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COMMITTEE ON COMMODITY PROBLEMS

to the forty-ninth session of the Council of FAO

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FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS

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FORTY-NINTH SESSION OF THE FAO COUNCIL

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Appendix - List of Member Nations and International Organizations represented at the Forty-Second Session of the Committee

INTRODUCTION

1. The Committee on Commodity Problems (CCP) held its Forty-Second Session from 23 to 27 October 1967 at FAO Headquarters, Rome. The Session was attended by the representatives of 27 Member Governments of the Committee, observers from 28 Member Governments of FAO and from 11 international organizations ^{1/}.
2. In the absence of the Chairman, Miss I. Haas, first Vice-Chairman, acted as Chairman of the Session. Mr. Ram Saran (India) was elected Vice-Chairman for this Session.
3. The Committee adopted the Provisional Agenda for its Forty-Second Session (CCP 67/24).
4. The Committee was assisted during its session by a drafting group under the chairmanship of Mr. Ram Saran (India).
5. The Committee heard a statement by the representative of the Secretary-General of the United Nations Conference on Trade and Development (UNCTAD).

I. COMMODITY PROJECTIONS AND THE INDICATIVE WORLD PLAN FOR AGRICULTURAL DEVELOPMENT

1. Revision of commodity projections

6. In accordance with the request of the Committee at its Forty-First Session, the Secretariat had revised its provisional study Agricultural Commodities - Projections for 1975 and 1985 finalized in October 1966 (CCP 67/3). The revised study (CCP 67/3 Rev.) had been distributed in advance of the present session.
7. The Secretariat, in introducing the study, explained that account had been taken of the views expressed by the Committee at its last session, of the written comments received from governments and from international bodies and of further work done in FAO. Seven of the Committee's subsidiary bodies, as well as the International Cotton Advisory Committee, the International Rubber Study Group, the International Dairy Committee and the OECD Working Group on Meat, had given their views on projections of individual commodities.
8. Basically, the methodology of the projections remained the same as in the provisional study, although a few limited changes had been made, e.g. instead of reliance on income elasticity for projecting demand for coffee, cocoa and tea imports into the U.S.S.R. and eastern Europe, direct account had been taken of recently announced import policies. More information bearing on data and methodology had been included, such as a special chapter defining the commodity composition and technical conversion factors used in the food balance sheets. The production projections were now presented against a much fuller background of the past trends in the main countries individually. For a few commodities, alternative price assumptions had been introduced. As requested by the Committee, a summary of the whole document had been included.
9. The major change was that the report was now presented as a basically trend-oriented study. The policy implications of the observed trends had been discussed for individual commodity markets and for the food situation as a whole, but at the request of the Committee no attempt had been made in the revised study to assess the quantitative impact on commodity trade of alternative policy changes.

^{1/} A list of participants is given in the Appendix to this Report.

10. The Committee expressed general satisfaction with the improvements which had been introduced in the revised version and with the extent to which the Secretariat, within the limited time available, had been able to take account of the views it had expressed at the previous session. It considered that the revised study would be of value to governments in their planning and policy formulation, particularly to developing countries that did not possess the resources needed to undertake such work themselves. It stressed again, however, that caution needed to be exercised in the interpretation of the results of the projections study in view of limitations in the statistical data presently available for many countries and in the methodology so far developed. Some delegates urged that efforts should be made to introduce price variations into the methodology. Nevertheless, the Committee felt that the revised projections were probably the best that could be obtained at present and that, provided the limitations were borne in mind, their findings provided an indication for the identification of policy issues both national and international.

2. Major findings of the projections

11. The following were the main findings of the study with reference to the food situation, to trade in general and to the trade outlook for groups of commodities.

A. Food situation

- (i) There would be little change up to 1975 in the average per caput calorie intake in developed countries apart from a distinct improvement in southern Europe and Japan. By 1985 the margin of average calorie intake over requirements in all developed countries would be about the same as at the present time in the United States (para.56) ^{1/}.
- (ii) Taking the inequality of distribution into account, a large section of the population in developing countries would still remain undernourished in 1975. This problem could be effectively solved only by around 1985 and then only on the high GDP (Gross Domestic Product) assumption ^{2/}. If the growth of GDP was much lower than 5.5 to 6.0 percent a year, effective demand per caput would result in an adequate calorie level only well after 1985 (para.57).
- (iii) The problem of protein imbalance in developing countries would be little improved even by 1985 since any increase in the proportion of animal protein in the pattern of demand for food was likely to be offset by a fall in the proportion of vegetable protein (para.59).
- (iv) The projected food production in developing countries in 1975 would not match the growth in demand, both projected at constant prices, on either the high or the low GDP assumptions, although the disparity would be small in the former case. Thus, in the developing regions the levels of demand in 1975 could be satisfied only by a larger flow of imports (para.60).
- (v) The cereals deficit in 1975 in developing countries other than major cereal exporters would be more than double the 1961-63 level of 22 million tons on the low GDP assumption and moderately higher on the high GDP assumption (para.60).

^{1/} Paragraph numbers refer to Part I of Volume I of Agricultural Commodities Projections for 1975 and 1985 (CCP 67/3 Rev.).

^{2/} High and Low GDP assumptions are explained fully in Volume I of the Report, paras.27 to 34, including Table 2.

- (vi) In developed countries the present tendency for food production as a whole to run ahead of the growth of domestic demand was projected to continue. They had a capacity to increase output well beyond this level even to the point of supplying the projected deficits in 1975 of the developing countries, at least for cereals (para.61).

B. Trade in general

- (i) The net volume requirements of the high income zone ^{1/} for agricultural imports from low income countries would increase much more slowly in the period up to 1975 than in the 9 year period up to 1961-63, even with rapid economic growth in the importing zone (para.233). Thus, the outlook for the low income countries to expand their exports of agricultural products to the high income countries could not be regarded as very promising (para.234).
- (ii) Over the next 10 years the dynamic areas of import demand for many agricultural commodities, although still relatively small in absolute terms, would be the medium income countries of southern Europe, Japan and potentially (for tropical exports) U.S.S.R. and eastern Europe. In this period, but probably more so in the following decade, a number of developing countries could be expected to achieve medium income levels and also become areas of dynamic demand growth (para.238).
- (iii) There may be scope for a worthwhile expansion in trade in agricultural products among developing countries themselves (para.65). In the long run, the increases in demand for food and other agricultural products are projected to be much larger in the developing than in the high income countries and some of the additional demand could be met by supplies from developing exporting countries.

