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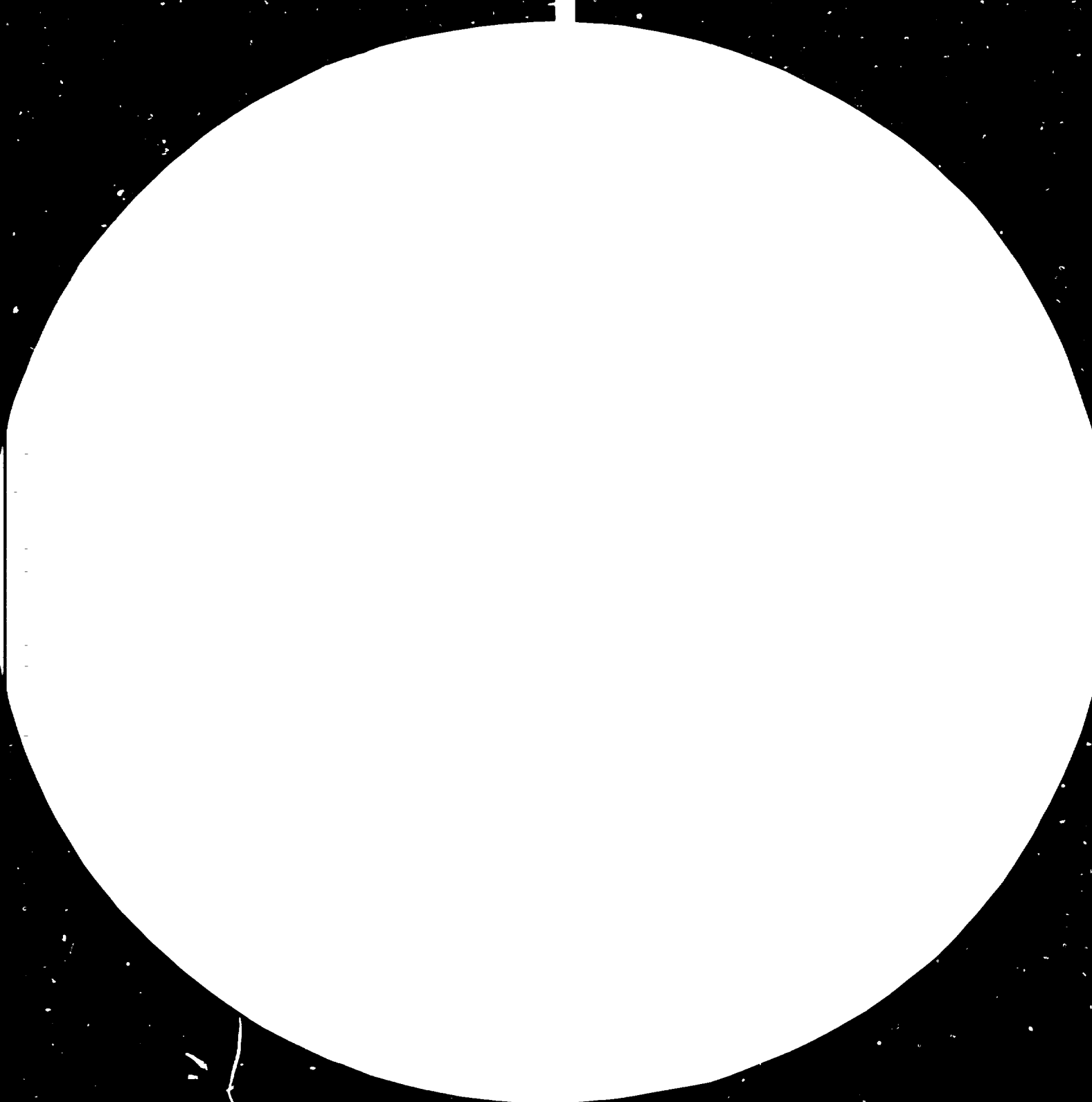
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UNITED NATIONS INDUSTRIAL DEVELOPMENT ORGANIZATION

**FIRST
CONSULTATION
ON THE
FOOD-PROCESSING
INDUSTRY**

The Hague, Netherlands, 9-13 November 1981

REPORT

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PREFACE

The Second General Conference of the United Nations Industrial Development Organization (UNIDO), held at Lima in March 1975, recommended in paragraph 66 of the Lima Declaration and Plan of Action on Industrial Co-operation and Development^{1/} that UNIDO should include among its activities a system of continuing consultations between developed and developing countries with the object of raising the developing countries' share in world industrial output through increased international co-operation.

The General Assembly, at its seventh special session in September 1975, decided that the System of Consultations called for by the Lima Declaration and Plan of Action should be established at the global, regional, interregional and sectoral levels (General Assembly resolution 3362 (S-VII), part IV, para. 3), and that UNIDO, at the request of the countries concerned, should provide a forum for the negotiation of agreements in the field of industry between developed and developing countries and among the developing countries themselves.

