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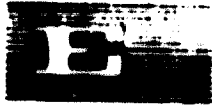
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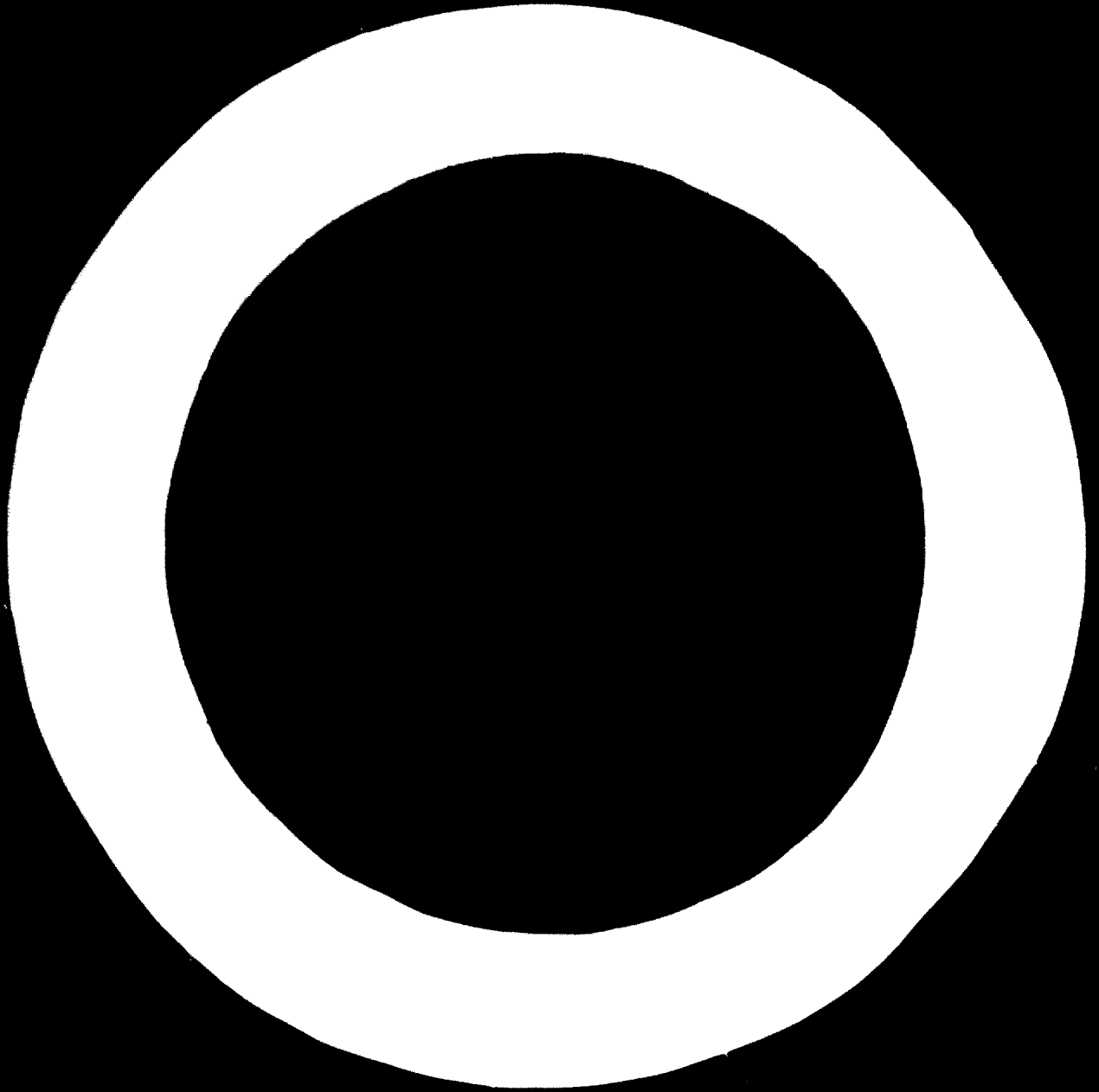
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ECONOMIC COMMISSION FOR AFRICA AND
CENTRE FOR INDUSTRIAL DEVELOPMENT
Symposium on Industrial Development in Africa
Cairo, 27 January - 10 February 1966