C. Trade outlook for tropical commodities (mainly coffee, cocoa, tea and bananas)

- (i) The import demand in the high income countries would not increase by much more than 2.3 percent a year (at constant prices) even on the high GDP assumption (para.252).
- (ii) Consumption in the U.S.S.R. and eastern Europe was still far below saturation and the rate of increase in import demand, although put at a substantially higher level than for other high income countries, might still have been underestimated (para.251).
- (iii) Without adequate corrective measures, exportable supplies could exceed demand at constant prices and world prices could therefore fall (para.253).

D. Trade outlook for commodities produced in temperate and tropical zones (mainly sugar and oilseeds, oils and fats)

- (i) On the assumptions of the projections, including the continuation of current policies, the net import demand (at constant prices) of the high income countries for competing products (which also include relatively small net imports of citrus fruits and tobacco) would actually decline from 1961-63 levels (para.256).

^{1/} Developed countries plus eastern Europe and the U.S.S.R.

- (ii) Gross exportable supplies of sugar could rise much more rapidly in developing countries than gross import requirements in all markets. If present trends continued, the burden of adjustment would fall on the exporting countries (para.260).
- (iii) Developing countries which export vegetable oilseeds and oils may have difficulty in finding sufficient markets over the period to 1975 (para.266).

E. Trade outlook for temperate zone commodities

- (i) Wheat - Prospects for commercial sales were difficult to assess in view of the projected decline in the import needs of developed countries and the uncertain outlook for demand from centrally planned countries (para.69).
- (ii) Coarse Grains - The projected increasing import requirements of developed countries could lead to a rapid expansion of trade although the rate of growth might fall short of the exceptionally high rate achieved in recent years (para.69).
- (iii) Dairy Products - The projected surplus of production over demand in the major dairy regions might be equivalent to around half of the volume of world trade in dairy products in 1961-63 (para.78).
- (iv) Meat - Import requirements for beef were projected to exceed the volume of exportable supplies and prices in world markets might therefore rise. A similar situation might occur in the case of mutton and lamb (para.85).
- (v) Commodities in Relatively Good Demand - For some commodities, notably meat, coarse grains and forest products, import demand in high income countries would be likely to show satisfactory rates of increase (para.64).

F. Trade outlook for agricultural raw materials and derived manufactures

- (i) The general indication given by the projections is for unfavorable markets for agricultural raw materials, due to either or both declining or stagnating volumes of net imports into the developed countries, or to downward pressures on prices, resulting from increasing competition from synthetics (para.270).
- (ii) For developing countries the expanding export sector in some cases is processed products rather than agricultural raw materials. The expansion of these exports would largely depend on the policies of importing countries as regards access to markets (para.272).

12. While many delegates had reservations on individual points, the Committee generally accepted the above main findings of the study, bearing in mind the limitations of the underlying data and methodology. It was felt that more precise figures would not yield substantially different conclusions. While most of these conclusions were not unexpected, the particular value of the study was that it provided, within a comprehensive and systematic framework, a quantitative expression of trends and problems.

3. Further work on projections

13. The Committee considered that commodity projections should continue to form part of the program of work of the Organization and that a new set of projections should be published in about three years' time. In the meantime, efforts should be continued with a view to developing an improved econometric base for this work, bearing in mind the recommendations of the Committee. At the same time, attention

should be given to the revision of the present projections and to the improvement of the basic data, taking full advantage of the opportunities of consulting commodity specialists in governments through the commodity study groups and similar bodies.

4. Trade issues and policies in relation to the Indicative World Plan

14. The Secretariat presented a progress report on the Indicative World Plan based on a background paper, C 67/15, which reviewed the scope and purpose of the Plan and indicated the present position of the work. It was stated that work was reasonably on schedule, and that by the end of April 1968 the text would have been prepared of a provisional world study and provisional regional studies for Asia and the Far East, Africa South of the Sahara, and South America. It was proposed to extend the studies to cover a number of other sub-regions during 1968 and the early part of 1969 and to revise the regional studies already made.

15. A main concern of the Committee in the IWP was trade in agricultural commodities. The Secretariat explained that the treatment of trade in the IWP was a very complex matter and that there remained unsolved problems as to how to handle it, particularly the extent to which it was necessary for the production, consumption, and trade analysis to be fully integrated and the means of actually doing so. The particular importance of trade was that it had the major integrating role in indicative planning. The Secretariat explained that it was intended to aggregate at the world level for each commodity taken separately, the "import requirements" and "export availabilities" for developing countries, derived from the IWP provisional targets of national production and demand for 1975 and 1985, along with similar estimates for high income countries derived from projections. In most cases the Secretariat expected that an imbalance would arise from such aggregation and that the trade issues of the IWP would be discussed in the light of these imbalances. These issues would be brought out more clearly when an attempt was made to reach a world balance of imports and exports for each commodity, by considering the implications of price changes and alternative policies. As the Committee noted at its Forty-First Session, this type of adjustment would find a place only in the first relatively complete version of the IWP to be presented to the FAO Conference in 1969.

16. The Committee recognized that the continuation of current trends and policies affecting the net import demand of high income countries would constitute one set of assumptions on which such balancing adjustments could be based. It would be important in the analysis to identify the exporting countries likely to be affected and the nature of the impact upon their development. In the light of the findings of the projections study (paragraph 11 above) the Committee felt that it would be acceptable for the Secretariat to undertake alternative balancing adjustments on the basis of assumed changes in policies, leading to a discussion of the alternative impact on the countries affected. The Committee noted that the Secretariat felt that it should be possible - with a good deal of caution and qualification - to undertake such adjustments at the level of world trade, that is, as between developing countries on the one hand and the developed and centrally planned countries on the other, but, the difficulties involved would seem to preclude carrying this adjustment down to individual countries. However, it would be possible to define progressively the major trade implications of indicative world agricultural development and the nature of the commodity policy and development choices facing many exporting countries.

17. In the course of the Committee's consideration of the areas of policy in which such alternatives might usefully be assessed from the viewpoint of their impact on world commodity trade, some delegates felt that the Secretariat should be guided by the principles established by UNCTAD. It was also suggested by various delegates that alternative assumptions should be discussed and assessed in fields such as those mentioned below.

