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Sixty-Seventh Session

Rome, 3 - 7 November 1975

REPORT OF THE SIXTIETH SESSION OF THE COMMITTEE ON COMMODITY PROBLEMS

Rome, 13-23 October 1975

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The full report is circulated herewith.

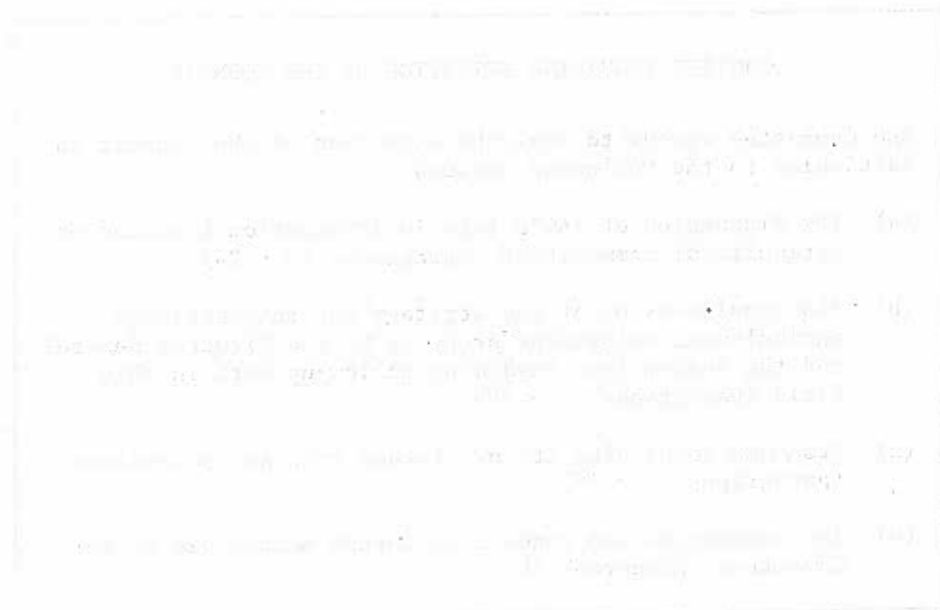
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MATTERS REQUIRING ATTENTION BY THE COUNCIL

The Committee wishes to draw the attention of the Council in particular to the following matters:

- (a) Its discussion of FAO's role in international action on agricultural commodities (paragraphs 12 - 24)
- (b) Its consideration of the strategy for international agricultural adjustment proposed by the Director-General and the suggestions regarding follow-up work in this field (paragraphs 25 - 29)
- (c) Its views concerning its own future role and activities (paragraphs 39 - 49)
- (d) Its recommendation concerning future membership of the Committee (paragraph 50)

INTRODUCTION

1. The Committee on Commodity Problems held its Fiftieth Session from 13 to 24 October 1975 at FAO Headquarters, Rome. The session was attended by 57 Members of the Committee, by observers from 14 other FAO Member Nations, and by representatives of the European Economic Community, the United Nations and its Specialized Agencies, and 13 international organizations. The list of participants is given in Appendix B.
2. The session was presided by Mr. G.H. Janton (France), Chairman, assisted by Mr. Salahuddin Ahmed (Bangladesh), First Vice-Chairman.
3. The Committee adopted the agenda reproduced in Appendix A.
4. The Committee was assisted during the session by a drafting committee composed of the delegations of Australia, Brazil, France, India, Indonesia, Japan, Kenya, Mexico, Poland, United Kingdom, and the United States of America, under the chairmanship of Mr. A. Ismet Hakim (Indonesia).
5. The session began with an address by the Director-General of FAO, Dr. A.H. Boerma. Referring to the world food situation, and to the cereals situation in particular, he welcomed the improvement in supplies which took place in the Far East, but noted that elsewhere there was little change from the previous year.
6. He pointed out that the Fiftieth Session of the CCP was being held at a very crucial time since it followed the World Food Conference and the Seventh Special Session of the United Nations General Assembly at which a consensus had been achieved on the major issues facing the world and on the broad approach that should govern negotiations on these issues, and preceded the Fourth United Nations Conference on Trade and Development.
7. He noted that the agenda of the session was well designed to provide the Committee with opportunities to review the useful progress recently achieved in other bodies and to develop a fuller and more effective contribution to further work. This contribution should be a continuation of the Committee's recent activities but in a more problem-oriented and policy-gearred context, leading to action recommendations to the FAO Council, the FAO Conference, the World Food Council and other bodies.
8. The Representative of UNCTAD pointed out that the present session of the Committee was taking place at a time when the world community appeared to be moving into a more positive phase of effective international action on commodities. The Committee would no doubt concentrate on those recommendations of Resolution 3362 (S-VII) of the Seventh Special Session of the UN General Assembly which had a direct bearing on trade in commodities and on food and agriculture in general. The UNCTAD Representative then clarified the relationships between the decisions by the General Assembly and the Integrated Programme for Commodities initiated by UNCTAD and called attention to the complementarity between the UNCTAD programme and the work on commodities developed and proposed in FAO. He expressed his appreciation and that of the Secretary General of UNCTAD for the understanding and support UNCTAD was receiving from FAO.
9. The Representative of GATT informed the Committee on the progress in the negotiations on agricultural products within the framework of the Multilateral Trade Negotiations. The Trade Negotiations Committee had established in February 1975 six negotiating groups, including inter-alia one on agriculture and another on tropical products. The group on agriculture had established sub-groups for grains, meat and dairy products. The group had emphasized the importance of differential measures which would provide more favourable treatment for the developing countries. The group on tropical products had already adopted guidelines for the negotiations on products falling within its terms of reference.
10. The Committee also heard a statement by the Representative of the International Wheat Council on the preparatory group under way on the possible bases for the new international wheat agreement. The Representative of the OECD reported on work on his Organization on commodities and on relations with developing countries.
11. The Committee adopted separately and in advance the part of its report dealing with Item II, 1 and 2 in order to facilitate consideration by governments in good time before the sessions of the FAO Council and the FAO Conference.

