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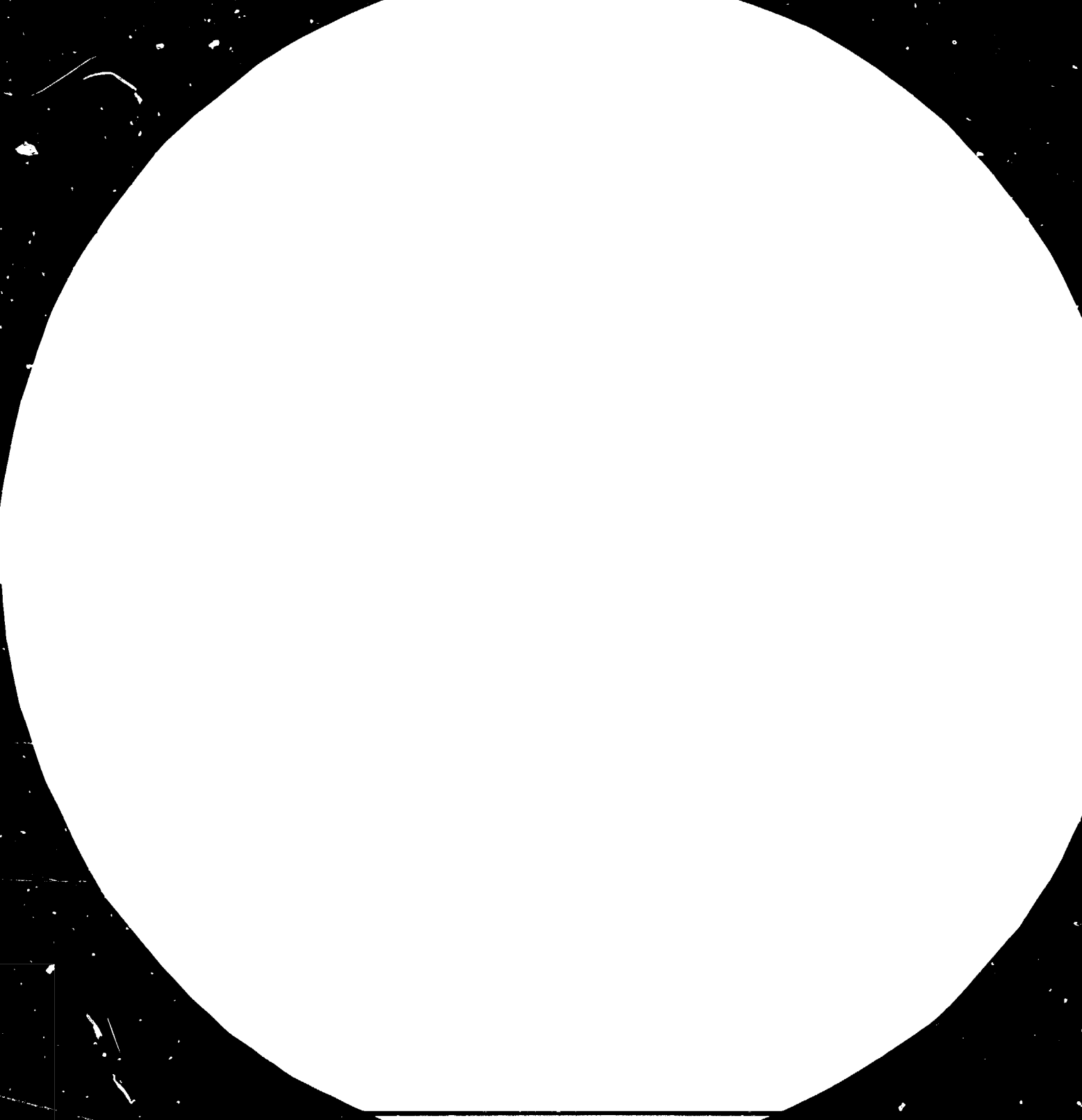
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UNITED NATIONS INDUSTRIAL DEVELOPMENT ORGANIZATION

SECOND
CONSULTATION
ON THE
FOOD-PROCESSING
INDUSTRY
WITH SPECIAL
EMPHASIS ON
VEGETABLE OILS
AND FATS .

Copenhagen, Denmark, 15-19 October 1984

REPORT

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PREFACE

The Second General Conference of the United Nations Industrial Development Organization (UNIDO), held at Lima, Peru, in March 1975, recommended that UNIDO should include among its activities a system of continuing consultations between developed and developing countries with the object of raising the share of the developing countries in world industrial output through increased international co-operation.^{1/} The General Assembly, at its seventh special session in September 1975, endorsed the recommendation and requested UNIDO to implement it under the guidance of the Industrial Development Board.

Twenty-three Consultations have been convened since 1977 covering the following industries and topics: capital goods, agricultural machinery, iron and steel, fertilizer, petrochemical, pharmaceutical, leather and leather products, vegetable oils and fats, food-processing, industrial financing, training of industrial manpower, and wood and wood products.