18. Agricultural exports from developing to high income countries: Delegates from developing countries drew attention to the effects of obstacles of various kinds, such as tariffs and quotas, in high income countries in checking exports to these major markets. They drew particular attention to the limiting effect on trade of the discriminating import duties in some developed countries against processed products derived from agricultural raw materials. The question was raised as to whether it would be feasible for agricultural raw materials faced with competition from synthetics to be accorded preferential treatment in the markets of developed countries. It was pointed out by some delegations that the establishment of agreed understandings on a minimum share of consumption or consumption increase in developed countries to be provided by developing countries would greatly assist the economic development of the latter.
19. Exports from developed to developing countries: There was widespread agreement as to the need for continuing large-scale food aid as an interim measure until production in the developing countries caught up with their increasing requirements, or until the expansion of their foreign exchange earnings permitted them to purchase their import needs.
20. Trade among developing countries: The Committee agreed that since in the long run the most dynamic increases in demand for agricultural products would come from the developing countries themselves, there was scope for increased trade amongst these countries. The expansion was, in fact, already taking place at an appreciable rate. It was, nevertheless, difficult to assess the extent to which this potential increase was likely to be actually realized, and it would be important for the IWP to go into this question. There were many problems concerning payments arrangements and the establishment or improvement of the commercial infrastructure, as well as those arising from the competitive strength of export sectors in developed countries. It was noted that any sustained increase in trade among developing countries would require additional production since there would be no advantage in diverting supplies which could be sold in high income countries.
21. Trading arrangements: Many delegates felt that international commodity agreements, or less formal arrangements, could help some commodity situations. The need for effective control over production within the framework of such measures was pointed out by several delegates. The adverse effect of violently fluctuating commodity prices was also referred to. Another delegate noted the role that international arrangements could play in integrating commercial and non-commercial trade. The Committee felt that it would be useful for the IWP to take into account the potential role of integrated commodity arrangements, covering price, consumption and access, in promoting the orderly expansion of trade in commodities of special interest to developing countries.
22. Production in developing countries: The Committee agreed as to the great urgency for maximizing the efforts by developing countries to increase food and agricultural production. In some instances, the need to place relatively more emphasis on a better balance between the production of food for domestic consumption and traditional export crops may be considered. This question should be examined in the course of the analysis of alternative in the IWP.
23. Pricing policies: Attention was drawn to the importance of appropriate cost price relationships as a means of stimulating production in developing countries. A suggestion was made that the effects of different price assumptions for food commodities within developing countries, including the possible effect of price increases on the diet of particular income classes, might be investigated, perhaps in a few case studies.
24. Individual commodities: It was suggested that the use of alternative policy assumptions in the handling of trade in the IWP should be undertaken at both the general trade and the individual commodity trade levels. In coarse grains, for instance, what changes in national price supports or tariff duties would encourage developing countries with production possibilities for maize or sorghum to increase exports? Or with dairy products, what effects would changes in milk policies in highly industrialized countries have on butter trade, imports of tropical oils and on consumer prices?

25. Role of study groups: The Committee reaffirmed the decision taken at its Forty-First Session that the CCP study groups should review the commodity aspects of the regional studies and of the IWP as documents became available. Likewise, the Director-General was requested to invite independent commodity councils and study groups to undertake such reviews for their respective commodities.

5. Timetable for provisional 1968 version of IWP

26. The Committee emphasized the importance which it attached to the Conference and Council decisions that there should be the fullest possible consultation with governments in the course of the preparation of the IWP, including its review by the Committee.

27. Many delegates, therefore, considered it highly desirable that either Council or CCP should have the opportunity to review carefully the provisional IWP documents before they went to the Second World Food Congress. These delegates did not think it would be satisfactory for any comments which Council or CCP might make simply to be annexed to the documents. What was needed, in their opinion, was the revision, where necessary, of the provisional studies to take account of the comments of these bodies. They considered that although the documents might be labelled "provisional" for presentation to the Food Congress, it was inevitable that this provisional nature would often be overlooked by readers not fully informed as to the nature of the project and the importance of the qualifications which had always to be kept in mind. They therefore thought it vital to ensure that the first release of the IWP, even in a provisional form, consisted of adequate documents reviewed by the appropriate organs of FAO.

28. Some delegates considered that a progress report and a detailed synopsis would be more appropriate for presentation to the Food Congress. The contrary opinion, however, was also expressed, i.e. that mainly because the Second World Food Congress would not be competent to pass judgement on the Indicative Plan, the provisional documents would not need revision before being discussed by the Congress.

29. The representatives of the Director-General referred to earlier decisions of FAO bodies. The Twelfth Session of the FAO Conference had endorsed the request of the First World Food Congress that an Indicative World Plan for Agricultural Development be placed before the Second Congress. The Thirteenth Session of the FAO Conference had concurred with this procedure, while drawing attention to the fact that the World Food Congress would not constitute a body competent to pass judgement on the Indicative Plan. It was the FAO Conference which had the responsibility of reaching conclusions and making recommendations to governments. The FAO Council, at its Forty-Eighth Session, accepted the timetable outlined by the Director-General. According to this timetable, the provisional world document and four regional studies would be despatched to all FAO Member Governments about the end of June 1968. Since the Second World Food Congress was scheduled to take place in September 1968, the timing would allow the Council or CCP to review the provisional Indicative Plan documents before they were despatched to members of the Food Congress but would preclude revision of the documents in the light of the Council or CCP review. However, comments made by Council or CCP, as well as the provisional Plan documents, would be placed before Food Congress members.

30. The advantages of this procedure was pointed out by the representatives of the Director-General. It would be advantageous to the Second World Food Congress because the provisional Plan would provide a most valuable practical focus for its discussions. However, it would be even more valuable to FAO because the same documents would be the basis of discussions with governments and other bodies in the course of which ideas for improvement, better information and corrections could be expected. These would be reflected in the revisions which could then be made before the Plan went to the 1969 FAO Conference.

31. The Committee reaffirmed its judgement, as expressed at its Forty-First Session (CCP 67/20, paragraphs 63-64) that the preliminary 1968 version of the IWP would necessarily lack many details of a complete IWP but would contain broad suggestions of some possible policy implications and issues for discussion.

32. The Committee stressed the importance of a suitable timetable of work and inter-governmental consultations, as expressed in paragraph 12 of the report of the Forty-Eighth Session of the Council, and requested that its views on this matter be brought to the attention of the forthcoming Council and Conference sessions.

II. WORLD AGRICULTURAL COMMODITY SITUATION

1. Current trade position

33. The Committee reviewed the principal developments in the world agricultural commodity situation on the basis of information supplied in the FAO Commodity Review 1967 and the statements made by delegates.

34. The main findings were as follows: World exports for principal agricultural commodities in 1966 showed a modest rise of 4 percent in value terms. This was an improvement over 1965, but the growth rate was still below the average for the previous five years. Agricultural trade continued to grow more slowly than total world trade, and consequently there was a further fall in the share of agricultural commodities in the total. The gain in the agricultural export earnings went mainly to developed and centrally planned countries, while the combined exports from the developing countries and some developed countries fell back slightly.

