.62, 29 November 1978
Prepared by P. Aylward and G.R. Howat, UNIDO Consultants
- Draft Assessment of the Current Situation and Projection of the Food Agro-Industries in the Latin American Region
UNIDO/EX.63, 7 December 1978
Prepared by J.P. Guzmán and R.H. Moretti, UNIDO Consultants
- Synthetic Paper - Food Processing Industries in Developing Countries
UNIDO/EX.60, 23 November 1978
Prepared by R. Howat, UNIDO Consultant

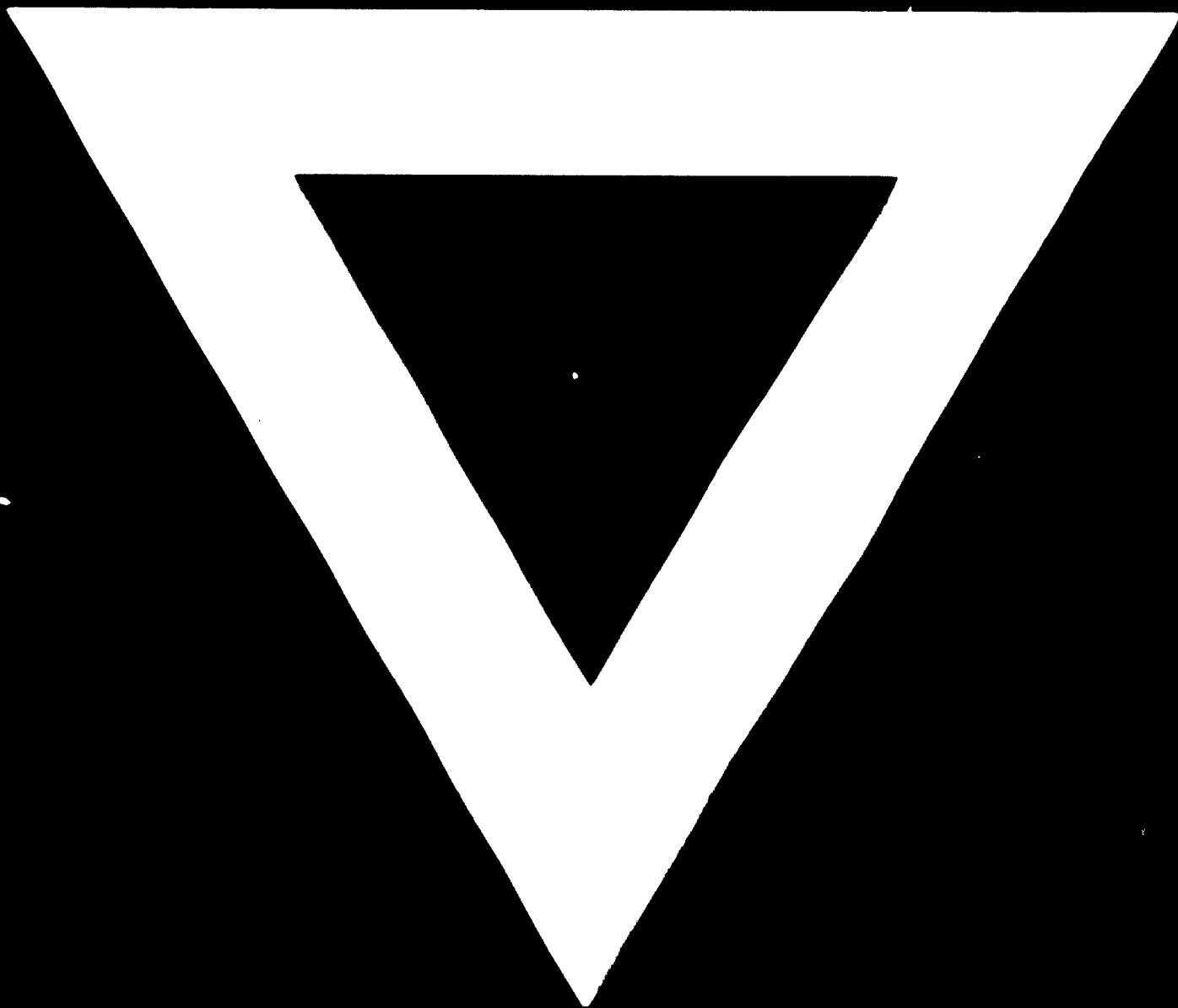
The following country and/or regional papers were distributed at the meeting (or submitted to the Secretariat of the Meeting):

- The Food Processing Industry in Tanzania (Report No. 320)
Submitted by A.C. Masha
- The Processing of Cassava, Palm Oil and Sugarcane in Indonesia
Submitted by Budi Sampurno
- Country's current and future plans for the development of the food-processing industry in the Arab Republic of Egypt
Submitted by Abdel Monem El-Mehelmy, Ministry of Industry
General Organization for Industrialization, Egypt
- Draft of Projects of the Five-Year Plan (1978-1982) (Food Industries)
May 1978
Submitted by Abdel Monem El-Mehelmy, Ministry of Industry
General Organization for Industrialization, Egypt

LIST OF BACKGROUND AND COUNTRY PAPERS (continued)

- Documentation Centre for Industries using agricultural products
November 1978
Submitted by Serge C. Monnot, Ministry of Agriculture, Paris
- Relationships of ICAI with other international organizations
Submitted by Serge C. Monnot, Ministry of Agriculture, Paris
- Production, value added and employment in food and beverage industries (SITC 311-3) by economic regions, 1975
Submitted by A. Domike, United Nations Centre on Transnational Corporations.

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