In May 1980, the Industrial Development Board decided to place the System of Consultations on a permanent basis, and in May 1982 it adopted the rules of procedure^{2/} according to which the System of Consultations was to operate, including its principles, objectives and characteristics, notably:

The System of Consultations shall be an instrument through which the United Nations Industrial Development Organization (UNIDO) is to serve as a forum for developed and developing countries in their contacts and consultations directed towards the industrialization of developing countries;^{3/}

The System of Consultations would also permit negotiations among interested parties at their request, at the same time as or after consultations;^{4/}

Participants of 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;^{5/}

1/ Report of the Second General Conference of the United Nations Industrial Development Organization (ID/CONF.3/31), chapter IV, "The Lima Declaration and Plan of Action on Industrial Development and Co-operation", para. 66.

2/ The System of Consultations (PI/84).

3/ Ibid., para. 1.

4/ Ibid., para. 3.

5/ Ibid., para. 23.

Each Consultation shall formulate a report, which shall include conclusions and recommendations agreed upon by consensus and also other significant views expressed during the discussions.^{6/}

The Industrial Development Board, at its seventeenth session in 1983, decided to include the Second Consultation on the Food-Processing Industry with Special Emphasis on Vegetable Oils and Fats in the programme of Consultations for the biennium 1984-1985.^{7/}

^{6/} Ibid., para. 46.

^{7/} Report of the Industrial Development Board on the work of its seventeenth session (Official Records of the General Assembly, Thirty-eight Session, Supplement No. 16 (A/38/16)).

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INTRODUCTION

1. The Second Consultation on the Food-Processing Industry was held at Copenhagen, Denmark, from 15 to 19 October 1984. The Second Consultation was attended by 143 participants from 58 countries and 10 observers from 10 international organizations (see annex I).

Background to the Second Consultation

2. The First Consultation on the Vegetable Oils and Fats Industry was held at Madrid in 1977,^{1/} and focused on:

(a) The prospects for the global growth of that industry up to the year 2000, and the resulting policy implications;

(b) Modes of international co-operation needed to establish new production capacity in developing countries.

3. The First Consultation on the Food-Processing Industry was held at The Hague in 1981,^{2/} and focused on the need:

(a) To strengthen the food-processing industry through an integrated development of the food production, processing and marketing chain;

(b) To expand technical and economic co-operation in the industry in developing countries, including access to markets.

4. The Industrial Development Board, at its seventeenth session in April-May 1983,^{3/} decided to include the Second Consultation on the Food-Processing Industry with Special Emphasis on Vegetable Oils and Fats in the programme of Consultations for the 1984-1985 biennium.

^{1/} Report of the First Consultation on the Vegetable Oils and Fats Industry (ID/WG.260/9).

^{2/} Report of the First Consultation on the Food-Processing Industry (ID/278).

^{3/} Report of the Industrial Development Board on the work of its seventeenth session (Official Records of the General Assembly, Thirty-eight session, Supplement No. 16 (A/38/16)).

5. Preparatory activities for the Second Consultation included the convening of two expert group meetings by UNIDO. The first meeting, which was held at Alexandria from 24 to 27 October 1983, considered the problems of integrating the agricultural and industrial sectors in order to develop the vegetable oils and fats indus.-v (ID/WG.404/5). The second meeting, held at Vienna from 6 to 8 February 1984, considered the constraints to the diversification of processing activities in developing countries (UNIDO/PC.97).

AGREED CONCLUSIONS AND RECOMMENDATIONS

Issue 1: An integrated approach to food processing:
vegetable oils and fats, animal feed, meat and dairy industries

6. The Consultation agreed on the following conclusions:

(a) An integrated approach can often be the most appropriate strategy for the development of the food-processing industry in the developing countries. Policy measures for such an approach can best be formulated through co-ordination among the relevant national institutions in a given branch of the industry. The integrated approach opens moreover a wide range of areas of co-operation which should cover all essential activities in this field;

(b) For the development of the food-processing industry, particularly the vegetable oils and fats sector, both Governments and industries should effectively interact to implement solutions to fully utilize installed capacity by an integrated system that would embrace all facets of the problem, namely, inputs of raw materials, technology, upgrading, marketing and planning;

(c) Regional consultations on the food-processing industry, preferably managed by UNIDO, could provide an opportunity to find solutions to regional issues and problems; such regional consultations should be organized before any further possible global consultation on this subject.