I. INTERNATIONAL ACTION RELATING TO AGRICULTURAL COMMODITIES

1. FAO's Role in International Action on Agricultural Commodities

12. The Committee had before it a document (CCP 75/20) outlining the Director-General's proposal to the forthcoming Conference for a comprehensive strategy for agricultural commodities, conceived as part of the follow-up to the World Food Conference and as FAO's contribution to the implementation of Resolution No. 3202(S-VI) of the 6th Special Session of the UN General Assembly on the Programme of Action on the Establishment of a New International Economic Order and to the Fourth United Nations Conference on Trade and Development.

13. Basically, the paper was designed to set out how FAO could reinforce the approaches of other organizations in the area of commodity trade and development, as well as the proposals embodied in UNCTAD's Integrated Programme for Commodities. The general intention was to concentrate attention on those products of export interest to developing countries which in the Secretariat's view needed action in addition to various proposals for international buffer stocks and other price supporting and stabilization arrangements, including those commodities which are not storeable (such as bananas and citrus fruits) those suffering from structural oversupply (such as tea and bananas), those suffering from the competition of synthetics (e.g. jute, hard fibres, cotton, rubber), and those competing with products of developed countries (e.g. fats and oils and sugar). In particular, the intention was to identify commodities which belong to these categories and to propose a wide-ranging "package" of measures for each of them in the fields of investment, trade, aid and technology.

14. The ultimate objective of the proposal was to enable developing countries, and particularly the most seriously effected countries to take fuller advantage in the field of commodities of their potential for production for export, and also of the new market opportunities that would be opened to them when the current commodity negotiations in UNCTAD, GATT and in other international fora were concluded.

15. In order to achieve these objectives, the Secretariat document suggested that FAO should prepare a strategy which would provide for:

- (1) a variety of policy instruments for dealing with commodity problems of developing countries, taking full account of the special technical and economic requirements of particular products, and individual exporting countries;
- (2) direct means of helping the most needy among the developing exporting countries of individual commodities through extra compensatory measures to assist their balance of payments problems and structural changes in their economies;
- (3) specific problems orientation, in that the strategy would be meeting an internationally agreed list of most serious and urgent commodity issues of interest to developing countries
- (4) an order of priorities between various commodities with claims on international financing, between different policy objectives to be pursued with particular urgency, and between various policy instruments most likely to achieve the required objectives;
- (5) a definite time horizon for its entire implementation, e.g. the next decade up to 1985, with shorter deadlines for implementation of its specific components; and
- (6) mobilization of adequate resources through cooperative arrangements between industrialized and developing countries, possibly by extending the principles of the Lomé Convention to other commodities and by widening the participation of both developed and developing countries.

16. The Representative of UNCTAD informed the Committee of the background to the development of the Integrated Programme and stressed that it was a multi-dimensional approach to the problems of a wide range of commodities. At the same time, he indicated that there were questions which clearly fell outside the scope of the proposed integrated programme: in particular, with reference to commodities which were not internationally traded and with regard to production and productivity questions generally, to the extent that these questions called for national action or fell outside the sphere of international trade and development policy. In UNCTAD's view, there was no fundamental difference in objectives and principles between FAO's proposed strategy for agricultural commodities and the UNCTAD's integrated programme. The practical difference between the two approaches was in the fact that the UNCTAD programme was one for intergovernmental negotiations, based on a set of specific inter-related proposals whereas, in the main, the Director-General's proposal was for a longer-term strategy of action on agricultural commodities. The two approaches were complementary and in no sense competitive. The Secretary-General of UNCTAD welcomed the full support of FAO in carrying out the work ahead on the integrated programme.

17. The Committee was fully aware of the serious nature of the commodity problems facing developing countries, especially in the field of food and agriculture, and recognized the urgent need for finding early solutions to these problems which would be satisfactory to all the countries involved. The problems of developing countries had been causing increasing concern among governments, as was shown by recent developments in international fora, particularly by the World Food Conference and the Sixth and Seventh Special Sessions of the UN General Assembly. The Committee considered that these new policy initiatives being taken in these fora could contribute significantly to the creation of agreement in areas where none had seemed possible before, and that in moving towards that objective governments should make full use of FAO's expertise in food and agriculture.

18. The Committee was of the opinion that the commodity problems of developing countries should be viewed in a world context, and solutions sought in a climate of consensus and understanding. It recognized that the Secretariat document constituted a contribution to the progress of international cooperation in the field of agricultural commodities, and that it complemented ongoing work in other international organizations, notably in UNCTAD. It was recognized that FAO should complement the work of UNCTAD concerning an overall integrated programme for commodities. In this connexion, various suggestions were made by various delegates, including:

- (a) extending the coverage to a larger number of commodities;
- (b) providing assistance required by developing countries for increased production and improved productivity, processing, research and development and access to markets;
- (c) work on resolving the special structural problems of certain commodities where a multi-disciplinary approach was essential.
- (d) helping to coordinate or harmonize national production policies through the strategy for international agricultural adjustment.

The Committee therefore suggested that the Director-General should arrange, in consultation with the Secretary-General of UNCTAD, for the Organization's commodity and technical expertise in the field of food and agriculture to contribute to the fullest possible extent to the further elaboration of the UNCTAD proposals for an integrated programme for commodities.