REPORT OF COMMITTEE II (SECTOR STUDIES)



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Engineering industries

1. The paper, Engineering Industries in Africa (E/CN.14/INR/AS/II/2.1 - in three parts with an addendum and corrigendum) was introduced by the secretariat and discussion took place in the first instance on the value to the economy of establishing a motor vehicle assembly industry. It was generally agreed that this industry made only a small contribution to the economy of a country and that it was necessary to proceed towards manufacturing. Some delegates, however, stressed the difficulty of establishing manufacturing. Four difficulties encountered in establishing the assembly industry were mentioned: experience showed that the training of operatives was difficult, the capital investment was relatively high and the cost of C.K.D. procedures was so high that vehicles assembled on the spot would in the end cost more than imported complete vehicles. There was also continued dependence on the supplying country for spares. It was generally agreed that as national markets were small, the manufacturing industry should be planned on a sub-regional basis. In this regard the need to arrive as far as possible at a standardization of parts was stressed.

2. With regard to engineering generally, the importance of establishing adequate design facilities in the countries undertaking manufacture was stressed in order to keep abreast with technical progress. Otherwise, factories based on imported equipment might soon become obsolete. While agreeing with the great importance of design, the secretariat expressed the view based on the experience of most developing countries that the normal progression in engineering was from assembly, usually under licence, to manufacture including design.

3. The ECA study was regarded as most welcome and opportune because of the rapid increase in imports of engineering goods and the meeting stressed the importance of co-operation between African countries in the development of the industry.

4. It was recommended:

(a) that ECA should continue its studies on the types of engineering works which could be established on a national, sub-regional and regional basis;

(b) that the various countries should within the framework of co-operation approach the industrialized countries of the world with a view to assisting African countries in promoting engineering factories.

Iron and steel

5. The paper, The Iron and Steel Industry in Africa (E/CN.11/AS/III/23) was introduced by the secretariat. Various countries outlined their plans for the development of the iron and steel industry. The Committee noted with satisfaction the co-operative efforts being made in the various sub-regions and welcomed the discussions now proceeding in West, East and Central Africa, and the Maghreb countries regarding the location and development of integrated works and re-rolling mills.

6. In the course of the discussion, the basic importance of iron and steel in the industrial development of Africa and the need to exploit the abundant iron ore resources of the continent were recognized.

7. It was generally agreed that in order to ensure ultimate profitability, long-term development of an iron and steel works should be properly planned;

otherwise, the works might become uneconomic and an obstacle to further economic development. The great economies of scale in iron and steel manufacture and the high investment required to establish an iron and steel works, ranging from US\$70 per annual ton for a simple re-rolling works to US\$350 for an integrated works making flat products emphasized the need for co-operation on a sub-regional or regional basis in the development of the industry.

8. It was recommended:

- (a) that ECA should give active technical assistance at the national, multi-national, sub-regional and regional levels in connection with the establishment and development of the iron and steel industry and that every effort should now be made to translate present plans into feasibility and engineering studies which might attract the necessary finance;
- (b) that the standardization of the specifications of semi-finished and finished products, in view of its importance to the future development of the iron and steel industry in Africa, should be studied by the ECA and submitted to the appropriate sub-regional organisations, due consideration being given to the need to conform to international standards;
- (c) that the proposed sub-regional iron and steel authorities should be established as soon as possible and that ECA should study in co-operation with these authorities the establishment of a regional African authority on iron and steel.

Aluminium

9. The paper, Africa and the Aluminium Industry, (E/CN.14/AS/II/2/3), was introduced by the secretariat. In this paper the great possibilities for

the development of the aluminium industry were referred to, in particular in West Africa, Central Africa, and to a lesser extent in North Africa and East Africa.