7. The Consultation recommended that UNIDO, in the framework of existing resources or those that may be provided voluntarily for these purposes, should:

(a) Undertake a technical assistance project, upon request, in a developing country to illustrate the application of the integrated approach to the oil-seed-protein subsystem, including meat and dairy industries;

(b) Consider organizing regional consultations in the sector, possibly in conjunction with other relevant UNIDO regional meetings to examine in particular regional collaboration arrangements for the manufacture of components and spare parts and instruments; the possibility of establishing regional industry associations; and the identification of solutions to under-utilized industrial capacities;

(c) Arrange for a periodic review by independent advisers of development in the vegetable oils and fats processing industry including the potential for further technical international co-operation, transfer of technology, and research and development;

(d) Prepare a list of organizations and governmental institutions in both developed and developing countries capable of giving technical assistance to developing countries in the field of food-processing, especially at the level of training, feasibility studies and advisory services; and promote communications between the developing countries that are ready to give technical assistance, including advice on the development of systems of integrating production and processing, to other developing countries;

(e) Examine the prospects for processing vegetable proteins for human consumption, especially where there is a major spectre of malnutrition and the availability of land is limited;

(f) Promote the increasing production of edible oils and fats in the developing countries where appropriate;

(g) Bring to the attention of the appropriate United Nations agencies the impact of tariff and non-tariff barriers on the development of the vegetable oil and fats industry;

(h) Strengthen its activities related to the training of all personnel involved in processing, maintenance of equipment, quality control, management and marketing in the vegetable oils and fats industry.

Issue 2: The role of co-operatives and small- and medium-scale enterprises in the integrated development of the food-processing industry

8. The Consultation concluded that in co-operation arrangements between co-operatives and small- and medium-scale enterprises in industrialized countries and partners in developing countries a clear distinction must be made between aid and commercial relations and that the nature of the latter must reflect the level of industrialization in the partner country. It further concluded that many of the requirements for increased involvement of co-operatives in industrialized countries were equally applicable to the co-operatives and small- and medium-scale enterprises of developing countries.

9. The Consultation concluded that increased involvement of co-operatives as well as small- and medium-scale enterprises in international co-operation for the development of the food-processing industry in developing countries would be highly beneficial to production, processing and marketing operations. The participants in the Consultation should undertake to further such involvement by various measures; to this effect the Consultation recommended that they:

(a) Promote and arrange increased direct contacts between relevant management personnel and their counterparts as well as second suitable personnel to development projects;

(b) Consider forming consortia, with other co-operatives, other organizations and enterprises and also financial institutions to strengthen their ability to participate in development projects.

10. The Consultation concluded that Governments of industrialized and developing countries should consider intensifying the involvement of co-operatives and small- and medium-scale enterprises in their collaboration with each other concerning industrial development. The Governments of developing countries should create favourable conditions for co-operatives generally and for extended partnership between their industrial enterprises and co-operatives and small- and medium-scale enterprises in other countries. To this end, the Consultation recommended that Governments should:

(a) Give active support to co-operatives and small- and medium-scale enterprises in helping the food-processing industry in developing countries, inter alia, by involving them in activities relating to training and education, notably the training of trainers;

(b) Aim at close co-ordination between all the Government authorities and non-governmental organizations responsible for the various factors affecting the food-processing industry;

(c) Consider using co-operative agencies for channelling aid to co-operatives in developing countries;

(d) Assess their policies towards co-operatives and small- and medium-scale enterprises in order to encourage their extended involvement in co-operation with developing countries;

(e) Encourage the use of the services offered by the co-operatives of industrialized and developing countries in implementing technical co-operation projects, in particular for carrying out feasibility studies, possibly leading to other involvements such as management contracts;

(f) Consider convening, in consultation with UNIDO, or assisting UNIDO in convening, regional and sub-regional meetings to identify specific conditions and requirements for extended collaboration between the co-operatives of industrialized countries and various partners from developing countries in the development of the food-processing industry, following the example of the Conference on the Potential for Co-operative Food Processing in Developing Countries: towards Global Inter-Dependence held at Ottawa.

11. The Consultation concluded that international organizations, governmental as well as non-governmental, had an important task in supporting a desirable increase in the involvement of co-operatives and small- and medium-scale enterprises in the development process. In the field of industrial development, and notably in the food-processing sector, the role of UNIDO was of special importance, and increased and more concentrated UNIDO activities to further the involvement of co-operatives and small- and medium-scale enterprises in the development of that sector would be highly useful. The Consultation therefore recommended that UNIDO, within the framework of existing resources or those that might be provided voluntarily for that purpose, should:

(a) Prepare case studies on specific projects in developing countries at different levels of industrialization and indicate the nature of the role of co-operatives and small- and medium-scale industries in the development of agro-food industries;

(b) Prepare, based on experience, suggestions for measures, including those for trade promotion, to stimulate co-operation between the co-operatives of developed and the more industrialized developing countries and the food-processing industry in developing countries;

(c) Examine the possibility of the practical application of a scheme, including co-operative organizations, in two or more countries with UNIDO as the promoting and monitoring agency;

(d) Stimulate an increased flow of information on (i) possible co-operative partners and small- and medium-scale enterprises in industrialized and developing countries by pursuing the establishment of a roster; (ii) suitable projects in the food-processing industry in developing countries; (iii) creating opportunities for more frequent contacts between interested parties; and (iv) utilizing existing activities, such as trade fairs, to promote co-operation;

(e) Contribute to the improved co-ordination of activities between United Nations organizations and other international organizations dealing with co-operatives.