The System of Consultations was thus established under the guidance of the Industrial Development Board.

At its fourteenth session, held in 1980, the Board decided to establish the System of Consultations on a permanent basis, with the following main characteristics, including those described in earlier decisions:

(a) The System of Consultations should be an instrument through which UNIDO would serve as a forum for developed and developing countries in their contacts and consultations directed towards the industrialization of developing countries;^{2/}

(b) Consultations would also permit negotiations among interested parties at their request, at the same time as or after the consultations;^{3/}

^{1/} See Report of the Second General Conference of the United Nations Industrial Development Organization (ID/CONF.3/31), chap. IV.

^{2/} Official Records of the General Assembly, Thirty-fifth Session, Supplement No. 16 (A/35/16), vol. II, para. 151(a).

^{3/} Ibid., para. 151(b).

(c) Participants from each member country should include officials of Governments, as well as representatives of industry, labour, consumer groups and others, as deemed appropriate by each Government;^{4/}

(d) Final reports of the Consultations should include such conclusions and recommendations as were agreed upon by consensus by the participants, as well as other significant views expressed during the discussion.^{5/}

In accordance with a decision of the Board at its twelfth session, in 1978, authorizing UNIDO to proceed with preparations to convene the First Consultation Meeting on the Food-Processing Industry,^{6/} a global preparatory meeting was held at Vienna from 8 to 12 January 1979, at which four broad issues were identified for consideration by the Consultation, namely:

Integrated development of all sectors in the food production, processing and marketing chain;

Fulfilment of the technology requirements of developing countries;

Expansion of technical and economic co-operation between developed and developing countries and among the developing countries themselves;

Improvement of marketing and distribution (see ID/WG.295/1, chap. III).

These issues were further elaborated at the Expert Group Meeting on the Role of Co-operatives in the Development of Food-Processing Industries in Developing Countries, held at Vienna from 22 to 24 April 1981.^{7/}

Following the final preparatory activities, it was decided to convene the First Consultation on the Food-Processing Industry at The Hague from 9 to 13 November 1981. It was agreed that the issues would be formulated as follows:

4/ Ibid., para. 152.

5/ Ibid., Thirty-second Session, Supplement No. 16 (A/32/16), para. 163.

6/ Ibid., Thirty-first Session, Supplement No. 16 (A/31/16).

7/ For the report of the Expert Group Meeting, see UNIDO/PC.8.

Strengthening food-processing industries through the integrated development of all sectors of the food production, processing and marketing chain;

Expansion of technical and economic co-operation for strengthening the food-processing sector in developing countries, including access to markets.

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INTRODUCTION

1. The First Consultation on the Food-Processing Industry was held at The Hague from 9 to 13 November 1981. It was attended by 188 participants representing Governments, industry and labour from 67 countries, 8 organizations of the United Nations system and 16 other international organizations. For a list of participants, see annex I below.

AGREED CONCLUSIONS AND RECOMMENDATIONS

2. The agreed conclusions and recommendations of the Consultation are set out in paragraphs 3, 4 and 5 below.

Issue No.1: Strengthening of food-processing industries through the integrated development of all sectors of the food production, processing and marketing chain

3. The Consultation agreed on the following conclusions and recommendations on issue No.1:

(1) The concept of the integrated approach to the food-processing industry is of major importance as regards self-sufficiency in food. Since this concept, which is directly associated with the food system and incorporates economic, technological and organizational policies, is a complex one, it is recommended that:

- (a) UNIDO should organize appropriate follow-up action to the Consultation, including the use of the Industrial and Technological Information Bank, with a view to enabling countries to exchange information on their experiences in the area and to discuss guide-lines for policies in this field;
- (b) UNIDO should consider the possibility of providing a long-term view of global trends in the food-processing industry and of policies to be followed in the light of these trends, in order to explore the necessity of reorienting that industry towards integration in developing countries through, inter alia, the initiation of an exchange of national plans in this sector.

(2) Considering the importance and potential of this sector, developing countries need assistance in their negotiations with foreign partners, with regard to the legal régime to which transfer of technology and foreign investment would be subject.

It is recommended that:

UNIDO, in collaboration with relevant United Nations bodies, should prepare for consideration by the Second Consultation Meeting on the Food-Processing Industry a check-list of specific elements suggested for inclusion in agreements permitting efficient co-operation between the partners, based on mutual benefit, and including training as an important element.

(3) Considering the need for developing countries to increase the value-added of their raw material exports and reduce their imports, it is recommended that:

UNIDO, in collaboration with the relevant United Nations agencies, should study and promote ways and means for developing countries to increase the degree of processing of food commodities now being exported unprocessed or at very low levels of processing.