10. In the course of the discussion the view was generally expressed that consumption would be increased considerably above the level forecast in the paper. In this connection, it was recommended that a greater and more varied use of aluminium, both inside and outside Africa, and in particular in the construction of buildings, should be given serious consideration.
11. It was recognised that because of the present low level of African consumption, the main outlets for the products of an aluminium industry compatible with African resources of bauxite and hydro-electric power were the markets of the developed countries of the world and it was suggested that in view of the tight control of these markets the subject should be discussed at the forthcoming world symposium. In this connection, it would be necessary for Africa to present a united front.
12. It was recognised, however, that efforts should also be made to promote the increasing use of aluminium in African countries with due regard to the interests of African producers of other metals and that the measures proposed in the paper would contribute to this end.
13. It was recommended:
 - (a) that the need for African countries to secure a greater share of the world market for aluminium in accordance with their enormous resources of bauxite and hydro-electric power should be urged at the forthcoming world symposium on industry;
 - (b) that institutions should be established at the appropriate level to promote the use and manufacture of aluminium by African

countries, having regard to the producers of other metals, to facilitate co-operation in the development of the industry and to assist in securing a share in markets abroad.

Chemicals

14. The secretariat introduced document E/CN.14/AS/III/22. This was followed by a lively discussion.
15. Some delegates gave detailed accounts of the chemical industry in their respective countries. It was noted that in North Africa the Maghreb countries had established machinery for co-operation in developing the chemical industry.
16. Several delegations brought to the attention of the meeting fertiliser and other chemical projects, being considered or undertaken in their respective countries. It was noted that the UAR were willing to share their experience accumulated during the establishment and subsequent operation of chemical plants and offer to help other African countries.
17. The lack of sulphur resources in the continent was discussed at length. The rising trend of world sulphur prices was noted and the possibility of using gypsum for the production of sulphuric acid was considered. It was generally agreed that the success of utilizing gypsum depended on the size of plant, cost of production, and the market potential of the co-product cement. It was recommended that countries conducting studies on the possibility of establishing sulphuric acid plants should consider the feasibility of using gypsum. In this connection, the secretariat was requested to make a comparative study on the production of phosphate fertilizers using sulphur, gypsum and the electro-thermal process.
18. The use of imported ammonia for the establishment of nitrogenous fertiliser plants was discussed. It was emphasized that consideration should be given to the desirability of developing the ammonia industry in the sub-regions or

region, whenever favourable conditions prevailed.

19. Trends in fertilizer consumption and production in Africa indicate that all the countries of Africa are not importers of fertilizers and the consumption of fertilizers will probably be inadequate to meet agricultural and food production needs for the population of Africa which is estimated to reach 346 million in 1970 and 449 million in 1980. Account must also be taken of the expansion of world demand and the necessity for some countries to valorise their export-oriented raw materials.

20. The problem of excess chlorine from chlorine-caustic plants was raised and it was agreed that a practical solution for its utilization should be studied within the framework of the sub-regions and region, in co-operation with ECA and UNOID.

21. With regard to medicinals and pharmaceuticals, delegates felt that this group has not been given the priority it deserves. The possibility of manufacturing pharmaceutical products which are still being imported was stressed. It was further stressed that quality control is essential. The preconditions given in document E/CN.14/AS/III/22 refer to the making of basic raw materials only.

22. Consideration was given to other branches of the chemical industry, such as plastics, rubber, insecticides, soaps etc. These were important industries and whenever conditions were favourable these branches should be vigorously followed-up by the countries concerned with the assistance of the appropriate UN agencies.

23. It was recommended:

- (a) that the ECA secretariat should continue to draw up a programme for multi-national, sub-regional and regional co-operation in the development of the chemical industry in co-operation with the countries concerned;

- (b) that ECA and UNOID carry out surveys and technico-economic studies of other chemical industries for example rubber, plastics, and insecticides and determine the needs and potential markets for such industries;
- (c) that priority should be given to:
 - (i) the manufacture of concentrated fertilizers both for local and export purposes, bearing in mind the great increase in population, availability and rational use of natural resources and their local valorization;
 - (ii) exploitation of Africa's hydro-electric potential and maximum use of manpower resources;
 - (iii) the development of the pharmaceutical industry;
- (d) that studies on the availability and possible utilization of certain raw materials should be undertaken, in particular on sulphur, pyrites, gypsum and natural soda ash, etc. ;
- (e) that a study on the possibility of using certain processes of production should be made:
 - (i) gypsum (natural or by-product) for sulphuric acid and ammonium sulphate making;
 - (ii) possibility of using hydrochloric acid in acidulation of phosphate rock and in the pickling of iron and steel;
 - (iii) other processes for maximising economic disposal of chlorine;
 - (iv) causticisation of natural soda ash;
 - (v) the Dual Process for soda ash production;