I. ORGANIZATION OF THE CONSULTATION

Opening of the Consultation

12. The Head of the Negotiations Branch of the United Nations Industrial Development Organization (UNIDO) opened the Second Consultation on the Food-Processing Industry with Special Emphasis on Vegetable Oils and Fats in the morning session. The election of officers took place in that session, and the formal opening speeches were postponed till the afternoon session.

13. The Second Consultation was addressed by the Deputy Executive Director of UNIDO, representing the Executive Director who regrettably could not attend. On behalf of the Executive Director, the Deputy Executive Director welcomed the participants and expressed gratitude to the Government of Denmark for hosting the Second Consultation.

14. He said that it was necessary to seek measures of international co-operation to overcome the effects of the economic crisis. That was nowhere more imperative than in the food-processing sector particularly in view of the famine in parts of Africa. He stressed the importance of that sector because of the employment and income it would generate as well as its capability to preserve food, thereby increasing the availability of food and decreasing waste. Also, owing to urbanization the demand for processed foods would increase, which would necessitate an expansion of the food-processing capabilities of the developing countries. Many of those countries thus far had been unable to meet the demands on that industry, which had resulted in adverse social and political consequences. He hoped that the Second Consultation would help to increase the potential of that industry, and wished it every success in the endeavour.

15. Ambassador Jens Ostenfeld, the Deputy Under-Secretary of State (Development), on behalf of the Minister for Foreign Affairs of the Government of Denmark, welcomed the participants to Copenhagen. Having underlined the significant role the food-processing industry played in the economies of most of the developing countries, he mentioned the experience of his own country which, in the course of only two or three generations, had been transformed

from a rural economy into a modern industrialized country. It was in part through close and dynamic links between agriculture and industry that Denmark had gained a reputation as a high-quality producer of a wide range of agro-industrial products.

16. He expressed the hope that the participants at the Consultation would take advantage of the opportunity that the Consultation provided for debate and exchange of views in particular between people having practical experience in the food-processing sector. He was confident that the Danish participants, exhibitors and companies to be visited would be enthusiastic in sharing and discussing aspects of their knowledge. He hoped that the participants would go about their task in a pragmatic and business-like manner.

17. The Head of the Negotiations Branch joined the previous speakers in their statements on the importance of the food-processing industry. He said that a solution to the problem of food scarcity should be sought in the agro-industrial context. He drew the attention of the participants to the outcome of the First Consultation on the Food-Processing Industry and pointed out that the current discussion evolved from the conclusions and recommendations of that Consultation.

18. One area of concern was the integrated development of the food-processing industry on which he made certain suggestions that the Consultation might wish to deliberate, including the need for the following: an examination of the global changes occurring in the supplies of raw materials for the vegetable oils and fats industry, and an assessment of the utilization of installed industrial capacities for processing those raw materials; the preparation of national development plans and policies for the integration of the sector, in order to reduce external dependence; the creation of a standing body of international agro-industrial experts that could guide external technical assistance agencies and developing countries on the realization of the potential of the vegetable oils and fats and animal protein subsystem.

19. Another area was the potential involvement of the food-processing co-operatives of developed countries as partners in the development of that industry in developing countries. He felt that those co-operatives possessed the know-how that could be useful not only to co-operatives, but also to all other types of enterprises in such countries.

Election of officers

20. The following officers were elected:

Mogens Jul (Denmark), Associate Professor, Royal Veterinary and Agricultural University	Chairman
Edmundo Arias Torres (Mexico), Profesor, Instituto Politécnico Nacional, y Vice Presidente, Instituto Mexicano de Tecnologías Apropriadas	Rapporteur
Ali Abdel-Rahman Amin (Egypt), Consulting Engineer, Egyptian Salt and Soda Co.	Vice-Chairman
Dato' B. Bek-Nielsen (Malaysia), Managing Director, United Plantations Berhad	Vice-Chairman
Joachim Schede (Germany, Federal Republic of), Director, Association of the German Margarine Industry	Vice-Chairman
István Varga (Hungary), Director, "Komplex" Foreign Trade Company	Vice-Chairman

21. The Chairman, upon his election, took the opportunity to say that the Second Consultation should be guided by the mandate of UNIDO, the reports of the previous consultations on the two sectors concerned and the objectives of the System of Consultations as contained in the rules of procedure;^{4/} he referred particularly to the objectives concerned with co-operation between the developing and the developed countries and the possibility of allowing for negotiations between interested parties. Those objectives, he felt, would provide for negotiations between enterprises from developed countries interested in co-operation with developing countries.

4/ The System of Consultations (PI/84).