(4) It is recognized that it would be useful to extend the range of partners from developed countries, as well as from the more industrialized of the developing countries, which could co-operate in all activities related to food processing. Additional partners include small and medium-scale enterprises from developed and developing countries and co-operatives and trade unions from both developed and developing countries. It is recommended that:

UNIDO should take appropriate action, including consideration of the convening of a follow-up meeting to identify and assess the capabilities of those partners and to analyse and formulate ways and means of identifying and assisting those partners, taking into account financial and other constraints and the transfer of entrepreneurial skills.

(5) In view of the importance of research and development and assistance and training services in the food-processing industry in developing countries, and considering the lack of infrastructure in this area in those countries, it is recommended that:

UNIDO should contribute to the establishment of special programmes to strengthen existing national and regional centres and, where appropriate, to establish new ones; it is also recommended that training should be given in the recipient countries.

Issue No.2: Expansion of technical and economic co-operation for strengthening the food-processing sector in developing countries, including access to markets

4. The Consultation agreed on the following conclusions and recommendations on issue No.2:

Conclusions

(1) There is broad agreement on the importance of the food-processing industry in both developed and developing countries, particularly for the satisfaction of the basic needs of the population and the strengthening of their food security, and on the need to strengthen international co-operation in this field. The present magnitude of international co-operation needs to be augmented and improved through new forms of co-operation, involving new partners such as small and medium-scale enterprises and co-operatives.

(2) The new forms of co-operation would enhance the integrated development proposed in the food-processing industry. This would allow for co-ordinated development of the various stages of the agro-food chain, through upstream integration which would increase the participation of the producing developing countries, permit a more equitable distribution of the benefits among the actors in the agro-food chain, and foster the linking of the food-processing industry to the other sectors of the economy while being consistent with the national socio-economic objectives.

(3) There is also broad agreement on the importance of the following elements for the development of the food-processing industry in the developing countries:

(a) Training:

- (i) Information on training sources;
- (ii) Content and adaptation of training programmes;
- (iii) Improved access to existing training facilities;
- (iv) Strengthening of national and regional training facilities;

(b) Technology:

- (i) Information and access to suitable technologies and related know-how;
- (ii) Terms and conditions for the acquisition of technology, with particular emphasis on pricing;
- (iii) Adaptation to local conditions;
- (iv) Promotion of research and development activities in developing countries;
- (v) Development of national consulting and engineering services;

(c) Financing:

- (i) Programme of financing;
- (ii) Terms and conditions of financing;
- (iii) Modes of loan repayment;

(d) Trade and marketing arrangements:

- (i) Terms and conditions;
- (ii) The development of appropriate marketing strategies;
- (iii) Relaxation of tariff and non-tariff barriers and elimination of discriminatory treatment of imports from different sources.

(4) Given the above interlinked aspects of establishing and developing the food-processing industry, new forms of international co-operation should be explored through the development of a frame of reference in this sector. Such a frame of reference would provide policy guidelines for a comprehensive approach to the acquisition of training, technology, financing, marketing etc.

(5) It is considered that co-operation between developing countries, and particularly at the regional and subregional levels, could play an important role in the development of this sector in countries with limited marketing, financial and raw material potential.

Recommendations

The Consultation recommends that UNIDO should:

- (a) Identify the various partners, especially new partners, available for international co-operation and analyse the role which each of them could play in promoting the food-processing industries in developing countries, establish a roster and assist in the creation of contacts between clients in developing countries and appropriate partners;
- (b) In collaboration with other international organizations and institutions, examine food-processing industries in selected developing countries and explore the prospects of this sector in order to identify production, technological and economic problems and to elaborate recommendations concerning ways and means of overcoming them;
- (c) In collaboration with other organizations and institutions, assist in the strengthening of the national and regional training facilities in developing countries, in improving the access to the existing training facilities and in exploring the possibilities of better adaptation of their training programmes to the requirements of the developing countries;

- (d) In collaboration with the parties concerned, strengthen the Industrial and Technological Information Bank (INTIB) by collecting and diffusing information specific to the integrated development of the food-processing industry, including information on suitable technologies and related know-how; assist the developing countries in setting up national and regional technological information units;
- (e) In view of the forthcoming Second Consultation on the Food-Processing Industry and the First Consultation on Industrial Financing, which will take place in 1982, UNIDO, in co-operation with the international organizations concerned, will undertake studies on the financing of the establishment and operation of food-processing industries in the developing countries as well as on methods of loan reimbursement and the possibility of improving these methods;
- (f) Jointly with the Food and Agriculture Organization of the United Nations, the United Nations Conference on Trade and Development, the International Trade Centre, the United Nations Centre on Transnational Corporations and other appropriate organizations, develop a frame of reference for international co-operation in this sector;
- (g) Request the relevant international agencies, including the United Nations Conference on Trade and Development, the General Agreement on Tariffs and Trade and the International Trade Centre, to explore appropriate modalities for the promotion of international trade and marketing arrangements for processed food products, including terms and conditions, development of appropriate marketing strategies, relaxation of tariff and non-tariff barriers and elimination of discriminatory practices directed against imports from developing countries;