35. It would appear that the aggregate value of agricultural trade in 1967 might decline for the first time in a decade, although the position for some commodities, such as cotton, had improved. Agricultural prices continued to decline for most of 1967. For agricultural products as a whole the average export unit value in the first three quarters of 1967 was 3 percent lower than in the corresponding period of 1966, with a particularly sharp fall for raw materials. This was due to the pressures of heavy supplies, as well as to the effect on imports of the slowing down of economic growth in some industrialized countries, but it also reflected specific factors affecting individual commodity markets.

36. These specific factors were both of a short- and longer-term character, associated with economic and structural changes, fortuitous fluctuations in output, and planned policies at national and international level. In particular, it was notable that some developing importing countries were unable to take advantage of favorable market opportunities, owing to difficulties in expanding output speedily or an inability to hold adequate stocks.

37. The Committee expressed serious concern at the continued decline in the terms of trade of primary producing exporting countries. This had particularly affected developing countries which are deficient in foodstuffs and which export tropical products and raw materials, but the decline also had an adverse impact on some developed primary producing countries.

38. The Review focussed attention on a number of commodities which had faced particularly severe problems in 1966. In the free market for sugar the longer-term effects of the tendency toward self-sufficiency in importing countries have been aggravated by the uncertainty caused by the failure so far to negotiate a new Sugar Agreement. Sugar prices fell in 1966 to their lowest level since 1941. While the consumption of natural rubber increased faster than production, there was a sharp fall in prices, due to more rapid stockpile releases and the emergence of deflationary tendencies in a number of developed countries. The fall in prices was accentuated in 1967, despite a reduction in the rate of stockpile releases. Production and trade in

hard fibers declined in 1966 for the second successive year. Prices fell sharply reflecting the generally heavy stock position in both producing and importing countries and the intensified competition from synthetics. The situation has remained serious in 1967. The growth of world output of fats and oils slackened considerably in 1966, and the developing countries were particularly affected by bad weather conditions. However, some expansion took place elsewhere, and this, with high levels of stocks in many producing countries, exerted a depressing influence on prices which caused serious concern. For rice, the problems were different with output in both importing and exporting countries growing too slowly in relation to demand. This, together with bad weather in several producing countries in 1966, caused a rise in consumer prices in both importing and exporting countries, as well as a pronounced increase in international prices. Wool consumption exceeded current production in 1966, giving rise to a modest recovery in prices in the first half of the year. This was soon reversed, however, as the coarser grades experienced greater competition from synthetics, and this together with the reduced demand in some of the major consuming countries led to a fall in prices.

39. Despite this generally unsatisfactory situation, the Committee was informed that some positive market factors had also become apparent. Rapid changes were occurring in the pattern of trade and production of some commodities. In particular, there had been a marked shift of the processing industries from the developed to developing exporting countries, especially for oilseeds, jute and cotton. Another important dynamic factor was the ability of the lower-cost developing exporters to obtain a larger share of the world market for some commodities, such as rubber, tea and rice. Moreover, the overall imports of certain food products into industrialized countries were showing a rapid and accelerating growth. It was notable that, as pointed out by one delegate, a few major developed countries were still able to increase their imports of agricultural commodities of particular interest to developing countries.

40. The Committee noted that the Secretariat intended to analyze, in greater depth, the recent trends and patterns of demand for imports into industrialized countries of certain agricultural products. This study would try to identify the main causes of the high growth rate achieved in imports of some food products and to examine how far developing countries could expect to share in future expansion.

41. The Committee also requested the Secretariat to make a more detailed analysis of the world forestry situation in future issues and, where possible, to provide more up-to-date statistics on forest products.

2. International action on commodity problems

42. The past year had been a period of intensive activity aimed at resolving international commodity problems. Some success had been achieved. The outstanding event was the conclusion of the GATT Kennedy Round which, for the first time, had attempted to integrate agriculture fully into the trade negotiations. This had resulted in agreement on higher minimum and maximum prices for wheat and a new international food aid scheme, which was subsequently embodied in the International Grains Arrangement, now open for signature. However, it had not proved possible to develop a new approach, as originally hoped, on the harmonization of national policies, the removal of non-tariff barriers, and the general problem of access to markets. Only limited gains were achieved in the Kennedy Round for temperate-zone products other than wheat and for tropical products of special interest to developing countries. As regards dairy products, the Committee was informed that further efforts were now being made by interested countries to resume the consideration of means of controlling the subsidization of exports and of channelling surpluses to food-deficient areas.

43. The difficulties met in resolving agricultural trade problems as part of the Kennedy Round underlined the practical advantages of a commodity-by-commodity approach. In this respect, the Committee welcomed the outcome of the preparatory talks on cocoa which raised hopes that the forthcoming international cocoa conference would be successful. Progress had been made in strengthening some aspects of the present Coffee Agreement and in considering proposals for the negotiation of a new Agreement.

44. The Committee placed high value on the practical work being carried out in its commodity study groups, and especially commended the informal arrangements which had been agreed under FAO auspices for stabilizing international prices of jute and hard fibers. There had also been useful talks on the technical feasibility of means of international co-operation in other recent commodity meetings, including those on rice, fats and oils, and tea.

45. Representatives of rubber producing countries informed the Committee of the outcome of the intergovernmental meeting of rubber producers, held in Kuala Lumpur in October 1967, which had drawn up important recommendations regarding the desirability of an international agreement, embracing both natural rubber and synthetic rubber, to establish world prices at remunerative levels. The Secretary-General of UNCTAD had now proposed an exploratory meeting on rubber. The Committee noted that the FAO Secretariat was co-operating closely with the international organizations concerned and hoped that it would give full support to UNCTAD and the International Rubber Study Group in any new initiatives in this field.

3. Regular review of medium-term food outlook

46. The Committee's attention was drawn to the need that had been expressed recently by a number of governments, particularly at the Forty-Third Session of the ECOSOC, for regular review of the medium-term food outlook. It noted that the Secretariat had started to consider ways in which such reviews might best be prepared (document CCP 67/3). This work would fill the gap now existing between the short-term outlook already provided by the State of Food and Agriculture and the FAO Commodity Review, and the longer-term picture of the direction and rate of change in the food situation given by the FAO Projections and the Indicative World Plan. Such reviews could serve several purposes, including the planning of technical assistance and other aid to agriculture, of production policies in exporting countries, and of food aid activities. They would also be useful in providing early warning of the emergence of possible trade and marketing problems.