19. While some delegates were in favour of giving their full endorsement to the Director-General's proposal as they stood, some were only able to endorse them in principle, some reserved their position, and some opposed endorsement. A number of delegates considered that such an endorsement was premature in view of the general character of the proposals, of the timing of the Fiftieth Session of CCP between the Seventh Special Session of the UN General Assembly and the Fourth Session of the United Nations Conference on Trade and Development, and of the need to elaborate further the proposed comprehensive strategy so as to ensure that its implementation would contribute to the progress of work undertaken in other international fora.

20. At the same time, there was general recognition that it would be useful to provide for the consideration of governments longer-term policy guidelines and specific policy proposals complementing initiatives taken in other international fora, in order to assist them in implementing the decisions and recommendations of the World Food Conference and the UN General Assembly in the field of agricultural commodity trade and development. It was also generally agreed that FAO's contribution should be viewed in the context of the new global perspectives, and that the Organization's inter-disciplinary expertise in food and agriculture should be utilized.

21. In this connection, several delegates accepted the three main fields suggested below by the Secretariat while others stated that they were not yet in a position to make a decision.

- (a) intergovernmental consultations with a view to testing new ideas and prenegotiating, in the CCP and its intergovernmental commodity groups, possible action proposals, including financing schemes and arrangements - formal and informal - to implement the new policies;
- (b) international commodity analysis to provide a firm basis for the forward planning of supplies so as to promote international agricultural adjustment and a better balance between production and consumption, which are necessary for the effective functioning of international commodity agreements; and
- (c) identification and mobilization of technical and economic assistance to interested developing countries in formulating and implementing their commodity production and trade policies and programmes including export diversification programming, and improved marketing structures and processing industries.

22. The Committee also recognized that, though Document CCP 75/20 had been prepared before the Seventh Special Session of the United Nations General Assembly and could not therefore reflect its conclusions, it took account of the various preparatory elements and developments, culminating in the decisions reached at the Session. Its objectives were therefore in line with those contained in the Special Session's Resolution on Development and International Economic Cooperation, and especially those calling for intensification of efforts in favour of the developing countries towards expanding and diversifying their trade and productive capacity, improving their productivity, increasing their export earnings, and improving competitiveness with synthetics of non-food agricultural products.

23. The Committee agreed that the proposals contained in Document CCP 75/20 provided a useful starting point for further elaboration and discussion. The Committee suggested that the Director-General should draw up, for consideration at the Fifty-First Session of the Committee, specific action proposals designed to solve the main problems of commodities of major export interest to developing countries in the framework of resolutions adopted by the Seventh Special Session of the General Assembly, indicating as far as possible broad priorities between various policy objectives and policy measures for individual commodities and estimates of the time sequence for implementation of the various options for action proposed, as well as the type of resources and technical assistance required. In undertaking this work, the Secretariat should concentrate on those action proposals which fell within the competence of FAO, and should take fully into account the conclusions of the Fourth United Nations Conference on Trade and Development, to be held in Nairobi in May 1976.

24. In the meantime, the Committee suggested that the Director-General could submit Document CCP 75/20, as a Secretariat document, amended if judged necessary, to take account of the recommendations of the Seventh Special Session of the UN General Assembly, together with the comments of the Committee and those of the Conference, to the UNCTAD Secretariat for consideration in the preparatory discussions leading to UNCTAD IV.

2. International Agricultural Adjustment

25. The Committee discussed the item on the basis of three documents (C 75/18, CL 66/26 and CCP 75/2). The major document, C 75/18, contained the Director-General's proposals for a strategy of international agricultural adjustment prepared in response to the request of the Seventeenth Session of Conference and was prepared on the basis of broad objectives agreed to by Conference.

26. In introducing the Director-General's proposals, the Secretariat referred to the series of meetings and consultations undertaken in the course of their preparation. These included discussions by the Committee on Agriculture (COAG) in April 1974, by the series of FAO Regional Conferences in the present biennium, by the CCP in October 1974 and by two meetings of a panel of independent experts. The preliminary draft prepared following these meetings had been examined by an ad hoc Working Party of government representatives in May 1975, and, together with the Working Party's suggestions, by the FAO Council in June 1975.

27. The Secretariat informed the Committee that the major purpose of the proposed strategy was to provide member countries with a global framework which would facilitate their efforts to harmonize national policies and actions in the light of a consensus as to the desirable major changes in world agriculture. The strategy consisted essentially of a set of policy guidelines concerning production, consumption, trade and assistance, together with arrangements for systematic monitoring of the progress of international agricultural adjustment as a basis for a biennial "over-view" at ministerial level at FAO Conferences. These "over-views" would provide appropriate means for Conference to exercise policy guidance relating to follow-up actions needed concerning major issues and available options at world, regional and country levels.

28. The Committee noted that document C 75/18 was a report to Conference. It had been only very recently circulated and the processing of the Spanish version had not yet been completed. Accordingly, at this Session of the Committee only provisional views could be given. Definitive views would be made known to the Conference.