- (h) Study and recommend ways and means of expanding technical and economic co-operation among developing countries in the food-processing industry, taking into account the Caracas Programme of Action on Economic Co-operation among Developing Countries adopted by the High-Level Conference on Economic Co-operation among Developing Countries held in Venezuela in May 1981; particular attention should be paid to the design of food-industry strategies, planning systems and the development of human resources;
- (i) Analyse the current practices of financing project studies for integrated investment projects in the food-processing sector of developing countries, to identify new methods for special support to project appraisal;
- (j) In collaboration with the United Nations Conference on Trade and Development and governmental agencies, carry out branch studies directed at identifying possibilities of establishing multinational processing or commercial firms between developing countries with the direct participation of Governments.

Convening of a second global consultation on the food-processing industry

Conclusions of the plenary session

5. Considering the strategic importance of the food-processing industry and of the role of the international community, the Consultation agrees that the dialogue initiated by UNIDO should be pursued by convening preparatory regional and subregional meetings of the food-processing industry, treating the specific needs of the regions concerned and leading to a second global consultation to be held in Africa before 1985. On this occasion, UNIDO will report on the implementation of the recommendations made at the First Consultation.

I. ORGANIZATION OF THE CONSULTATION

Opening of the Consultation

6. The First Consultation on the Food-Processing Industry was opened by Mr. C. P. van Dijk, Minister for Development Co-operation of the Netherlands.

7. An introductory statement was made by Dr. Abd-El Rahman Khane, Executive Director of UNIDO.

Election of officers

8. Mr. Wilhelm Lammer: (Netherlands), Chairman of the Federation of Organizations of the Food and Drink Industries, was elected Chairman.

9. Four Vice-Chairmen were elected, as follows:

Mr. R. Echeverria Zuno (Mexico), Coordinador General, Coordinación General de Desarrollo Agroindustrial

Mr. Laurence M. Ndeeri (Kenya), Commercial Secretary, Embassy of Kenya, Brussels

Mr. A. A. Siddiqui (Bangladesh), Factory Manager, Nabisco Biscuit and Bread Factory

Mr. I. Varga (Hungary), Deputy Director, Ministry of Foreign Trade and Komplex Company

Adoption of the agenda

10. The Consultation adopted the following agenda:

1. Opening of the Consultation
2. Election of the Chairman and Vice-Chairmen
3. Adoption of the agenda
4. Discussion of the issues:
 - (a) Issue No. 1: Strengthening food-processing industries through the integrated development of all sectors of the food production, processing and marketing chain;
 - (b) Issue No. 2: Expansion of technical and economic co-operation for strengthening the food-processing sector in developing countries, including access to markets
5. Other issues proposed for consideration by the next Consultation
6. Adoption of the report of the Consultation

Establishment of working groups

11. The Consultation established two open-ended working groups to discuss the issues under agenda item 4 and to propose conclusions and recommendations for consideration by the plenary Consultation.

12. Mr. N. W. Tape (Canada), Director of the Food and Nutrition Service in the Canadian Department of Agriculture, was elected Chairman of Working Group I, which would discuss issue No. 1 on the strengthening of food-processing industries through the integrated development of all sectors of the food production, processing and marketing chain.

13. Mr. M. H. Tantawi (Egypt), President of the Société des sucreries et distilleries d'Égypte, as elected Chairman of Working Group II, which would discuss issue No. 2 on the expansion of technical and economic co-operation for strengthening the food-processing sector in developing countries, including access to markets.

Documentation

14. The documents issued for the Consultation are listed in annex II below.

Adoption of the report

15. The report, including the reports of the working groups, was adopted by consensus on Friday, 13 November 1981, at the closing session.

Expression of thanks to the host Government

16. Participants expressed their appreciation to the Government of the Netherlands for having acted as host to the Consultation.

II. REPORT OF THE PLENARY SESSIONS

Introduction by the UNIDO secretariat

17. In introducing the issues to be discussed, the UNIDO secretariat stressed that the food-processing industry, with an estimated value added of some \$US 230 billion and a labour force of 26 million or so, represented one of the world's leading industrial activities. For most developing countries, it was the largest single industrial sector, accounting for almost one quarter of manufacturing output and one sixth of all industrial employment and value added. Because the food-processing industry was a vast and complex one, it was felt necessary to concentrate on two important issues, which were common to practically all branches of food industry.

18. With regard to issue No. 1, it was stated that integration of the food-processing industry could be broadly defined as the co-ordinated development of the various stages of the agro-food chain in consideration of market requirements and agricultural or fishery production. It was pointed out that the real issue for developing countries was not so much one of integration, since integration of agro-industries was taking place throughout the world, but rather how to integrate by making the most of the resources available domestically and using foreign collaboration to full advantage whenever it was needed, it being understood that the degree of industrial collaboration required for the development of food industry could vary from subsector to subsector.