47. The Secretariat pointed out that the procedures and content of the reviews would necessarily evolve as experience was gained with their preparation and use. It was evident, however, that the techniques required for them were likely to be different from those followed in preparing the Commodity Projections or the Indicative World Plan. They were likely to be of a more pragmatic nature, relying more on commodity expertise and knowledge of individual countries, rather than on elaborate statistical exercises. A number of important characteristics of the reviews still had to be decided, including the time period covered by them, which had to be short enough to be useful for operational purposes; the commodities included; and the way in which account would be taken of fluctuations in import demand caused by changes in stock levels and by random factors such as the weather. This latter requirement suggested that the reviews might best be presented in terms of a range corresponding to the possible downward and upward fluctuations from the trend or plan level. The reviews would be a Secretariat responsibility, but consultations would take place with governments of at least the major food deficit countries, with regard to the current trends, plans and prospects of their food production and their domestic policies affecting demand and supply. The work was likely to throw an additional responsibility on some of the study groups, especially those on Grains and Rice. The Secretariat hoped to initiate the work in the course of the 1968/69 biennium.

48. The Committee noted the Secretariat's intention to initiate such medium-term reviews and was informed that this work had no immediate budgetary implications. A number of delegates pointed out that the proposal did not constitute a new task for the Organization, but an extension of the outlook work currently carried out through, for instance, the Commodity Review, and they considered that the information currently made available to the Organization by governments would be useful for medium term reviews also. It was also pointed out by some delegates that a number of governments had already found the making of such forward appraisals a necessity for their own policy planning. The view was expressed that the commodity coverage of the reviews should be extended beyond the basic food crops, to cover also export crops and possibly the performance of the agricultural sector as a whole.

49. There was a consensus that, as had been recognized by the Secretariat, further thought would still have to be given to the methodology and practical procedures. The Committee agreed that a suitable first step might be the preparation of pilot reviews for the consideration of the Study Groups on Grains and Rice, possibly in a joint session, with a view to evolving appropriate methods and procedures. The findings of the Study Groups could be reviewed in due course by the CCP.

III. PREPARATIONS FOR THE SECOND UNITED NATIONS CONFERENCE ON TRADE AND DEVELOPMENT

50. The Committee was informed of recent developments in the UNCTAD bodies and of the preparations for the Second Session of the UN Conference on Trade and Development, scheduled to meet in February/March 1968 in New Delhi. The Committee noted that the co-operation extended by the FAO Secretariat to that of UNCTAD had been growing satisfactorily and gave its full support for the continuing participation of FAO in UNCTAD activities. It was suggested that in addition to documentation on the world food problem, the FAO Commodity Review and the projections study, the FAO Secretariat should make available to the Conference on Trade and Development a paper reproducing those parts of the report of the Fourteenth Session of the FAO Conference relating to items on the agenda of the UN Conference.

IV. INTER-AGENCY STUDY ON MULTILATERAL FOOD AID

51. On the basis of a Secretariat report (CCP 67/29) and other relevant documentation, the Committee reviewed the developments relevant to the inter-agency study on multilateral food aid which had taken place since its Forty-First Session, and the further work to be undertaken under the program of studies.

(a) Revision of Director-General's progress report to the CCP

52. The Committee welcomed the revision of the Director-General's progress report (CCP 67/13, Rev.1), the original version of which the Committee had reviewed at its Forty-First Session. The Committee agreed that the methodology and presentation of the quantitative estimation of food needs were greatly improved and considered that the Director-General's progress report provided an acceptable basis for further work on the inter-agency study on multilateral food aid. It was noted by the United States delegate that the estimates of the total cereal demand gap in 1975 contained in the report were roughly consistent with the corresponding estimates for 1980 prepared by his Government. The Committee noted that, on the basis of the material contained in the Director-General's report, the FAO Secretariat had co-operated actively with the United Nations, in consultation with other agencies, in the preparation of a progress report for submission to ECOSOC by the Secretary-General.

(b) ECOSOC discussion of the inter-agency study

53. In taking note of the Secretary-General's report, along with the revised version of the Director-General's progress report to the CCP, the ECOSOC at its Forty-Third Session in July-August 1967 had agreed with the report's diagnosis of the world food problem. It had recognized the gravity of the food situation in many developing countries. The long-term solution was to expand food output in these countries themselves, principally by their own efforts, but with assistance also from the developed countries, and in the context of general economic development. Nevertheless, there had been a consensus that the international community would be faced with the task of providing food aid for some years to come. The provision of food aid through multilateral channels offered a number of advantages and, although bilateral efforts were likely to remain important, all food aid efforts should be made in a co-ordinated manner. A mixed "cash and kind" program was thought by ECOSOC to be the most suitable approach, and it was generally felt that no new institution was required to administer expanded multilateral food aid. The ECOSOC had stated that it looked forward to the early completion of studies under General Assembly Resolution 2096 (XX). It had not, however, offered any specific guidance as to the priorities in this work, or with regard to the form of the final report on multilateral food aid.

(c) Role of food aid in efforts to solve the food problem of the developing countries

54. The Committee agreed that the contribution of food aid toward the solution of the food problem of food deficit developing countries was essential as an important interim measure, to tide these countries over until they could meet their food requirements either from expanded domestic output or through commercial imports. Several delegates said in this connection that food aid was to some extent an alternative to certain other policies, including those which facilitated the export trade of the developing countries so that they could earn the foreign exchange necessary to pay for food imports, and those facilitating the growth of food production in the food deficit countries. Some delegations, representing both aid giving and aid receiving nations, stressed the importance for the latter purpose of aid in the form of production requisites, such as fertilizers, pesticides and farm machinery.

55. Some delegations pointed out that even countries which may have reached self-sufficiency in the basic foodstuffs might still be deficient with regard to protein foods, for which there could thus be a continuing food aid need. It was also pointed out that normally self-sufficient countries could also be subject to crop failures due to bad weather, so that provision for emergency food aid would still be needed. As at the Forty-First Session, some delegates maintained that under an expanded multilateral program the distribution of food aid should be related to the requirements of particular countries. In the event that total resources should fall short of total requirements, the sacrifice should be distributed equitably among all the affected countries.

(d) Institutional arrangements for multilateral food aids

56. The Committee was unanimous in emphasizing the need to utilize to the greatest possible extent the existing institutions in implementing any expansion of multilateral food aid operations, in particular FAO and WFP, but also other international agencies. It welcomed the stress on this aspect that had been given in both the Secretary-General's progress report to ECOSOC and in the Director-General's progress report to CCP. Attention was drawn in this connection to the concern expressed recently by the Chairman of the Development Assistance Committee of the OECD regarding the proliferation of multilateral aid agencies.

57. The Committee emphasized strongly the importance of proper and efficient co-ordination of aid activities, not only between bilateral and multilateral food aid operations, but with respect to all efforts to solve the world food problem. Again, the emphasis that had been given to this in the two progress reports was welcomed. FAO had important functions to perform in this regard. For instance, some delegates suggested that FAO should not only study the food needs of the food deficit developing countries, but also act as a central point for assembling, analyzing and distributing information concerning food aid operations, both bilateral and multilateral. Others suggested that FAO should provide guidance for an inter-agency approach to food aid activities within the United Nations system. Attention was drawn in this context to the sections in the Director-General's progress report dealing with the need for a new policy framework for the solution of the world food problem (document CCP 67/13, Rev. 1, paragraphs 22-28) as deserving further study by governments.