29. The Committee noted that the strategy proposed by the Director-General took account of the views expressed at the ad hoc meeting of government representatives and had also benefited from discussions at other meetings of FAO bodies. The Committee supported the general concept of international agricultural adjustment and the proposed guidelines were considered appropriate and useful as a starting basis. Suggestions made regarding these and other aspects of the strategy and its follow-up included:

- i) International agricultural adjustment should not be considered as a separate activity within FAO but rather as a global framework for drawing together in a coherent fashion the policy-oriented content of FAO activities, including, inter alia, those relating to food security, commodity programmes, nutrition, production requisites and activities at other fora, in particular those relating to Resolution No. 3202 (S-VI) of the Sixth Special Session of the UN General Assembly on the Programme of Action on the Establishment of a New International Economic Order and Resolution No. 3362 (S-VII) of the Seventh Special Session. The strategy could achieve its objectives only if its links with such other activities were fully developed.
- ii) Monitoring of progress in relation to the guidelines and objectives could present considerable difficulties until satisfactory procedures are developed initially based on a relatively small number of key indicators. The monitoring and analysis of results should be kept as concise as possible and presented in a condensed form.
- iii) Several delegates insisted on the necessity of a much higher degree of quantification and time determination of the guidelines, while several other delegates questioned the advisability and feasibility of such an approach.

- iv) The Secretariat work on adjustment and the Director-General's periodic reports would be of interest to a number of FAO standing bodies, including the GCP, the future Committee on World Food Security, and the COAG. Conference should designate the body primarily responsible for previewing these reports.

3. Future Work on Commodity Projections

30. At its Forty-Seventh Session the Committee had endorsed the Secretariat's proposal to prepare a new set of agricultural commodity projections, to be completed in 1976/77. It had also provided guidelines and suggestions on the main ways in which changes and improvements on previous projection exercises should be made, on the basis of which the Secretariat had set out proposals on the objectives, coverage, assumptions and methodology in document CCP 75/17 (Agricultural Commodity Projections: Proposals on the Scope and Methodology of the Next Round of Projections).
31. The Committee noted that the Secretariat was at present finalizing the working arrangements with a view to completing the new set of projections in 1976/77.
32. The Secretariat drew the attention of the Committee to three main areas of improvement which it proposed for inclusion in the new study, which would have time horizons centred on 1980, 1985 and 1990. These were:
- i) the proposal to undertake two stages of analysis. For working purposes only, the projections would be undertaken, in the first stage, using the same basic concepts as in previous studies, including those of constant relative prices, unchanged policies and the use of an up-to-date projection base-period. In compiling the final projections, it was intended that these restrictive assumptions would be relaxed in the second stage, by the incorporation of explicit assumptions concerning price responsiveness of demand and production and/or possible changes in agricultural policies;
 - ii) the proposal to base the projections, and their presentation, on a greater range of assumptions concerning prospective changes in basic factors which may be expected to influence commodity demand and production perspectives; and
 - iii) the intention to undertake systematic and more regular monitoring of the projections.
33. The Committee recognized the importance which many member governments attached to the FAO projections as a basis for assessment of long-term trends and problems, for use in policy formulations and as a source of information regarding global perspectives of demand, production and trade in commodities, nutrition and agricultural development.
34. A number of delegates emphasized, however, that all attempts at quantifying the future were by nature hazardous, especially in conditions of instability in commodity markets. These delegates therefore considered that it was particularly difficult to make long-term projections, with such a distant time horizon as 1990, as a basis for policy formulations.
35. Concerning the proposed methodological changes, the Committee in general agreed that the attempt should be made in the study to relax the former restrictive assumptions of constant relative prices and unchanged policies. It considered that the use of such assumptions was unrealistic in that it could give rise to imbalances between demand and production, which in practice could not persist in the long term and which had in the past been misinterpreted by some users of the projections. It was also pointed out that such misinterpretations could be avoided by distinguishing more clearly between projections and forecasts, for example by adopting a greater range of alternative assumptions concerning prospective changes in the main economic factors which influenced commodity situations.
36. Some delegates, while acknowledging the need for these improvements, pointed out that great care would be needed in the selection of quantitative indicators to reflect the responsiveness of demand and production to changes in prices and that in carrying out the work, account should also be taken of other factors, besides prices, which influenced demand

and production. They also pointed out that care would be needed in selecting suitable base-periods and reference points in order to minimize possible biases in the projected results; and further stressed the importance of ensuring the adequacy of other basic data, particularly in relation to the use of relatively sophisticated techniques as had been proposed by the Secretariat.

37. The Committee in general approved the proposal to monitor projections more regularly and systematically, subject to the availability of resources. Some delegates expressed the wish to examine further this aspect of the future work on projections in greater detail and to consider alternative ways in which monitoring exercises could be reviewed by the Committee and/or its intergovernmental groups. They advised that it might well be necessary to develop methods of monitoring which extended beyond mechanical up-dating exercises.

38. The Committee stressed that the Secretariat should develop close collaboration with Member Governments and other organizations and institutions which were working in the field of projections, for this purpose. The Committee further requested that the Secretariat should prepare a progress report on the study for consideration at its Fifty First Session.

II. FUTURE ROLE AND FUNCTIONS OF THE COMMITTEE

1. Terms of Reference and Programme of Work

39. At its Forty-Ninth Session, in October 1974, the Committee had anticipated that the decisions and recommendations of the World Food Conference would have important implications for its work in several fields, and had decided that at a subsequent session it should consider its future activities in the light of the outcome of the Conference and other relevant developments.

40. For its consideration at its Fiftieth Session, the Committee had before it document CCP 75/19, Future Role and Work of the CCP. This document (i) summarized the decisions of the World Food Conference which had a bearing on the work of the CCP, particularly the recommendations of the Conference concerning the functions of the proposed Committee on World Food Security and the Committee on Food Aid Policies and Programmes, (ii) reviewed the past and present activities of the CCP and its subsidiary bodies and (iii) as a basis for discussion by the Committee, outlined how the terms of reference, the activities and the working procedures of the Committee and its subsidiary bodies might suitably be amended in the light of the developments which had followed the decisions of the World Food Conference and of the constitutional functions of FAO.