- (f) that training and applied research should be emphasized:
- (i) encouragement of students to take courses in the field of chemical engineering and training to chemical industry personnel;
 - (ii) creation of chemical engineering departments in universities and polytechnic institutes and strengthening of existing ones;
 - (iii) establishment of applied research and training centres for research and training respectively;
- (g) Miscellaneous:
- (i) that standardization of methods of classification of statistical data should be adopted, i.e., the Standard International Trade Classification (SITC) for import-export commodities and the International Standard Industrial Classification (ISIC) with details provided by SITC for industrial production;
 - (ii) that governments should promote use of fertilizers and pesticides;
 - (iii) that preference should be given to larger ammonia capacities rather than to small plants.

Forst-based industries and pulp and paper

24. The Symposium reviewed the document, Development of Forestry and Forest Industries in Africa (E/CN.14/AS/III/3), prepared by FAO, which drew attention to the vast forest resources of Africa comprising 15 per cent of the world forest area. In the discussion which followed it was noted that in the world market, excess capacity of certain grades of pulp and paper was expected to continue approximately to 1970.

25. The Symposium requested international organizations, FAO in particular, to assist the African countries in (a) conserving and surveying their forest resources, (b) planning and carrying out reforestation schemes, (c) developing local processing of wood raw materials into sawwood, plywood, pulp, paper, boards, etc., through feasibility studies and other means, (d) promoting intra-African trade in forest products, through market studies based on sub-regional and regional co-operation, (e) improving marketing and transportation of forest products and (f) expanding training facilities for forestry and forest industries personnel.

26. It was noted that certain non-wood products, such as gum arabic, associated with the development of forest industries, should also be considered in technical assistance programmes.

27. The importance of integrated and maximum utilization of closed tropical high forests was emphasized and attention was drawn to the fact that integrated forest industries are able to multiply the volume used and the value added in processing as compared with log exports.

28. It was recommended to expand the manufacturing capacity of forest products to promote exports above all of hardwood veneer, plywood, chipboard and sawwood and coniferous pulp.

29. The Symposium appreciated the organization of the ECA/FAO/BEAO Conference on Pulp and Paper Development in Africa and the Near East, held in Cairo, 8 - 18 March 1965, and endorsed the following final resolution of that Conference:

" The Conference notes that paper requirements in Africa and the Near East are likely to rise by three million tons by 1980, and that even this increase may fall short of meeting the region's basic needs for cultural and industrial papers;

" RECOGNIZES that this growing need cannot be satisfied through rising imports, and therefore, believes it necessary to speed up the rate at which new pulp and paper capacity is being established in the region;

" NOTES that (a) the region's fibrous raw material resources and non-wood, though unevenly distributed, are capable of sustaining most, if not all, of the required expansion;

(b) that many African countries are favourably endowed for the rapid creation of additional reserves of coniferous fibre at very low cost;

(c) that this fact, taken in conjunction with the deteriorating wood resources/requirements balance in some of the advanced regions of the world, offers the prospect of successfully establishing in Africa, not only the additional capacity needed to supply the region's expanding requirements, but also an important export-oriented pulp industry;

" RECOMMENDS that member governments of FAO and ECA in the region take the following steps to facilitate the required expansion and take advantage of developing export opportunities :

"1. The conduct of pre-investment surveys to determine the cost and economic availability of the fibre and other resources needed.

"2. The selection of promising sites for new mills, and the execution of feasibility studies for specific mill types and sites in the selected locations, and

"3. The formulation of short and long-term programmes for pulp and paper development, properly integrated with overall economic development plans, and especially those concerned with strengthening the infrastructure - communications, power, water supply, etc.;

" DRAWS the attention of national planning agencies of interested institutions such as the IBRD, IFC, IDA, African Development Bank, United Nations Special Fund and of countries carrying out bilateral assistance programmes in the region, to the urgency of, and special opportunities afforded by, investments in this sector;

" INVITES member governments in the region to review current forest policies in the light of the findings of this Conference, and in particular to consider the adequacy of present planting programmes and the need to concentrate new industrial plantations around favourable potential mill sites.