19. It was stated that special attention should be paid to the formulation of comprehensive national development strategies for the development of the food-processing industry through a multidisciplinary approach. In that connection, the importance was stressed of strengthening upstream links between industry and agriculture and downstream links covering distribution and marketing. Various ways were suggested in which such links could be established.

20. With regard to issue No. 2, it was noted that, so far, the major form of international co-operation in food industry development had been undertaken by the transnational corporations. Given the new dimensions of the problem, and particularly in view of the national strategies of the developing countries in respect of food production, it was felt that

new forms of international co-operation called for additional partners to be involved in the integrated development of the food-processing industry. Within international commodity agreements, the increased industrial processing of agricultural raw materials by developing countries needed to be emphasized. The possibilities for the establishment of target ratios relating to the export of raw materials and processed-food products for selected agricultural commodities could be explored.

21. The secretariat drew attention to the fact that a number of developing countries had already built up a large capacity in the food-processing industry, and that there were many possibilities for co-operation between developing countries in that important and dynamic field.

22. It was considered that the long lead time required to establish the multifaceted agro-industrial infrastructures pointed to the fact that long-term industrial collaboration arrangements would condition the most rapid promotion of the food-processing industry in developing countries.

Summary of discussions

23. Participants commended the secretariat on the preparation of the first global study on the food-processing industry (ID/WG.345/3/Rev.1), and the presentation of the issues; a few participants noted, however, that some of the statistical data contained in the study might be ambiguous. One participant felt that the different repercussions on employment of recent trends in the development of the food-processing industry had not been sufficiently recognized and that the role of workers was not adequately reflected in the background documents.

24. Many participants noted the importance of the sector, but felt that insufficient attention had been paid at the national level to the development of agro-industry. Participants stressed the importance of adopting an integrated approach to the development of the agro-food chain, from the production of agricultural raw materials to the processing, distribution and marketing of final products. Several participants drew attention to the critical elements of the chain, in particular technology, management and marketing. One participant stressed the need to develop a framework for the development of the industry through the formulation of policies relating to the use of resources, and to technology, financing, investment, marketing and infrastructure. It was noted that there were several possible approaches to

the organization of the food-processing chain involving different combinations of plant size, technology, incentive systems etc.

25. Several participants emphasized the importance of analysing the development of agro-industry on the basis of the past and present international economic relationships that had conditioned the patterns and structure of world production and consumption. Participants addressed themselves to the question of location of industrial processing; while some stressed the need to locate it close to the source of raw materials, others pointed out the technical and economic imperatives of locating it close to the markets.

26. A few participants considered the problems of obtaining access to the markets of developed countries for their processed products, due notably to the existence of tariff and non-tariff barriers. Other participants pointed out that, over the past few years, a degree of trade liberalization had taken place; they further stressed that market restrictions did not constitute a major obstacle to the development of export-oriented agro-industry in the developing countries, but that the problem lay rather in its organization and management.

27. Several participants felt that, from an economic point of view, priority should be given to the processing of food for the domestic market over processing for export. One participant, while noting that self-sufficiency was an attractive goal, questioned the extent to which it should be pursued and at what cost.

28. Participants considered the role of the various partners in international co-operation in the food-processing industry. A few participants noted the role of transnational corporations, particularly in the location of processing, and in the marketing and trade of agricultural commodities. One participant noted, however, that the relocation of productive capacities by the transnational corporations had caused unemployment in the developed countries. Another participant focused attention on the need to establish mutually acceptable parameters of co-operation and to achieve a transparency of price mechanisms.

29. Many participants drew attention to the fact that small and medium-scale enterprises and co-operatives had an important place in the existing industrial structure of developed countries; they had the capacity to become increasingly effective partners in international co-operation, since they were in a position to provide various elements in the agro-food chain: technology, training, organization, management, and to some extent, marketing and distribution.

30. Several participants pointed out that some developing countries had already acquired considerable experience and productive capabilities in specific branches of the industry; on that basis, they were in a position to offer technology and know-how to other developing countries in support of the development of their food-processing industries.

31. Many participants stressed the need to secure appropriate financial resources for the development of the agro-food industry, and to enable both co-operatives and small and medium-scale enterprises to function as effective partners in international co-operation. One participant stressed the fact that development banks did not currently finance studies and investigations in the preliminary phase of industrial co-operation arrangements; he added that the service sectors, such as transport and storage, were only rarely financed by the development banking system.

32. One participant considered that it was important for developing countries to formulate development strategies and to define their needs and requirements in international co-operation in order that the developed country partners might make the most effective response. He stated that small and medium-scale enterprises and food processing co-operatives in his country were prepared to discuss with interested parties, and to formulate mutually acceptable forms of co-operation.