41. Delegates unanimously agreed that the Committee had performed an important function in the past twenty-five years in the field of commodity problems and policies and that it should be maintained and continue to play a useful and necessary role in the future in the new international climate that had been created by the World Food Conference and the adoption by the Sixth and the Seventh Sessions of the UN General Assembly of a programme of measures for the establishment of a new international economic order. They also recognized that these developments and the establishment of the two proposed new committees recommended by the World Food Conference and endorsed by the UN General Assembly made it necessary for the Committee to re-orient its activities in some respects in order to serve effectively the needs of governments in the field of agricultural commodities. This would involve the maintenance of the Committee's recent activities but in a more "problem oriented" context. In general terms, its objective should be to prepare policy action proposals for submission to the FAO Council, and through it to the World Food Council and other bodies concerned. Its programme could include, for example:

- examination of cyclical and structural problems of agricultural products or groups of products, both on the supply and demand sides of international markets;
- the development of more integrated approaches to resolving the economic and trade-related problems of agricultural commodities and to their solutions;
- drawing up measures to facilitate international agricultural adjustment;
- formulation of proposals for dealing with these problems for negotiation in the appropriate fora.

42. The Committee agreed that its terms of reference were sufficiently broad to enable it to undertake such activities. However, the establishment of the two new Committees on World Food Security and Food Aid Policies and Programmes, which would be concerned with two important areas in which the CCP had been active in the past and in which it would undoubtedly continue to have a role to play, made it necessary to work out appropriate arrangements to avoid unnecessary duplication of effort and jurisdictional conflicts. Many delegates felt that these arrangements should not be difficult to evolve in practice and that the division of responsibility could be expressed by the insertion of a provision, after paragraph 6 of Rule XXIX of the General Rules of the Organization which specifies the Committee's present terms of reference, to take full account in its work of the responsibilities and activities of the other two committees.

43. The following wording was suggested: "The Committee shall take full account of the responsibilities and activities of the Committee on World Food Security and of the Committee on Food Aid Policies and Programmes in order to avoid unnecessary duplication of work, while fulfilling its role as the body within the Organization primarily responsible for commodity analysis and evaluation and related policy matters, covering all agricultural commodities." It was suggested that corresponding provisions might be included in the terms of reference of the proposed new committees. The Committee noted that the text proposed by it would be examined by the CCLM, in conjunction with the Draft Conference Resolution on the establishment of the Committee on World Food Security.

44. While emphasizing the need for greater policy orientation in the work of the Committee, most delegates felt that the main focus of the future work of the CCP could not be defined more clearly at the present juncture. More detailed definition of the Committee's role would have to await a possible review by the Council of its committee structure, the relevant decisions of the Conference and the outcome of UNCTAD IV. The Committee therefore agreed to resume consideration of the subject at its Fifty-First Session.

45. As regards the subsidiary bodies of the CCP, there was general agreement that some of them could usefully contribute to the work of the two new committees and thus avoid the setting up of new bodies by these committees. The Committee therefore requested its intergovernmental commodity groups, and particularly those on grains and on rice, as well as the Consultative Sub-Committee on Surplus Disposal, to provide all possible assistance which may be requested by the two new committees and authorized them to make special reports directly to these committees, when appropriate. Such reports would be made available to the CCP.

2. Methods of Work

46. With regard to the frequency and duration of its future sessions, the Committee expressed itself satisfied with the current practice of normally holding two sessions in every biennium, and wished to continue this, although in exceptional circumstances additional sessions might be needed. Many delegates felt it would be desirable to shorten the duration of sessions to eight working days or even to one week, but it was recognized that this would require a corresponding lightening of the Committee's workload. The Committee therefore agreed that the agenda of future sessions should, as far as practicable, be drawn up in such a way as to concentrate discussion on a small number of essential issues or items. It was recognized that it would be difficult to predict the agenda a year ahead of the session. The Committee agreed therefore that the Director-General, in consultation with the Chairman, should use his discretion in preparing the agenda, bearing in mind the desirability of limiting the length of the session.

47. Some delegations were of the view that proceedings at future sessions of the Committee could be speeded up if the review of the reports of subsidiary bodies, such as the intergovernmental groups, were to be limited to policy issues, conclusions reached by these bodies and matters referred to it for consideration or decision; or if the discussion of certain agenda items such as the world agricultural commodity situation and outlook could take place in a working party meeting concurrently with the plenary session of the Committee while some delegations pointed out the difficulties involved in doing this.

48. Some delegates felt that it would be advantageous if sessions of the CCP and of the Committee on World Food Security were held consecutively or jointly when appropriate though it was appreciated that the most suitable timing of sessions might not always be the same for both bodies, and that government representation might differ.

49. The Director-General was requested to take the above points into account in making organizational arrangements for future sessions.

3. Membership of CCP

50. The Committee recalled that the Conference had decided at its Sixteenth Session (1971) that membership of the Committee should be open to all interested Member Nations for a trial period of four years at the end of which the question would again be reviewed. There was unanimous agreement in the Committee that the experiment of open membership over the last two biennia had given very satisfactory results, having enabled all Member Nations interested in its activities to participate in its sessions. The Committee, therefore, requested the Council to convey to the Conference its view that for the future membership should be open to all Member Nations of the Organization and that the necessary amendments should be made in the Basic Texts of the Organization to give effect to this decision. The Committee noted that appropriate recommendations designed to facilitate accession to membership in all "open" Standing Committees of the Council were being submitted to the Conference at its forthcoming Session.