Adoption of the agenda

22. The following agenda was adopted:

1. Opening of the Consultation
2. Election of Chairman, Vice-Chairmen and Rapporteur
3. Adoption of the agenda
4. Presentation of the issues by the secretariat
5. Discussion of the issues:
 - (a) Issue 1:
 - (i) An integrated approach to food processing: vegetable oils and fats, animal feed, meat and dairy industries
 - (ii) Ways to improve capacity utilization in the vegetable oils and fats industry in developing countries
 - (b) Issue 2:

The role of co-operatives and small- and medium-scale enterprises in the integrated development of the food-processing industry
 - (c) Other matters
6. Conclusions and recommendations
7. Adoption of the report of the Consultation.

Establishment of working groups

23. The participants considered the working procedures for the Second Consultation and decided to have two working groups to discuss the two issues presented. A schedule was agreed upon with a minimal overlap between the sessions in order to allow participants to take part in both discussions.

24. Ousmane Dieng (Senegal) Directeur, Société électrique et industrielle du BAOL, was appointed Chairman of the Working Group on Issue 1 and Kenneth J. McCready (Canada) Chief, Producer Organizations Section, Marketing and Economics Branch, Agriculture Canada, was appointed Chairman of the Working Group on Issue 2.

Adoption of the report

25. The report of the Second Consultation, including the conclusions, recommendations and reports of the two working groups, was adopted by consensus on Friday, 19 October 1984, at the final plenary.

Documentation

26. Participants expressed their appreciation to UNIDO of the well-prepared documentation issued for the Second Consultation as listed in annex II.

II. REPORT OF THE PLENARY

Presentation of the issues

Issue 1: An integrated approach to food processing: vegetable oils and fats, animal feed, meat and dairy industries (ID/WG.427/6 and Add.1)

27. A representative of the secretariat recalled the conclusions and recommendations of the First Consultation on the Food-Processing Industry regarding the need for developing countries to adopt an integrated approach to the development of their industry. Subsequently, UNIDO had taken as a model the sub-system composed of oil-seed and animal protein, and had examined the network of techno-economic relationships within the sub-system (ID/WG.427/4).

28. He suggested that the Second Consultation should consider the following:

(a) The more effective use of local resources through the development of alternatives to the maize-soya model;

(b) The optimization of the value of oil products through the application of systematic pricing systems.

29. With regard to the specific problem of the under-utilization of the capacity of the vegetable oils and fats industry in developing countries, he reviewed a wide range of causes and suggested the following measures:

(a) Adoption of organizational, social, economic and financial policies to ensure an adequate supply of raw materials;

(b) Application of an integrated approach to the development of that industry at the national level, and possible co-ordination at the bilateral or subregional level;

(c) Development of adequate marketing mechanisms, including the implementation of quality standards and specifications;

(d) Co-operation between developing countries to increase capacity utilization through joint ventures;

(e) Promotion of the establishment of joint ventures between developing and developed countries for oil-seed processing, utilizing existing modern installations in the developing countries.

Issue 2: The role of co-operatives and small- and medium-scale enterprises in the integrated development of the food-processing industry (ID/WG.427/7)

30. A representative of the secretariat recalling the recommendations of the First Consultation on the Food-Processing Industry, suggested that participants consider the following:

(a) Why should co-operatives and small- and medium-scale enterprises be identified as additional potential partners for collaboration with developing countries?

(b) What should be the specific conditions and requirements for expanded partnerships between the co-operatives of developed countries and various partners of the developing countries?

31. In presenting possible reasons for consideration by the Consultation, he noted that the small- and medium-scale enterprises faced problems with regard to obtaining financial backing, including credit facilities, risk guarantees and extra loan guarantees. In addition, those enterprises required an effective channel of information to facilitate their contacts with developing countries.

Summary of discussion

32. The plenary considered general aspects of the issues. One participant, referring to a paper prepared by representatives of his country, hoped that the discussion would lead first to a consensus on the general principles and concepts regarding an overall project for the integrated development of the food-processing industry in developing countries, and secondly to the identification of specific areas of co-operation and action-oriented measures to support them. In reference to the important potential role of agricultural organizations and co-operatives, as well as small- and medium-scale enterprises, he pointed out some of their limitations, and suggested that those enterprises be provided with support to facilitate the development of their activities at the international level.

33. Another participant agreed with the importance for developing countries of adopting an integrated approach to the development of their food-processing industry. In that way, developing countries could increase the use of their raw materials, establish national industries and utilize their full capacity although there was no single policy that could be adapted to the needs of each country. International co-operation, he continued, could be effective in the implementation of that approach, particularly if different types of partner were available. The setting up of an information system was important to foster international co-operation in the areas of training, research and development, marketing and transport.

34. In the view of one participant, foreign aid should be reoriented since it had yielded negative results for a variety of reasons. He stressed that the key problem facing many developing countries was the low price at which vegetable oils were sold on the international market, which had resulted in farmers not being adequately rewarded for their labour. An observer agreed with that, and added that the inadequate supply of raw materials was often caused by a lack of synchronization between agricultural policies and techniques, and that industrialization policies for urban and rural areas should be reviewed. With regard to international co-operation, that observer called upon the co-operatives of developed and developing countries to increase their involvement.