III. REPORT OF WORKING GROUP I
ON THE STRENGTHENING OF THE FOOD-PROCESSING INDUSTRIES
THROUGH THE INTEGRATED DEVELOPMENT OF ALL SECTORS
OF THE FOOD PRODUCTION, PROCESSING AND MARKETING CHAIN

Summary of discussions

33. There was general agreement that the food-processing industry was a key industry, which should receive high priority both at the national and international levels. The lack of information available on the nature and potential of the industry was stressed. More specifically, developing countries had to enlarge their capacities to select and assess such information.
34. It was recognized that the planning and co-ordination of food system development deserved to be given high priority by Governments and that such high priority should be reflected in the organizational structures and decision-making arrangements of Governments.
35. Many participants felt that the planning, evaluation, implementation, and co-ordination at the national level of all phases of the integrated food-processing chain were essential and that among the many factors which needed to be considered along that chain were such matters as the extent and quality of land, land tenure, water resource management, crop-production practices, appropriate varieties of plant and animal types, fisheries resources, technology and technology transfer, including the negotiation of technology agreements and training at all levels and in particular at the intermediate or technician level. Also of relevance were appropriate energy and education policies. It was noted, however, that for a number of developing countries an integrated food system approach to the food-processing industry might not be appropriate. It was also noted that the integrated approach would need to be adjusted to the conditions prevailing in specific developing countries.
36. Participants agreed that the involvement of co-operatives, the private sector and Governments would be valuable in the development of the industry. There was also agreement on the necessity for investment, finance, and farm credit and also, given the seasonal nature of crop production and other

integrated operations, on the need to provide short-term working capital. Among the other important elements were quality control at various points in the food-processing chain, and the need for appropriate pricing policies as incentives. It was recognized, however, that the food-processing industry was often subject to a price squeeze between food raw material prices, which were kept high, and consumer prices, which were kept low.

37. Many participants agreed that UNIDO had a specific role to play in the provision of information, advice and assistance in the provision of training, including technical assistance in the operations of training centres and the training of technician instructors. Additionally, some participants proposed that guide-lines on agreements involving foreign investment and the transfer of technology should form an important part of the work of UNIDO. The work done by the United Nations Centre on Transnational Corporations and the United Nations Conference on Trade and Development on guide-lines for agreements involving foreign investment and the transfer of technology should form an important part of the assistance given by UNIDO. Some participants emphasized that the duplication of the work of those United Nations bodies should be avoided.

38. It was noted by some participants that both multilateral and bilateral aid programmes provided support for the food-processing sector and for its infrastructure and the need to improve the efficiency of existing channels and arrangements for technical assistance was emphasized. Other participants noted, however, that within the food-processing chain the prices paid to producers were often unilaterally determined by the owners of processing plants and the need was stressed for a fair distribution of the benefits accruing to the various parties involved, internally or externally, in the food-processing chain. A few participants noted that co-operative action by suppliers of food raw materials, as well as by consumers of imported processed foods, was desirable.

39. Many participants recognized that a regional or subregional approach to the provision of various inputs into the food-processing chain, for example the production of fertilizers in a central plant, was particularly appropriate.

40. While some participants stressed that the industry should act to meet domestic requirements for processed food, other participants noted that the parallel development of food self-sufficiency and the increased processing of food raw material for export markets were desirable.

41. Several participants drew attention to the need to prepare reliable feasibility studies containing analyses of technical arrangements, equipment, marketing and distribution data, together with appropriate financial analyses. Many other participants recognized that developing countries should build up the capability to carry out such studies.

42. Some participants drew attention to the difficulties involved in breaking into export markets for processed foods, while other participants indicated the importance of developing that sector of their food-processing industry, since it could form an important source of national income. Additionally some participants noted that various markets for the inputs to and outputs from the food-processing industry were very imperfect, the developing countries having to face inflated costs for equipment and other inputs, as well as tariff and non-tariff barriers to the sale of processed food products. In that connection, some participants focused on the desirability of collaboration arrangements that would give mutual advantages to all producers in the food-processing industry through an exchange of processed products for know-how and capital equipment.

43. A number of participants drew attention to the special problems of the land-locked and least developed countries, particularly the countries with adverse climatic conditions, such as those prevailing in sub-Saharan Africa.

44. The need to provide a long-term global view of the evolution of the food-processing industry was pointed out and there was a call from some participants for UNIDO to initiate an exchange of development plans in that sector.

45. The view was expressed by several participants that co-operatives had a special role to play in collaboration with the Governments of the developing countries, and that their contribution would provide an alternative to the resources offered by the transnational corporations. Some participants drew attention to the fact that, whereas small producers in the developed countries often had the necessary experience and know-how, their lack of risk capital, for example, could make it difficult for them to embark on international collaboration.