III. REVIEW OF THE WORLD AGRICULTURAL COMMODITY SITUATION AND OUTLOOK

51. The Committee reviewed the current world commodity situation and outlook on the basis of information contained in the FAO Commodity Review and Outlook, 1974-75 (Doc. CCP:75/6), in a supplementary document (Doc. CCP:75/7 and 75/7 Add.1), which summarized and updated CCP:75/6, in Agricultural Support Price Statistics 1971-75 (Doc. CCP:75/18), and in statements made by delegates.

52. The Committee welcomed the timeliness of the documentation, and its comprehensive treatment of agricultural market developments, which had been prepared for its review. It also noted the chapter of the Commodity Review and Outlook, entitled "Towards World Food Security: International Approaches to Food Stocks 1945-1975", which, it agreed, provided a valuable historical review and analysis of developments in international cooperation in this vitally important field. It recommended that future issues of the Commodity Review and Outlook should illustrate the progress made in the implementation of the nutrition surveillance scheme, and that the food situation in the Most Seriously Affected countries should be assessed in greater detail. It also recommended that the contents of the Commodity Review and Outlook should, as far as possible, avoid duplicating material presented in other documents.

53. One delegate was of the view that the presentation of the Commodity Review and Outlook lacked balance, and that the evaluation of developments in agricultural trade conveyed the impression that the gains of developed exporting countries had been achieved at the expense of the developing countries. Most delegates, on the contrary, agreed that the orientation and content of the Commodity Review and Outlook and related documentation presented to the Committee, were objective and well balanced and that it reflected the justifiable concern of the entire international community about the severe commodity problems of the developing countries. It was, moreover, consistent with the results and recommendations of the Seventh Special Session of the General Assembly on development and international economic cooperation, on future approaches to these problems, which represented a general consensus at a high political level calling, *inter alia*, for an intensification of efforts in favour of developing countries, and thus provided a framework for FAO's analysis of commodity problems faced by developing countries. It was further considered that the monetary gains which had accrued to the developing countries as a consequence of increases in commodity prices during 1972-74 had been only temporary and that these gains had to be viewed against the long-term deterioration in most of these countries' economic position compared with that of the developed countries taken as a whole. Some delegates felt that the trade policies of some developed countries were detrimental to the interests of the developing countries and tended to nullify efforts to establish an effective world food security system.

1. Survey of the Current Situation in 1974/75

54. The commodity boom, which had begun in 1972/73, had continued well into 1974 with prices of most agricultural products reaching post-war peaks, and though the boom had broken before the end of the year, prices had generally fallen less steeply than they had risen. This had been due partly to the relatively short supplies of many foodstuffs, notably cereals and sugar, as well as of cocoa and certain textile fibres, partly to rapidly rising costs of agricultural inputs, and partly to continuing inflationary pressures. In September 1975, prices of most agricultural commodities accordingly remained higher than they had been before the boom even though the increase in real terms was lower because of the general inflation of costs and prices. Prices of wheat, rice and sisal stood at levels almost three times as high as those prevailing in March 1972, and those of coarse grains, coffee and cocoa were almost twice as high. Moreover, prices of some commodities (notably cereals, beverages and apparel fibres) were rising again following depletion of stocks, improvement in the industrial outlook, or the emergence of unfavourable crop prospects for 1975/76. Prices of jute, however, had had to be bolstered by stockbuilding in exporting countries since demand had fallen even more sharply than supply.

55. World agricultural production had advanced only very slightly in 1974, being hampered partly by physical shortages of fertilizers, especially in developing countries, much higher prices of all agricultural inputs and by the vagaries of weather. Production of wheat and coarse grains had fallen by some 4 percent, but shortages had been mitigated by extensive destocking and by shifts from coarse grains to oilcakes and meals, pasture and roughage in

the feeding of livestock. Output of oilseeds, meat and sugar increased further, but whereas stocks of meat had been built up in the developed countries, sugar had become relatively scarce due to heavy buying in anticipation of poor beet crops in 1975/76. As regards non-food commodities, production of coffee, wine and jute had declined; coffee supplies had nevertheless been maintained by drawing on stocks in expectation of substantial production increases in 1975, and the glut of wine continued because production fell only slightly short of the previous year's record. By contrast, output of tobacco, hard fibres and hides and skins had risen, leading to a marked weakening in the prices of hard fibres and hides and skins, but not in the prices of tobacco, import demand for which had been rising. On balance, while supplies of wheat and coarse grains had generally been tight, supplies of most other commodities had by mid 1975 become more plentiful in relation to demand. During the debate it was stressed by certain delegates that among the factors which had hampered the production of some export crops were unremunerative prices, and market restrictions.

56. The volume of agricultural trade had shrunk by some 4 percent in 1974, reflecting smaller import requirements for the higher-priced foods and beverages, for coarse grains to feed cattle, and for industrial fibres, and stagnating demand for staple foodstuffs and rubber. These developments had been due largely to falling real incomes and partly to the introduction of import or export restrictions. Significant increases had occurred only in exports of oils, oilcakes and meals which had been increasingly substituted for scarce grains, and in exports of tobacco, for which import demand had expanded in the United States and Japan following cuts in domestic production. World trade in sugar, though showing no further expansion, had nevertheless been close to the record levels achieved in 1973, mainly due to fears of a shortage in the event of a poor beet harvest in the northern hemisphere in 1975/76.

57. The value of international trade in agricultural commodities had risen in 1974 by some 19 percent to an estimated \$106 500 million. The developing countries had earned approximately \$6 100 million more than in 1973. The additional export earnings of the developed countries had come to about \$9 000 million, more than half of which had reflected the higher value of forestry products, especially processed wood, pulp and paper. Finally, the centrally planned countries had earned approximately \$2 000 million more from their exports of agricultural commodities, forestry and fishery products.