" CONSIDERS ALSO, given the presently small size of national markets in many countries of the region and the significant scale of economies in many branches of this industry, that national self-sufficiency in paper in all countries of the region will not represent an optimum use of the region's resources and could act as a retarding influence on healthy industrial development; and therefore

" RECOMMENDS that governments of the region should co-ordinate their plans for developing this industrial sector, and related structural development in particular intra-regional transport facilities;

" BELIEVES that FAO and ECA can play a useful role in channeling assistance to the region, in keeping trends and development projects under continuous review, and in providing facilities for consultation between governments on development plans;

" INVITES the Director-General of FAO and the Executive Secretary of ECA to strengthen and co-ordinate their programmes in the pulp and paper field so as to render more effective services to the governments of the region."

Building materials industry in Africa

30. Document E/CN.14/AS/III/1/5 on the building materials industry in Africa, prepared by the ECA secretariat, was reviewed. The major products embraced by this industry were described to be cement and the allied products, building materials and components of iron, steel and timber, flat glass, and sanitary and electrical fittings and fixtures in all materials. In addition, a wide range of other no less important materials such as clay products, building materials of non-ferrous metals, plastics, paints and varnishes are covered.

31. Delegates outlined developments in their respective countries in the field of the building materials industry. The importance of the industry to the economic and social growth of the region was underlined. It was noted that future requirements of building materials are of such an order of magnitude that unless immediate action is taken to expand the industry, economic development would be seriously impaired.

32. It was generally agreed that the role of the building materials industry must be clearly defined when drawing up national industrialization programmes, as failure to do so could retard the process of economic development. The experience of other countries could be sought in planning the development of the industry with a view to ensuring the efficiency of new industries. Attention was drawn to the vital need of developing building materials based on local resources as well as evolving new materials based on waste and industrial by-products. It was stressed that African countries would have to explore all sources of building materials in order to be able to cope with housing needs and construction activities that would increase with industrialization. At the same time, efforts must be directed to reducing building costs. An important means of achieving this aim would be for African countries to promote actively the setting up of building research and standardization institutions, in which studies would be made on the adaptation of housing and construction projects to specific African conditions, and on the possibility of organizing production units to mass production methods. In this connection the need to co-ordinate the activities of building research institutes with industrial research organizations was stressed.

33. The areas of co-operation among countries in the development of the industry were closely examined. It was agreed that building materials which are bulky and voluminous should preferably be developed at the national level. It was also recognized that such building materials as stones, sand, bricks, concrete products, etc., constituted national industries because of the fact that they are market-oriented industries. On the other hand, it was agreed that multi-national and sub-regional

co-operation was necessary in order to establish economic-sized production units and develop key building materials. In this context, the consensus was that the production of materials such as iron and steel products, sheet glass, sanitary and electrical fittings and fixtures would require the co-operation of African countries either at the multi-national or sub-regional level. The scope for co-operation through specialization of products was pointed out, and the advantages of co-operation in frontier areas were stressed in order to establish more organic and efficient industries.

34. It was recommended that:

- (a) to cope with the requirements of the economic and social developments, top priorities should be given to the building materials production in the current and future national economic development plans in the African countries;
- (b) emphasis should be directed to the development of traditional and new building materials based on local resources, such as building stones, clays, lime, sand, gypsum, bamboo and timber, as well as agricultural and industrial waste products;
- (c) building standards should be patterned at the regional and sub-regional levels to suit African conditions in order to ensure reduction of construction costs;
- (d) an African Building Materials Industry Development Research Centre should be established to work in co-operation with national and sub-regional building research organisations, existing or planned, in order to facilitate exchange of information and experiences among African countries.

Textiles

35. The ECA report (Document E/CN.14/AS/IFI/24) was reviewed. Developments in various countries were outlined. It was agreed that the industry was important to the world in general and to Africa in particular. It was noted that the establishment of a textile industry was fairly easy to achieve, but the cost of studies and machinery could be high. It was emphasized that vocational training must go hand in hand with industrial development in the sector.