46. Some participants emphasized that developing countries needed a suitable legal and policy framework to attract and regulate direct foreign investment, including investment by transnational corporations; it was noted, however, that developing countries needed assistance in their direct negotiations with transnational corporations. Many participants stressed the great difficulty developing countries had in dealing with transnational corporations, and the consequences arising from mistakes in that area, while a few participants emphasized the need for greater equality in the distribution of benefits in the integrated food-processing chain, drawing attention to the possibility that small producers might be exploited. Many participants indicated that there were major problems with regard to the suitability of technology and plants supplied from abroad; indeed, a few participants pointed out that machines and technology embodied particular types of political, social, economic and cultural relationships, which reflected the conditions prevailing in the countries where those machines were produced.

47. There was wide recognition of the possibility of setting up training programmes, research and development institutions and extension services on a regional and subregional basis; a few participants, however, drew attention to political differences, which in the past had adversely affected the success of such arrangements.

48. Many participants recognized that legal arrangements suitable for new partners in the industry needed to be appraised and, if necessary, designed. The means of identifying such new partners also needed to be found.

49. Several participants noted the convergence of views in the Consultation on the importance of an integrated approach, the various elements constituting the food-processing chain, the necessary support activities and the need for national planning of the sector. It was stated by many participants that UNIDO should assist developing countries through the establishment of guide-lines, model contracts and framework agreements, particularly for the negotiation of transfer of technology.

50. One participant put forward the idea of a food-processing equipment exhibition to be sponsored by an international organization and partly financed through fees charged to the exhibitors. Another participant stressed the relationship between food and energy as a very important area, which should be given appropriate attention. The desirability of holding a consultation meeting on the issues arising from industrial restructuring was pointed out by one participant.

51. The conclusions and recommendations on issue No. 1 are contained in paragraph 3. The recommendation on the convening of the Second Global Consultation Meeting on the Food-Processing Industry is contained in paragraph 5.

IV. REPORT OF WORKING GROUP II
ON THE EXPANSION OF TECHNICAL AND ECONOMIC CO-OPERATION
FOR STRENGTHENING THE FOOD-PROCESSING SECTOR IN DEVELOPING COUNTRIES,
INCLUDING ACCESS TO MARKETS

Summary of discussions

52. A number of participants stressed the need to emphasize the strategic importance of the food-processing industry in enhancing the food security and self-sufficiency of the developing countries, as well as in earning foreign exchange. It was commonly agreed that the methods and priorities to be assigned to the industry should be decided by the competent national authorities. One participant pointed out that the requirements of foreign markets should be taken into consideration in the early stages of project design if exports were envisaged. Another participant emphasized the great diversity between the various branches of the food-processing industry, which called for different approaches to the problems encountered. The discussion was focused on topics of major importance for the development of the sector, outlined in the following paragraphs.

53. Many participants discussed the role to be played by alternative partners for international co-operation in the food-processing industry, such as transnational corporations, small and medium-sized firms and co-operatives and other economic actors.

54. Several participants stressed the importance of the role of co-operatives and small and medium-scale enterprises of developed countries; they pointed out the advantages of co-operation with those enterprises, especially since their flexible position permitted them to adapt technology, and to provide the related training, organization and management, technical services etc. Furthermore, they felt that co-operation with co-operatives and small and medium-scale enterprises would allow developing countries to negotiate on a basis of greater equality. One participant added that co-operatives in his country were willing to undertake long-term commitments in co-operation with developing countries in order to provide services throughout the project life. UNIDO was requested to play an active role in helping developing countries to identify potential partners for international co-operation in that sector.

55. Participants emphasized the vital importance of training at various levels, and particularly at the intermediate level, using facilities available in both developed and developing countries. It was emphasized that training programmes in developed countries needed to be adapted to the requirements of the developing countries. Furthermore, the concept of continuous training should be adopted, to enable workers and staff to keep abreast with the latest developments. Emphasis was placed on the need to strengthen and expand national and regional training facilities located in developing countries. Several participants noted the need for information on training sources related to specific technologies and to the requirements of developing countries.

56. Several participants pointed out the need to adapt food-processing technology to the conditions and scale corresponding to the market size and resource base, in keeping with the technical capabilities and socio-economic environment of developing countries. Some participants felt that the access to technology did not pose a problem, while others pointed out the problem of the high prices of technology, its capital intensity, insufficient adaptation to local conditions etc. Some participants stated that one way of alleviating the problems was through the better use of engineering and consulting services from developed countries, as well as the strengthening of those services in developing countries.

57. Many participants discussed the advantages and disadvantages to be derived from the establishment of mini-processing plants. Some participants stated that many such plants provided an effective alternative on the grounds of location, infrastructure and local marketing requirements. Other participants noted the limited productivity and the potential diseconomies of scale. Several participants suggested that UNIDO should investigate the experience gained from mini-processing plants and to disseminate the information obtained.