58. The Committee welcomed the Food Aid Convention that had been included in the International Grains Arrangement 1967, which was currently open for ratification by governments. Although some countries were disappointed with the amount of grain aid that was to be provided under the Convention, 4.5 million tons a year, and with the limited extent of multilateralization of food aid that it had been possible to negotiate, it was nevertheless recognized that the Food Aid Convention was an important development in the history of food aid, and constituted a significant step forward. Thus, for the first time, agreement had been reached on an important provision on food aid as part of an international commodity arrangement. Aside from humanitarian objectives, the Food Aid Convention also met certain economic and commercial objectives by contributing to the stabilization of an important commodity market.

59. It was recognized, however, that the new food aid provision did not eliminate the gap between commitments and probable food needs. It had also created problems of co-ordination which were likely to require early attention. In the meantime preliminary discussions had been held in the Intergovernmental Committee of the WFP on the possible role of the WFP in relation to the Food Aid Convention. In the light of these developments, the time had come to try to narrow down the choice of institutional alternatives for multilateral food aid beyond what had been done in Chapter III of the Director-General's progress report. It was therefore suggested that the Director-General of FAO and the Secretary-General should prepare a revised analysis of institutional arrangements. Such arrangements should provide for a satisfactory integration of food aid with total aid in the context of promoting development. There was a need to co-ordinate the food aid related efforts within the spectrum of the United Nations system, the OECD and other organs concerned, and in the opinion of some delegates this would

require a body broadly representative of both the aid giving and aid receiving countries, and with direct access to all relevant information on agricultural policies, development programs and aid policies.

60. Some countries expressed disappointment that no progress had been made with regard to arrangements for other commodities in the course of the Kennedy Round of trade negotiations, where the basic lines of the International Grains Arrangement had been agreed upon. No agreements had been reached for dairy products, meat, and fats and oils. One delegate, representing a major dairy exporting country, drew attention in this connection to the need for an international approach to food aid to take account of the position of traditional exporters of foodstuffs, and indicated that his country had been sounding out other dairy exporting countries with a view to possible action directed toward the conclusion of an international arrangement designed to ease the pressure of supplies in world markets for dairy products, and to make available food aid supplies.

(e) Further work

61. The Committee felt that there was urgent need to continue the inter-agency program of studies, including the examination of some of the fundamental aspects of food aid, such as its effectiveness as compared with other types of aid and its possible influence on the availability of total supplies of aid. The hope was also expressed that the final report of the Secretary-General to ECOSOC would delineate the functions and responsibilities within the international system essential to an effectively co-ordinated approach to the food problem.

62. The Committee agreed, in addition to placing emphasis upon the further examination of the institutional aspects of multilateral food aid (see above), that, as suggested by the Secretariat, further quantitative examination of food needs for various purposes could be postponed. These estimates could in any case be only approximate, and their broad magnitude was now well understood. It was therefore more appropriate to put the emphasis on ways in which these requirements could be met. The views of the delegates differed as to the relative priority that should be given to the various subjects that had been suggested by the Secretariat. Most of the topics were closely related, and most deserved early attention. The importance of examining the extent to which, and the conditions under which, different groups of countries might be able to contribute supplies needed for food aid was emphasized by some delegates. Other delegates singled out for special attention the question of methods of safeguarding the domestic agriculture in the recipient countries against harmful impacts of large-scale food aid. Another suggestion was that priority should be given to the study of the technical and economic feasibility of diverting skim milk from use as animal feed in developed countries into food uses in developing countries. Somewhat lower priority was suggested for the examination of the experience gained under large-scale bilateral food aid programs.

V. REVIEW OF ACTIVITIES OF COMMODITY STUDY GROUPS AND OTHER SPECIAL COMMODITY MATTERS

1. Grains

63. The Committee reviewed the Report of the Eleventh Session of the Study Group on Grains which had been held from 26 to 30 June in Rome. This session had been mainly devoted to a survey of the world grains situation and short-term prospects. It also made a detailed appraisal of the FAO grain projections to 1975, and considered that these were reasonable on the assumptions made and that they presented a balanced assessment of the long-term outlook.

64. The Committee agreed that the Group was firmly established as a forum for the periodic review of the world supply/demand situation and outlook, and was particularly useful for countries predominantly interested in coarse grains. The Committee continued to regard the exchange of information on national and regional policies as a valuable contribution to the understanding of trends in world trade. It was noted that a short overlap of the next sessions of the Study Groups on Grains and Rice was envisaged, so as to enable them to consider jointly the methods and procedures to be employed in the proposed regular reviews of the medium-term outlook. This would imply that the Twelfth Session of the Study Group on Grains would be scheduled to be held in Rome immediately following the Twelfth Session of the Study Group on Rice, in May 1968.

2. Rice

65. The Committee considered the report of the Eleventh Session of the Study Group on Rice which was held in July 1967 at FAO Headquarters, Rome. The Committee noted that the continued interest of member governments in the work of the Study Group was demonstrated by the presence at this Session of a number of senior government officials and individuals in charge of national rice organizations. In accordance with the request of the Committee, the Group undertook a full assessment of the rice projections. It concluded that in general the projections and expectations concerning rice trade were reasonable on the assumptions made. The Group had pointed to the necessity to keep the projections under continuing review, especially to reflect the progress that might be achieved in the spread of the high yielding rice varieties that were now being introduced in several developing countries. Member governments had been requested to supply all information that would be helpful in assessing the impact of these programs.

66. The Group had also held a further exchange of views on the feasibility of possible international arrangements for expanding trade in rice. While there was a general consensus favoring the aims of increasing and stabilizing international trade in rice, the more conventional commodity agreement approach might not be fully applicable to the rice trade problems. On the other hand, none of the other suggested arrangements which had been examined by the Group was found to be generally acceptable to all governments at this stage. The Committee noted that the Group had asked the Secretariat to examine, in consultation with the UN Regional Commissions, studies which had been carried out on ways of expanding intra-regional trade in general, and specifically that relating to rice.

67. One delegate from a rice producing and exporting country drew attention to the Group's work in this field and expressed his Government's interest in the possibilities of encouraging intra-regional trade through bilateral contracts. He also stated that his Government favored the creation of an international rice financing fund to facilitate trade between developing countries and also to help in increasing rice production in developing countries.