36. The following recommendations were made:

- (a) that textile mills in African countries should be established in relation to existing and potential markets as well as conditions of profitability;
- (b) that factories for the manufacture of ready-made clothing should be established to provide a source of employment and also to serve as a market for textile mills;
- (c) that machinery should be used to full capacity;
- (d) that production standards should be evolved to ensure good quality;
- (e) that industrial research centres should be created to enable ^{the} African textile industry to reap maximum benefit from technical advances;
- (f) that technicians of high calibre should be trained in adequate numbers;
- (g) that regional or sub-regional co-operation for raw materials production (e.g., viscose and artificial silk) should be encouraged;
- (h) that ECA should continue with studies, in co-operation with UN specialized agencies and the countries concerned, on machine

capacity, type and quality of current production, raw material availabilities, etc.

Agricultural industries

37. A number of documents submitted by FAO on various aspects of agricultural industries were reviewed (E/CN.14/AS/III/1/7, E/CN.14/As/III/17, E/CN.14/AS/III/18, E/CN.14/AS/III/19, E/CN.14/AS/III/21, E/CN.14/AS/IV/3).

38. These studies indicated that in most African countries industries processing agricultural, fishery and forest products constituted a major part of their total industry at the present time. These products were often the most readily available raw material for industrialization. Many of them had to be processed before they could be utilized, while processing was also essential for the preservation of perishable products. As incomes and living levels were raised, consumers might be expected to demand an increasing proportion of processed food. The establishment of certain primary processing industries could lead, through forward linkage, to a number of secondary and tertiary industries; they also made possible numerous industries using by-products or waste products.

39. Stress was laid on the close interdependence of agriculture and industry and the need to plan for a parallel development of these two sectors of the economy. If marketed production of food failed to keep pace with the demand of the expanding industrial labour force, the industrialization programme itself could be jeopardised, either by the pressure of rising food prices on industrial wages, or by the need to divert to food imports scarce foreign exchange resources required for the import of capital goods. Greater attention was therefore needed to the role of industry in contributing to the expansion of food production, by supplying the agricultural population

both with requisites such as fertilizers, pesticides, selected seeds and implements and with the consumer goods that played an important part in their incentive to increase production for the market. African countries should co-operate in the development of implements and processing equipment better suited to their needs than those at present imported from developed countries.

40. The increasing tendency for FAO to be directly involved in development operations was welcomed, as compared to its earlier largely advisory and training functions. This had come about particularly since the establishment of the United Nations Special Fund and the inception of the FAO/IBRD Co-operative Program. Under the latter programme, the two organizations participated jointly in the identification and elaboration of agricultural, fishery and forestry projects for IBRD financing.

41. It was noted that FAO's assistance was not confined to the production of the raw material but also covered its processing. A number of African countries had already received assistance through the Special Fund, the Freedom from Hunger Campaign and through FAO/UNICEF assisted projects in pre-investment surveys, feasibility studies and the establishment of pilot plants designed to lead to full-scale industrial projects in such fields as the processing of a wide range of food crops, dairy industries, the construction of abattoirs, fishery industries, leather manufacture, pulp and paper, wood-working and saw-milling.

42. It was recognized that industries processing agricultural, fishery and forest products covered a very wide range, and that some of the simpler processes scarcely fell within the definition of industry. Especially now that smaller-scale processing equipment, better suited to the needs of African

countries, was increasingly becoming available, the development of many agricultural processing industries could economically be based on domestic markets, and there was less scope for regional and sub-regional co-operation than in the case of some other branches of industry. In this connection, it was noted that the Indicative World Plan for Agricultural Development, now in preparation by FAO, was being built up on a sub-regional basis and would provide a better basis for the assessment of the possibilities for co-ordination and co-operation between countries.

43. Among more specific points noted, reference was made to the need to reduce the cost of cans and other containers and packaging materials; to the need for promotional campaigns to popularise such unfamiliar processed products as fish flour; and to the need for further research on the processing of African food products and raw materials, including by-products, that were so far little used.

44. The need for more information on the extent of African fishery resources was recognized. Attention was called to technical and economic difficulties encountered in preserving and transporting fish and to problems of marketing canned sardines in Europe.

45. It was suggested that African countries should give preferential treatment to imports of agricultural raw materials from within the continent of Africa.