III. REPORT OF THE WORKING GROUP ON ISSUE 1:
AN INTEGRATED APPROACH TO FOOD PROCESSING: VEGETABLE OILS AND FATS,
ANIMAL FEED, MEAT AND DAIRY INDUSTRIES

Summary of discussion.

35. There was recognition that the integrated approach was the most appropriate strategy for the further development of the food industry. However, it was also recognized that there was no standard strategy applicable to countries at different stages of development.

36. One participant said that there was a need to define the limits of integration; he questioned the rationality of certain operations whereby food grains were fed to animals with the low conversion rate of 8 kilocalories of grain yielding, in the case of poultry, only 1 kilocalorie of meat.

37. Regarding the world food problem, one participant mentioned that poverty rather than food shortages was the main obstacle to adequate nutrition. Since the main potential for industrial development in many developing countries was in the food-processing area, industrial development in that field should be given high priority because of its income-generating potential. However, the food industry was often considered suspect because it added to the cost of foods, but from a nutritional point of view, its virtue lay in its income-generating potential. If the food-processing industry were organized to benefit the poorer population groups, its ability to provide jobs and income for the poor would in most cases contribute to nutritional as well as to socio-economic development. In that context, some participants pointed out that exports from developing countries of high-value food products, such as shrimps or groundnut oil, might be necessary in order to provide foreign exchange for the import of basic foods, agricultural implements and spare parts.

38. Other participants said that there was a need for developing countries to co-ordinate agricultural, industrial, marketing and consumption policies in order to formulate a comprehensive policy for applying the integrated approach to the development of agro-food processing. On that basis it would be easier to make optimal use of external technical, financial and other assistance.

39. Another participant expressed his agreement with the integrated approach for the oil-seed-protein sub-system, but indicated that integration was difficult to achieve since transnational corporations (TNCs) operated simultaneously with national enterprises in the separate components of the sub-system but had different objectives.

40. A few participants said that developing countries should not attempt to achieve complete integration, but should seek to make the best use of the existing opportunities within the current international trading structure, thereby optimizing global production in relation to the prevailing patterns of demand. One participant stated that such trading structures had been proven historically to lead to inequality and had relegated developing countries to the position of suppliers of raw materials. He added that some developing countries had deviated from the principle of optimal trading efficiency. They had been better able to realize efficient industrial processing of agricultural raw materials, and also to integrate their agro-industrial structures. Thereby, they had become independent of the international market for industrial products.

41. One participant stressed the need for the establishment of close links between agriculture and industry. While government authorities might not be in a position to ensure such links, they could provide infrastructure to strengthen them.

42. One participant stated that while integration was essential to the development of the food industry, it was greatly affected by costing and price structure to which attention should be paid in industrial planning.

43. One participant expressed the view that a tank farm (buffer storage facilities) should be established, particularly for palm oil, in order to reduce the negative effects of fluctuating world market prices. He suggested

that UNIDO be asked to consider such a project in co-operation with UNCTAD and the other organizations concerned. However, another participant was of the opinion that sufficient storage capacity was available in the consumption areas.

44. Others stressed the importance of governmental regulations for the food-processing sector as the basis for industrialization policies.

45. One participant referred to the difficulties of establishing coherent policies for integrated development, and proposed that seminars be organized in developing countries with the participation of international organizations and representatives of developed countries to advise on the definition of national integrated development policies.

46. Another participant gave an example of integration between the vegetable-oil industry and other food sectors at the country level. In that context, he drew attention to the need for co-operation between UNIDO, FAO and other United Nations bodies.

47. Some participants mentioned that changes in eating habits and raw-material supply necessitated the introduction of changes in the industrial structure. It was suggested that developing countries monitor those changes to refine and adjust policies for the development of their food industry.

48. One participant indicated that developing countries ought to give priority to food self-sufficiency rather than exports. Another participant stressed the need for developed countries to facilitate exports of processed oils and to remove trade barriers.

49. Another participant indicated that the International Trade Centre (ITC) might assist, for example, with documentation on the trade in animal feeds and vegetable oils.

50. One participant suggested that UNIDO be asked to prepare material suitable for national seminars on the food-processing industry, with special attention paid to the vegetable oils and fats industry.

51. Many participants reported the situation of oil-seed processing in their countries, and requested assistance from developed countries ranging from finance to technical assistance and marketing.

52. Several participants indicated a need for village-level processing units for oilseeds, etc. A participant offered technical assistance in that area.

53. One participant stressed the need for special collaboration for developing countries with regard to improving the quality of products to comply with export regulations and to providing favourable export opportunities for products from those countries, particularly because some of them had a surplus of commodities that they were unable to market locally. Another participant described the content of an existing co-operation programme in the production of oil-seed-protein and in product and process development.