58. Several participants stressed the importance of research and development in product and process design, suited to the requirements of the developing countries. It was suggested that "twinning" arrangements, for example, and the strengthening of national and regional research and development institutions and their linkage to industry should be given greater emphasis. The need was also pointed out for mechanisms to be created for the dissemination of research and development information.

59. A number of participants noted the importance of financing the establishment and operation of the food-processing industry, and the need for a greater flexibility in the methods of repayment of loans by way of barter and other agreements. Several participants noted the difficulties of financing studies and investigations in the preliminary phases of industrial co-operation arrangements; a few participants noted that provisions existed in some regional and international financial mechanisms for financing such activities; one participant suggested that, despite such provisions, there was a need to increase the availability of such financing. One participant pointed out problems arising from the international flow of investments in the food-processing industry and the need for Governments to create favourable investment climates. Investment by transnational corporations was directed to only some of the developing countries, so that the majority of the developing countries had to rely on multilateral or bilateral sources of foreign aid, which one participant considered did not, in many cases, pay sufficient attention to the upgrading of existing technologies and small and medium-sized projects.

60. Many participants considered the terms and conditions of trade, including marketing arrangements. Some expressed the view that there was a need to relax tariff and non-tariff barriers levied on exports of manufactured foods by developing countries. Others drew specific attention to the importance of conforming to international and regional standards for food products. Some participants also stated that such standards should not become hidden barriers to trade.

61. Several participants from developing countries stressed the urgent need to strengthen regional and subregional co-operation in the food-processing industry, which, it was noted, was particularly important for small developing countries with limited financial, market and raw material potentials. One participant suggested that regional consultations on the food-processing industry should be convened. One participant drew attention to the fact that a group of developing countries had decided to allocate sizeable financial resources to the development of their food-processing industries.

62. Some participants stressed that a frame of reference for international co-operation should be developed in order to ensure that a coherent and comprehensive approach was taken towards acquisition of the technology, training, financing, marketing etc. required for the establishment of an integrated food-processing chain.

63. The conclusions and recommendations on issue No. 2 are contained in paragraph 4. The recommendation on the convening of the Second Global Consultation Meeting on the Food-Processing Industry is contained in paragraph 5.

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Annex II

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<u>Document symbol</u>	<u>Title</u>
<u>Basic documents</u>	
ID/WG.345/1	Issue No. 1: Strengthening food-processing industries through the integrated development of all sectors of the food production, processing and marketing chain
ID/WG.345/2 and Corr.1	Issue No. 2: Expansion of technical and economic co-operation for strengthening the food-processing sector in developing countries, including access to markets
ID/WG.345/3/Rev.1	First global study on the food-processing industry
ID/WG.345/4	Provisional agenda
ID/WG.345/4/Rev.1	Agenda
ID/WG.345/5 and Add. 1 and 2	Draft report
<u>Background papers</u>	
ID/WG.295/1	Report of the global preparatory meeting for a consultation on the food-processing industry
UNIDO/PC.5 and Corr.1	The role of co-operatives in food production, processing and marketing in India: a case study
UNIDO/PC.6 and Corr.1	Case study on agro industry: "PODRAVKA", Yugoslavia
UNIDO/PC.8	Report of the Expert Group Meeting on the Role of Co-operatives in the Development of Food-Processing Industries in Developing Countries
UNIDO/PC.12	Barriers to processed food imports in developed countries: protectionism and problems of access to markets of developed countries in the processed food sectors and possible measures for eliminating trade barriers
ID 223/3-3	Aide-mémoire for the First Consultation on the Food-Processing Industry
ITC/TD/26	Trade promotion and export marketing of processed food products: future needs and challenges for developing countries

Other documentation available at the
Consultation

Appropriate Industrial Technology for Food Storage and Processing,
UNIDO monograph on appropriate industrial technology No. 7 (ID/232/7)

Appropriate Industrial Technology for Sugar, UNIDO monograph on
appropriate technology No. 8 (ID/232/8)

Appropriate Industrial Technology for Oils and Fats, UNIDO monograph
on appropriate technology No. 9 (ID/232/9)

World Industry in 1980 (United Nations publication, Sales No. E.81.II.B.3)

Document symbol

UNCTAD/CD/230 and
Add. 1-12

Statistics relevant to the evaluation of the impact of trade barriers
on the exports of primary and processed commodities of developing
countries:

- Meat and meat preparations (Add.1)
- Cocoa and products (Add.2)
- Sugar and confectionery (Add.3)
- Fruits (Add.4)
- Dairy products (Add.5)
- Cereals (Add.6)
- Fish (Add.7)
- Oils and fats (Add.8)
- Coffee and tea (Add.9)
- Animal foods and feeds (Add.10)
- Beverages (Add.11)
- Vegetables (Add.12)