46. It was also noted that the establishment of grades and standards on a unified African basis could assist in the expansion of trade both among African countries and in world markets, especially for processed agricultural products.

47. Appreciation was expressed for the work done by FAO in assisting African countries in the development of agro-allied industries. It was

recommended that in its future work in this regard FAO should:

- (a) intensify its assistance to governments in the promotion of industries related to agriculture, fisheries and forestry;
- (b) pay increased attention, particularly in the work of the FAO/ECA Joint Agriculture Division, to the identification of areas for co-operation among African countries, including the promotion of intra-regional trade in processed products;
- (c) provide further assistance in obtaining information on the extent of African fishery resources, including, for example, the tuna resources off the east coast and the resources of the Red Sea.

48. The hope was expressed that an arrangement similar to the FAO/IBRD Co-operative Program could be made between FAO and the African Development Bank.

Small-scale industries

49. The secretariat document (E/CN.11/AS/III/25) on the development of small-scale industries in Africa was reviewed.

50. It was suggested that the question of the definition of the term small industry be considered by a committee that might be appointed for the purpose by ECA.

51. Delegates of several countries explained the steps being taken in regard to development of small industries in their territories. These included loans, establishment of industrial estates, service institutes, etc.

52. The importance of small-scale industries in national economies was fully recognized as well as the need for their rapid development. It was realized that small industries generated employment, added to the production of a

number of consumer products, and involved comparatively small capital expenditure. In Africa, which was faced with shortage of capital, this was particularly important. Because of the use, normally of comparatively simple techniques, they offered themselves as good instruments for African entrepreneurs. It was noted that small-scale industries made a useful contribution towards decentralization of urban areas and offered employment opportunities to traders displaced by rationalization of trade.

53. Often they catered for the requirements of local areas in respect of various products and thereby saved transport charges that would otherwise be involved.

54. It was noted that some countries in Africa are planning the establishment of small industries as adjuncts to schools. This was considered useful as these industries would facilitate the training of students in the field of industry concurrently with their formal education.

55. The representative of the ILO explained the assistance extended by his organization to develop small industries in Africa.

Second-hand machinery

56. The question whether or not to encourage import of second-hand machinery from developed countries was discussed at length. A United Nations expert (Centre for Industrial Development) stated that the conclusions arrived at in a study made by the Centre were that in the case of certain types of machines, use of second-hand machinery could be recommended.

57. It was, however, felt that it would not be advisable to encourage in Africa the use of second-hand machines, but in view of the conclusions in the UN report referred to, it was suggested that ECA might examine the

question further.

58. The Committee II adopted two resolutions which are attached.

RESOLUTION

PHARMACEUTICAL INDUSTRIES

Noting that pharmaceutical products form one of the largest import items into African countries, that importation of these products is increasing at a high rate and that present per caput consumption is relatively low ;

Recognizing that most requirements for the manufacture of these products are now available from many sources and that local manufacture in Africa is possible at favourable costs of production and would save foreign exchange ;

Noting that the World Symposium on Industrialization will be held in Geneva in 1967 ;

Recommends :

- 1) that the pharmaceutical industry in Africa be given the priority it deserves in development programmes, with due consideration to quality control ;
- 2) that the OAU should establish a committee of experts to study the present and expected state of this industry in African countries and ways of obtaining help and of exchanging experience in this field ;
- 3) that the ECA should prepare in association with WHO, a comprehensive report to be presented to the Geneva conference in 1967 on :
 - (a) possible ways and means by which the pharmaceutical industry in Africa can be developed and its quality properly controlled to an extent capable of meeting the rapidly growing needs of the continent with the utmost saving in time and money ;

- (b) the help that Africa may and should get for this purpose including access to safe and reliable sources of technology, methods of quality control and other procedures necessary to the development of a pharmaceutical industry.