68. The Committee took note that the Group, after examining possible alternatives, favored the continuation of the present organization of work and would continue to meet regularly once a year.

3. Oilseeds, oils and fats

69. The Committee received the report of the Second Session of the Study Group on Oilseeds, Oils and Fats. At this Session, the Group's main task had been to review urgently the special problems affecting vegetable oils and oilseeds and to make recommendations.

70. The Committee recognized the seriousness and urgency of the problems facing developing countries, many of which depend for a very substantial part of their total foreign exchange earnings on exports of these products. It accordingly expressed satisfaction with the progress that had been achieved at the Second Session of the Group which represented a major step forward in terms of international co-operation on

these commodities. The Committee noted in particular that the Group had identified and agreed on the nature of the main causes for concern; that it had developed a general consensus of opinion about objectives for action and had considered in a preliminary way a number of possible measures for alleviating the problems and achieving the objectives.

71. The Committee also welcomed the Group's decision to set up a Technical Working Party, to be serviced jointly by FAO and UNCTAD, to pursue the matter further and report to the Group, if possible not later than February 1968. In view of the importance of the technical and economic aspects of the task entrusted to the Working Party, the Committee expressed the view that major interested governments should ensure that they were represented by the best available technical experts.

72. The Committee noted that in order to assist the Technical Working Party in its task the Group had requested the Secretariat to prepare a working paper on the technical and economic aspects of various solutions with special reference to the problems of developing exporting countries and the feasibility of possible international measures. The Committee welcomed the information provided by the Secretariat that immediately following the Second Session of the Group, high priority had been given to this work. It noted that the aim was to complete the paper in time for due consideration by governments prior to the meeting of the Technical Working Party scheduled to begin on 5 February 1968. The Working Party session would be followed immediately by the Third Session of the Study Group on 11 and 12 February, so that the report of the Third Session could be available at the Second United Nations Conference on Trade and Development in New Delhi along with the report of the Group's Second Session. This schedule had been worked out in consultation with the Secretary-General of UNCTAD.

73. The Secretariat outlined the general approach to be adopted in the paper which was still in a formative stage, and indicated that additional advice from governments about its form and content would be extremely useful. The Committee was in general agreement with the approach outlined. The Committee appreciated that, bearing in mind the serious and complex nature of the problems involved and the need for adequate preparation, the time available to the Secretariat for completing the paper was very short. On the other hand, it felt that the seriousness and complexity of the problems underlined the need to seek solutions as a matter of urgency.

4. Hard fibers

74. The Committee took note of the Report of the Second Session of the Study Group on Hard Fibers, held in Rome in September 1967, and welcomed the step forward in international co-operation for this group of fibers initiated at that session. The Study Group had reached agreement on: (i) an informal indicative range for international export prices of sisal, to be reached by stages from the current low levels; and (ii) an informal system of export quotas for sisal and henequen and their manufactures, allocated by producing countries among themselves in such a way as to meet importing countries' estimated requirements in 1968 to the full.

75. In order to carry these arrangements into the future, and to consider any adjustment which might prove necessary, a Consultative Sub-Committee on Hard Fibers had been set up, a decision which recognized the value of the type of informal commodity arrangement which has been developed over the past few years in the Consultative Committee on Jute, Kenaf and Allied Fibers. It had been agreed that the Sub-Committee on Hard Fibers should normally meet twice a year.

76. The Committee commended the Study Group for its valuable work, and in particular for the realism shown by producing countries in the current difficult market situation. It welcomed the information that world prices of sisal had risen some 10 percent since the meeting of the Study Group.

77. With regard to the longer-term future, the study by the Secretariat of synthetic competition was of great importance. It was stressed that there was an urgent need to examine all possibilities which could lead to a solution of the problems of the hard fibers market. These might include study of the possibilities of diversifying hard fiber production in certain areas, as well as the further development of work on research into non-traditional uses, e.g. pulping for paper, and on improved grading, quality control and trade promotion and marketing. It was, however, emphasized that it would be difficult in the long run for the producing countries alone to carry the whole burden of adjustment in the hard fibers market, particularly in view of the far reaching social and economic significance of sisal, and the difficulties of diversifying production, in many of the main producing regions of the world.

5. Jute, kenaf and allied fibers

78. The CCP noted that the postponed Fourth Session of the Consultative Committee on Jute, Kenaf and Allied Fibers had been held in Rome in September 1967, with highly qualified representation from all sides of the jute and kenaf industry. The CCP welcomed the renewal, after a year's interruption, of international co-operation in this group of commodities, as constituted by the understanding between producers and consumers at the Fourth Session of the Consultative Committee to maintain an agreed indicative world export price range for raw jute in the 1967/68 season.

79. The CCP also noted that the Consultative Committee on Jute, Kenaf and Allied Fibers had concluded that it continued to require two meetings per year in the light of conditions on the world jute market and the new perspectives which had emerged at the Consultative Committee's Fourth Session for international co-operation in this group of fibers.

6. Bananas

80. The Committee reviewed the report of the Second Session of the Study Group on Bananas held in the Canary Islands, Spain, from 9-17 October 1967. It noted with satisfaction the large attendance at the meeting and the range of work covered and, in doing so, expressed its gratitude to the Government of Spain for the excellent arrangements made for the meeting.

81. Many delegates emphasized that the meeting marked a clear step forward toward a fuller understanding of the problems confronting the world banana economy and, in particular, with regard to the important and complex question of market access. It noted that a compromise had been achieved which involved substantial concessions both by countries favoring free trade in bananas and by those for whom the continuation of preferential treatment was essential for the survival of their banana industries and the economic and social advancement of their countries.

82. The Committee noted that the strong growth in consumption in importing countries in the past two years, was largely due to technical advances, the main impact of which had by now been felt and also that it had taken place at lower prices. Furthermore, current information pointed to the conclusion that, if present planting programs were realized, the rate of expansion in exportable supplies was likely to be greater than the growth of effective import demand at current prices. It was essential that producing countries should have the best available information on the market outlook in order to assess realistically their development plans and investment programs. The Committee therefore approved the decision of the Study Group to establish a Committee on Statistics for the purpose of fulfilling the above objectives.

83. The Committee approved the work program adopted by the Study Group, including a comprehensive study on all aspects of banana production, trade and consumption with special attention being given to the organizational structure and the cost of marketing and processing. It also approved the Group's recommendation to explore the possibility of developing new uses for bananas.

7. Rubber

84. The CCP was informed of the decision taken at the Nineteenth Session of the International Rubber Study Group in Sao Paulo, Brazil, to establish a Consultative Committee on Rubber, comprising producers of both natural and synthetic rubbers. It noted that this Consultative Committee represented an extension of the principles of informal consultation and co-operation developed under the CCP's auspices for jute and kenaf and for hard fibers, and hoped that its establishment and early convening would be of assistance in finding solutions to the difficult problems currently facing the world rubber market. It welcomed the provision made in the International Rubber Study Group's report for the FAO Secretariat to participate in the work of the Consultative Committee on Rubber.