54. One participant noted the need to have more direct access to potential buyers without having to go through intermediaries operating in the international trade of oil seeds and oil-seed products.

55. Many participants from developed and some of the more industrialized developing countries expressed their willingness to assist developing countries. One participant gave an example of how a fully integrated cottonseed processing project had benefited a developing country. Other such examples were cited. Another participant stressed the need for a proper evaluation of the technical and financial feasibility of projects before concluding agreements. All co-operation agreements should be mutually beneficial.

56. One participant drew attention to the importance of establishing enterprises in the public sector, and offered the co-operation of his country in making available expertise, training and facilities.

57. Another participant suggested that UNIDO should update a list of agencies and government institutions capable of giving technical assistance to developing countries. He said that Governments should provide UNIDO with the required information.

58. The ways and means of co-operation were widely discussed. One participant pointed out that most developing countries were aware of their problems and knew their requirements; however, priorities for development had to be set and feasibility projects had to be determined. He stressed that the training element should receive special attention. Training had to be adjusted to the requirements of the country that was expected to benefit from it. One participant stressed that training should include processing techniques and quality control. Training in sophisticated production plants and laboratories might therefore not be practical unless a "sandwich" approach, which combined theoretical and practical training, were adopted. Moreover, research and development facilities existing in certain countries could be made available to other countries.

59. Some participants suggested that UNIDO be asked to consider promoting contacts between those developing countries that were ready to give technical assistance and other developing countries.

60. One participant stated that there was a need for co-operation with regard to financing and also joint ventures for the rehabilitation of existing industries. UNIDO might consider acting as intermediary in that context.

61. One participant indicated that inadequate industrial planning, changes in trade policies and insufficient agricultural production were among the main causes of current under-utilization of capacity in the vegetable oils and fats sector in developing countries.

62. Adequate maintenance programmes and improved supplies and buffer stocks of spare parts were indicated by two participants as key elements in overcoming one of the constraints to capacity utilization. Several participants indicated that their country might be willing to support financially the provision of spare parts and machinery in developing countries or the production theory through joint ventures.

63. Several participants stressed the importance of UNIDO in dealing with the problems that might arise due to population growth and urbanization.

IV. REPORT OF THE WORKING GROUP ON ISSUE 2:
THE ROLE OF CO-OPERATIVES AND SMALL- AND MEDIUM-SCALE ENTERPRISES
IN THE INTEGRATED DEVELOPMENT OF THE FOOD-PROCESSING INDUSTRY

Summary of discussion

54. Many participants spoke on the development of the production base in the developing countries, and the role of co-operatives in that context. Some of them indicated that they had well-established co-operatives in the agricultural as well as the food-processing sectors (fisheries, live-stock, dairy, copra, cotton, olive oil, sugar), while others said that the role of the co-operative sector was very limited. Several participants stressed that the participation of co-operatives in the development of the production base must be determined by the specific conditions and selected model of development of a given country. It was agreed that whereas those problems were of the utmost importance, the discussion had to focus on how to involve and motivate the co-operatives and small- and medium-scale enterprises and facilitate their participation in the integrated development of the food-processing sector.

65. Many participants indicated interest in an increased involvement in the promotion of the food-processing industry of co-operatives and small- and medium-scale enterprises of industrialized or developing countries. One participant indicated that his country preferred to work on a South-South basis, since its associations with developed countries had not always been beneficial.

66. Several participants cited problems of training in technical and managerial skills. Those were the skills for which external assistance provided by co-operatives and small- and medium-scale enterprises would be particularly welcome either by training programmes or joint ventures that provided "on-the-job" training.

67. Other participants expressed their willingness to provide various forms of assistance and technical collaboration, particularly in training. Some participants described many areas, such as joint ventures, financial assistance, transfer of technology and management, in which their co-operatives would assist developing countries. The role and importance of consumer co-operatives in that context was underlined by some participants.

68. One participant detailed the objectives and outcome of the Conference on the Potential for Co-operative Food Processing in Developing Countries: towards Global Inter-Dependence held at Ottawa in August 1983. That Conference, even though its primary topic was the creation of opportunities for direct relations between co-operation in industrialized and developing countries, contributed to identifying the issues that were under consideration by the Second Consultation. Some of the conclusions of the Ottawa Conference emphasized the importance of comprehensive food policies related to integrated food processing, the need for better consultative mechanisms between co-operatives and Governments, requirements for expanded partnership and important role for international agencies in further co-operation in that area.

69. The Chairman then invited specific comments on the four questions raised in the Issue Paper on the role of co-operatives and small- and medium-scale enterprises in integrated development of the food-processing industry (ID/WG.427/7).

70. The participants made a number of observations on the first question: What were the factors in favour and against the extended partnership of co-operatives and small- and medium-scale enterprises in promoting integrated development of the food-processing sector?