58. The terms of trade of agricultural exports had shown little improvement, since the overall rise in agricultural export prices had been virtually matched by the increases in the average import value of manufactures. The terms of trade of wheat, rice, fats and oils, sugar, pepper, cocoa and hard fibres had risen in real terms in relation to manufactures, while the terms of trade of meat, dairy products, oilcakes and meals, citrus fruit, bananas, coffee, wine, cotton, jute and hides and skins had deteriorated significantly. However, even though the terms of trade of certain commodities had improved vis-à-vis manufactures, this had not necessarily constituted a net gain to individual exporters of those commodities since the prices of many essential imports had increased markedly between 1973 and 1974. In this connection, some members suggested that the Secretariat should undertake more detailed analyses of the effects of changes in the terms of trade and of other trade developments in individual categories of countries, and the MSA countries in particular, for inclusion in future Reviews.

2. Assessment of the Short-term Outlook

59. The Committee noted that in 1975/76, agricultural commodity markets would again be conditioned by levels of economic activity and by prevailing rates of inflation, as well as by the volume of agricultural production. On current indications, it seemed that the recession would continue throughout the remainder of 1975, with some further easing of inflationary pressures, at any rate in the industrial countries. The recent introduction in a number of countries of reflationary measures to reduce unemployment nevertheless pointed to higher levels of economic activity at the turn of the year. Recovery was expected to accelerate in the early part of 1976 in the United States, but might be somewhat delayed in other developed countries.

60. Current information pointed to generally larger crops in 1975/76, though production of wheat and coarse grains was expected to show little change. Grain supplies might thus be

sufficient to meet current demand, but not to rebuild depleted stocks. By contrast, the 1975 rice crop might well reach an all-time record, and the world food shortage might accordingly be alleviated. Bumper grain and rice crops were anticipated in North America, the Far East and China, but falls for grains were indicated in Europe, the U.S.S.R., Australia and Africa, chiefly as a result of drought. Output of the main fats and oils, oilcakes and meals was also likely to be considerably higher in 1975/76 than it had been a year earlier, mainly due to exceptionally large soybean crops in the United States and Brazil, and to increased output of groundnuts and palm oil.

61. Record cattle inventories, continuing high feed costs and limited availability of pasture and forage had led to high slaughter rates in early 1975 and these might rise further in the event of continued low prices for feeder calves. A significant increase was therefore anticipated in beef production, especially in North America, the EEC and eastern Europe, although this could jeopardize production potential for the years after 1976. Output of pigmeat and poultry meat might also rise in response to shifts in consumer demand from beef and thus to cheaper meats, but production of mutton and lamb would probably decline. World production of milk was expected to increase again, though at a slower rate than in recent years. A marked expansion in sugar beet plantings would probably be reflected in a near record output of sugar, despite a sharp drop in yields caused by drought in the northern hemisphere and slow growth in the cane crop. Output of cane sugar was not expected to increase significantly before 1977, when additional production capacity was scheduled to come on stream.

62. Coffee production in 1975/76 was expected to decline from the exceptionally high levels of the previous season, reflecting small to medium crops in Brazil; slight increases were, however, anticipated in world production of cocoa and tea. Output of citrus fruit, bananas, tobacco and pepper was also likely to increase further. With regard to raw materials, production of cotton and jute might probably decline with shifts of acreage to more remunerative food crops, and sisal output might decrease following the drop in world prices. Output of rubber, wool and hides and skins, on the other hand, was likely to increase.

63. On the basis of current and prospective economic trends, it seemed unlikely that consumer demand for most agricultural commodities could improve to any significant extent before the end of 1975. Consumption of non-essentials such as sugar, coffee and tea might even decline, but demand for basic foodstuffs such as wheat, coarse grains and fats and oils, some of which had been in short supply during the past two or three years, was likely to be well-maintained. The volume of world trade in food grains was also expected to remain high, following the re-emergence of the U.S.S.R. as a major importer. Very little immediate recovery was foreseen in the demand for meat despite low prices, and demand for milk and milk products was likely to fall further, thus reducing requirements for oilcakes and meals. Demand for sugar was also likely to remain depressed until the unrecorded stocks previously accumulated by users had been drawn down. In the case of other commodities, little change in demand was anticipated until industrial activity revived and growth in consumer incomes was resumed. Consequently, the volume of trade in agricultural commodities was expected to show little change in 1975.

64. In view of the improvement in crop prospects for 1975/76 and the depressed level of demand, prices of most agricultural commodities were unlikely to strengthen during the final months of 1975, those of the principal food commodities, particularly cereals and livestock products, declining further and those of tropical fruits, beverages, tobacco and spices showing some signs of recovery. As regards agricultural raw materials, it appeared likely that prices of jute and hard fibres would continue downward with more intensive competition from synthetics for shrinking markets, but prices of cotton and wool might strengthen with smaller supplies and the need for replenishing mill stocks: prices of rubber and hides and skins might continue their current recovery, which reflected some revival in purchases by manufacturers. For the year 1975 as a whole, average prices of agricultural products were nevertheless likely to remain lower than they had been in 1974.

65. Looking further ahead to 1976, the Committee concluded that demand for agricultural commodities, particularly for agricultural raw materials and the more income-elastic foodstuffs such as livestock products, beverages and tropical fruits, was expected to rise again steeply once recovery was under way. In the case of jute and sisal, stocks of which had recently

been built up significantly, the rise in prices was likely to be mitigated or nullified by destocking, but in most other commodities, stocks of which were currently very low, the increase in prices might well be accelerated by a recurrence of speculative buying. Economic recovery might also be accompanied by a renewed acceleration of inflation, in which case the prices of many agricultural commodities could rise to new peaks, at least in money terms.