8. Sugar and cocoa

85. The Committee heard a report by the Secretariat on recent developments in inter-governmental consultations with respect to the negotiation of international agreements for sugar and cocoa being conducted under the auspices of UNCTAD. The Committee noted with appreciation that in all aspects of the preparatory work, policy discussions and negotiations, there had been complete and constant co-operation between UNCTAD and FAO. In the case of sugar, the heavy burden of servicing the various international meetings had been shared through the establishment by the Secretary-General of UNCTAD of a joint Secretariat consisting of UNCTAD, FAO and the International Sugar Council. With regard to cocoa, in addition to joint staff work, there had been close working relationships between committees of FAO and UNCTAD; for instance, a number of technical issues had been referred by the UNCTAD Cocoa Consultations to the Committee on Statistics of the Cocoa Study Group.

VI. ARRANGEMENTS FOR THE FORTY-THIRD SESSION OF THE COMMITTEE

86. The Committee decided to hold its Forty-Third Session in the second half of 1968 at FAO Headquarters, the exact date to be determined by the Director-General, in consultation with the Chairman of CCP, bearing in mind the need to give governments adequate time to study the documents on the Indicative World Plan which the Secretariat expected to distribute to FAO Member Nations by the end of June 1968 and the date of the Second World Food Congress, now planned to be held in September 1968.

87. The Committee drew up its draft provisional agenda as follows:

- I. Review of the world agricultural commodity situation, problems and policies
- II. Commodity projections and Indicative World Plan for Agricultural Development
- III. Results of the Second UNCTAD Conference
- IV. Matters relating to food aid
 1. Report of the Consultative Sub-Committee on Surplus Disposal
 2. Report on World Food Program activities
 3. Inter-agency study on multilateral food aid
- V. Review of activities of commodity study groups and other special commodity matters
- VI. Arrangements for the Forty-Fourth Session of the Committee
- VII. Other business

VII. MATTERS REQUIRING THE ATTENTION OF THE COUNCIL

88. The Committee wished to bring the following matters in particular to the attention of the Council:

- (a) its summary of the main findings of the commodity projections (paragraph 11);
- (b) its discussion on the preparation of the IWP (paragraphs 14-25);
- (c) its concern that the CCP should have an opportunity to examine and comment on the preliminary version of the Plan before its presentation to the Second World Food Congress (paragraphs 26-32);
- (d) its discussion on the inter-agency study on multilateral food aid (paragraphs 51-62).

APPENDIX

LIST OF MEMBER NATIONS AND INTERNATIONAL ORGANIZATIONS
REPRESENTED AT THE FORTY-SECOND SESSION OF THE COMMITTEE

First Vice-Chairman (Acting Chairman of this Session): Miss Irene Haas
(Federal Republic of Germany)
Vice-Chairman of this Session: Mr. Ram Saran (India)

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GUATEMALA

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OBSERVER COUNTRIES (cont'd)

HUNGARY

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Ambassador
Ministry of Foreign Affairs
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INDONESIA

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Foreign Economic Relations
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Djakarta

IRAQ

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Director-General of Agriculture
Baghdad

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Ministre Plénipotentiaire
(Affaires Agricoles)
Représentant Permanent d'Israël
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Ambassade d'Israël
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OBSERVER COUNTRIES (cont'd)

IVORY COAST

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Kingston

JORDAN

Salah Juma
Director-General
Department of Forest
Amman

LAOS

Tiao Somsavath Vongkoth
Directeur de l'Agriculture
Vientiane

LEBANON

M. Basbous
Président du Plan Vert
Bejrout

MALTA

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Counsellor (Agriculture)
Resident Representative to FAO
Embassy of Malta
Rome

NICARAGUA

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Vice-Ministro de Relaciones Exteriores
Ministerio de Relaciones Exteriores
Managua

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Embajada de Nicaragua
Roma

F. Sándigo Sándigo
Secretario
Embajada de Nicaragua
Roma

POLAND

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Ministry of Foreign Trade
Warsaw

S. Hagel
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OBSERVER COUNTRIES (cont'd)

POLAND (cont'd)

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Committee of Economic Co-operation
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Warsaw

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Director of Department
Ministry of Agriculture
Warsaw

SOMALI REPUBLIC

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Ministry of Agriculture and Co-operatives
Dar-es-Salaam

OBSERVER COUNTRIES (cont'd)

TUNISIE

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Chef de la Section Nutrition
Ministère de l'Agriculture
Tunis

TURKEY

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Conseiller commercial
Ambassade de Turquie
Rome

VIET-NAM, Rep. of

Dinh-van-Phung
Director de l'Agriculture
Saigon

Nguyen Thanh Huy
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Représentant Permanent Suppléant
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YUGOSLAVIA

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Secrétariat fédéral de l'Economie
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INTERNATIONAL ORGANIZATIONS

(i) Intergovernmental

COMMONWEALTH SECRETARIAT

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London

EUROPEAN COMMUNITIES

G.V. Dal Pero Bertini
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Direction générale de l'Agriculture
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F. De Benedictis
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Générale Aide au Développement
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INTERNATIONAL ORGANIZATIONS (cont'd)

(i) Intergovernmental (cont'd)

EUROPEAN COMMUNITIES (cont'd)

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Administrateur Principal
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P. Taliani de Marchi
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Secrétariat du Conseil
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GENERAL AGREEMENT ON TARIFFS AND TRADE

H. Van Tuinen
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Geneva

INTERNATIONAL ORGANIZATIONS (cont'd)

(i) Intergovernmental (cont'd)

INTERNATIONAL LABOUR ORGANIZATION

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ORGANIZATION OF AMERICAN STATES

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European Office of the OAS
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(ii) Non-governmental

INTERNATIONAL CHAMBER OF COMMERCE

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Confédération générale de
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Rome

P. Vannicola
Confédération générale de
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Rome

INTERNATIONAL DAIRY COMMITTEE

E. Strauss
Secretary
Thames Ditton, Surrey

INTERNATIONAL ORGANIZATIONS (cont'd)

(i) Intergovernmental (cont'd)

ORGANIZATION FOR ECONOMIC
CO-OPERATION AND DEVELOPMENT

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UNITED NATIONS and UNCTAD

V. Kutuzov
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(ii) Non-governmental (cont'd)

INTERNATIONAL FEDERATION
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INTERNATIONAL WOOL
TEXTILE ORGANIZATION

R. Dodi
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