71. They agreed with the conclusions of the First Consultation and the Ottawa Conference that it would be useful to extend the range of partners to include small- and medium-scale enterprises and co-operatives from developed countries and the more industrialized developing countries. Such new partners would be more suitable because of their long experience of food-processing industries, well-established institutional infrastructure, more equitable ownership

structure and ability to provide technology suited to the needs of the developing countries. It was also felt by some participants that co-operatives, because of their own experience and background, would be more in sympathy with the development objectives and aspirations of developing countries.

72. Several participants stressed that the identification of suitable counterparts in developing countries, which could be private, public or co-operative enterprises, was crucial.

73. The nature of the involvement of co-operatives and small- and medium-scale enterprises would vary depending on the economic structure and the development objectives of recipient countries. In developing countries with a low level of agricultural and processing activities, such involvement would be achieved through aid, which could include education and training. In developing countries with better-established agricultural and processing activities, the involvement of new partners could take the form of joint ventures for food processing. In countries where a well-developed agricultural and industrial structure existed, management contracts, training programmes and consultancy services would be of particular interest.

74. Several participants pointed out that the responsibility of the new partners to their members or shareholders put limits to their involvement. Arrangements for co-operation must relate to the objectives of the co-operatives, be consistent with their purpose and, in many instances, be commercially viable.

75. Factors related to the legislative, economic and educational environment were also stressed. A legal environment in developing countries conducive to foreign involvement, political stability, stability of currency and prices, good economic prospects for the specific industry and a basis for education, research and training were mentioned as characteristics to be sought prior to an extended collaboration.

76. One participant underlined the role of finance with regard to increased co-operation and the necessity to examine various possibilities such as triangular arrangements between financial institutions, suppliers and recipients, and activities undertaken by consortia of co-operatives.

77. In considering the questions in the Issue Paper (ID/WG.427/7, p.14) relating to collaboration and governmental policies, several participants enumerated the following main areas for collaboration: feasibility studies, training and management, storage and preservation techniques, industrial processing, institution building, technology and research, financing including co-financing.

78. For such collaboration to be viable, the partners from industrialized countries must be aware of the specific conditions in the developing partner countries, respect local conditions and involve suitably trained local personnel.

79. The importance of the participation of co-operatives in feasibility studies was underlined by some participants, as once those were undertaken by TNCs it was difficult for co-operatives and small- and medium-scale enterprises to become involved in any resulting project. Many participants listed specific instruments for co-operation activities such as contracts, consortia bidding, bilaterally funded feasibility studies, joint ventures, turn-key projects, consultancy services, franchise and licensing systems.

80. Some partners stressed the need to distinguish between co-operatives and small- and medium-scale enterprises, the latter group might at times need more stimuli and information before entering into co-operation with developing countries.

81. Many participants stressed the importance of government support to the co-operatives and small- and medium-scale enterprises that could be given through different types of policy measures, for example, financial, fiscal and legislative.

82. A few participants underscored the need to convene regional and subregional meetings to examine specific conditions and requirements for further collaboration.

83. Regarding the question in the Issue Paper (ID/WG.427/7, p.14) on the role of international organizations, including UNIDO, participants agreed on the importance of the supporting role of those organizations.

84. With respect to the instrumental role of UNIDO in promoting such collaboration, several participants underlined the need for an increased flow of information on both potential partners and suitable projects in developing countries. Such information should be facilitated by regular contacts between the parties involved.

85. Some participants expressed the view that there was a need to assure better co-ordination among those United Nations organizations as well as other international organizations that were directly involved in promoting the activities of co-operatives.

86. Some participants felt that UNIDO should prepare case studies of the current involvement of co-operatives and small- and medium-scale enterprises in the development of the agro-food industries in developing countries.

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Annex II

LIST OF DOCUMENTS

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Issue papers

- An integrated approach to food processing: vegetable oils and fats, animal feed, meat and dairy industries ID/WG.427/6 and Corr. 1
- Ways to improve capacity utilization in the vegetable oils and fats industry in developing countries ID/WG.427/6/ Add. 1

Background papers

- A differentiated approach to the industrialization of the agro-food sector in the developing countries ID/WG.427/3
- The context of agro-industry development and the stakes at issue ID/WG.427/4

Information papers

- Downstream processing activities in the vegetable oils and fats industry ID/WG.427/1
- Problems of development of the dairy industry in developing countries ID/WG.427/2
- Some aspects of the world white meat sector ID/WG.427/5
- Problems of the red meat industry ID/WG.427/8
- Performance and integrated approach to development of the vegetable oils and fats industry ID/WG.427/9
- Second world-wide study on "The vegetable oils and fats industry in developing countries: Outlook and perspectives" UNIDO/IS.477 *
- The vegetable oils and fats industry in developing countries: Statistical Digest UNIDO/IS.477/ Add.1 *

Issue 2

Issue paper

- The role of co-operatives and small- and medium-scale enterprises in integrated development of the food-processing industry ID/WG.427/7

Information paper

- Trends and issues in contractual arrangements in the food-processing industry ID/WG.427/11