Small-scale Industries Development

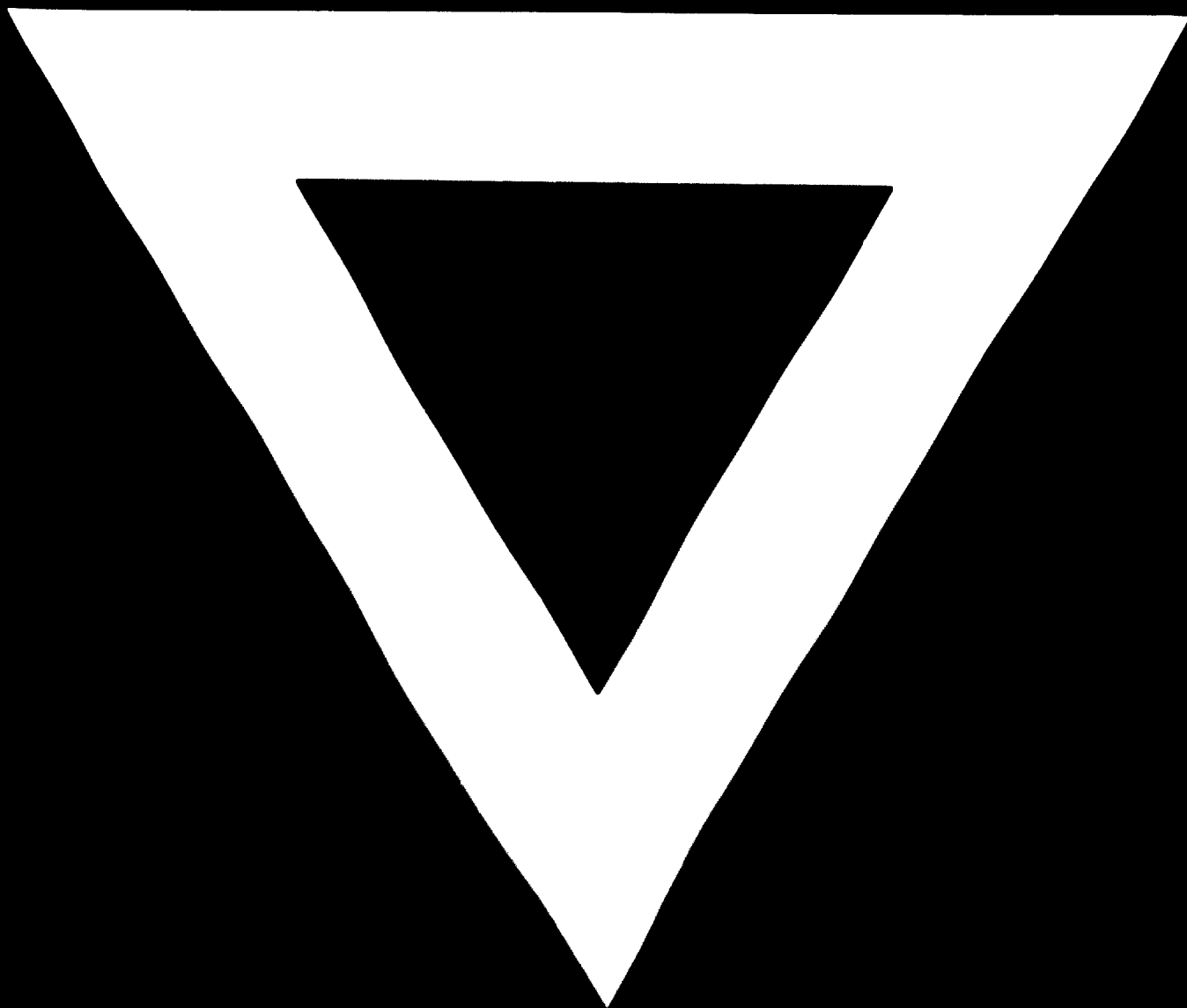
The Symposium on Industrial Development in Africa :

Noting that small-scale industries offer one solution, among others, to the twin problems of unemployment and shortage of capital in Africa,

Noting that such industries could mostly be initiated and developed by African entrepreneurs,

Recognizing that the products of small-scale industries could form sizeable substitutes for imports,

1. Recommends that each member State establish state-sponsored institutions to help small-scale industrialists to secure technical assistance for production, management and marketing;
2. Requests ECA, in co-operation with the Organization for Industrial Development and other UN agencies to assist in the preparation of programmes for small-scale industry development and the establishment of national or multi-national institutions for promoting small-scale industries.



29.3.74