3. Longer-term problems

66. The Committee's deliberations on longer-run prospects in world commodity markets focussed on two issues, ~~namely~~²⁺: the future trend of agricultural prices and their degree of instability.

67. The Committee recognized that the levels at which world prices of agricultural commodities would eventually settle, and whether these would be higher or lower than the levels prevailing before the recent boom, would depend not only on trends in farm costs but also on economic and social factors not directly connected with agriculture. The 1972-74 boom had been caused primarily by the exceptional expansion of economic activity in all the industrialized countries simultaneously, and by the widespread production shortfalls resulting from rising costs and bad weather, which had been aggravated by speculative action, and buying to hedge against inflation and exchange rate adjustments. Nevertheless, the upward movement in commodity prices had also reflected a number of fundamental changes in the world economy, including a growing realization that:

(a) non-renewable resources would in future have to be more carefully managed;

(b) environmental protection was becoming increasingly important; and

(c) pressure on agricultural resources might increase, ~~to raise~~^{this way} the general level of commodity prices.

68. At the same time, the Committee considered that high commodity prices, together with recent deliberations and policy decisions at the national and international level - including the resolutions adopted by the World Food Conference and the Seventh Special Session of the UN General Assembly - could be expected to stimulate research and investment geared both to accelerating production and to more economical use of scarce inputs.]

69. In money terms, commodity prices were likely to remain considerably higher than they had been before 1972 because (i) past inflationary pressures had already been built into the economy, (ii) world inflation might accelerate again with recovery in economic activity, (iii) stocks were less likely to reach levels at which they would significantly depress markets, and (iv) further intensification of agricultural production might well involve greater cost increases than formerly.

70. The Committee was concerned that instability of international commodity prices might become a more recurrent feature of commodity markets, due to the operation of the following factors: (i) the possibility of a decrease in the level of international trade in some commodities in relation to total production, with the consequence that even relatively small variations in production could lead to greater fluctuations in world market prices than hitherto; (ii) the insufficiency of stocks for smoothing out variations in supply; (iii) the more widespread adoption of national stabilization measures, which might aggravate instability in international markets, (iv) vagaries of nature compounded by temporary shortages of certain inputs or sudden changes in their prices, (v) in the case of non-food commodities, more intensive competition from synthetics, and (vi) speculative activity.] Some members, pointing out the possibility that price instability might have serious adverse effects on investment in agriculture and, hence, on the growth of agricultural production, suggested that this question should be analysed thoroughly by the Secretariat.

71. The great diversity of the factors causing instability indicated the need for a wide range of international stabilization measures for commodities, designed to meet individual requirements. In this connection some delegates observed that even though in certain cases commodity agreements could contribute to the transfer of resources from the developed to the developing countries, the principal aims of such agreements were stabilization of prices

for the benefit of exporting and importing countries alike, and the achievement of a better long-term balance between supply and demand for the commodities concerned. Other delegates felt that this was yet another reason for seeking additional types of machinery to effect income transfers in favour of developing countries.

72. These and related matters had been the subject of the Committee's discussions of International Action Relating to Agricultural Commodities - FAO's Role in the follow-up of Recommendations of the Seventh Special Session of the UN General Assembly in the field of agricultural commodities, which are reported in Section I. 1, paras 12 to 24 above.

IV. REPORTS OF THE COMMITTEE'S SUBSIDIARY BODIES AND OTHER COMMODITY MATTERS

1. Reports of intergovernmental commodity groups and sub-groups

(i) Grains

73. The Committee noted the main conclusions and recommendations contained in the Report of the Nineteenth Session of the Intergovernmental Group on Grains (CCP 75/5) which had met in October 1975 in Rome.

74. In its review of the situation and outlook, the Group concluded that conditions were somewhat improved over the past year, following an expansion of about 3 percent in wheat and coarse grain production and prospects for better rice crops in many countries in Asia. This would allow some increase in food consumption, and feed consumption was also expected to improve somewhat over the lower levels of 1974/75. Trade in 1975/76 for wheat and coarse grains was expected to expand from levels of the previous year due almost entirely to large U.S.S.R. purchases. To meet these requirements, stocks in some exporting countries would have to be reduced although for the main exporters as a group, coarse grain stocks might increase slightly with wheat stocks remaining virtually unchanged. Early prospects for improving food security had now diminished and the world would continue to be heavily dependent for its food supplies on the outcome of the 1976 cereal production. In view of this situation, the Group had emphasized the overriding importance of maintaining a high level of production in 1976/77.

75. In respect of the evaluation of current and prospective world cereal stock levels and national policies, the Committee noted that the Secretariat document presented a comprehensive account of the world cereal stock situation which would be useful in maintaining the momentum of work in FAO and other fora. The Committee agreed with the Group's conclusion that there was urgent need to give higher priority to the expansion of cereal production, which would require more assistance for developing countries. Only under improved supply conditions could stocks be satisfactorily replenished.

76. The Committee also agreed that continued emphasis should be given to cereal production in 1976 and that the situation required close monitoring. In this regard, the Committee noted the close interlinkage between the activities of the Grains Group and the Global Information and Early Warning System.

77. In this connexion, the Committee was informed of the progress made in FAO with the establishment of the Global Information and Early Warning System on Food and Agriculture. Forty-four countries and the EEC had joined the System to date. Monthly, Quarterly and Special Outlook Reports had been issued to governments at regular intervals since April 1975, covering cereals and other basic foods as well as main inputs such as fertilizers and pesticides. Specific information had been provided to member governments on request. Arrangements were now being made to improve the inflow and outflow of information, and to encourage a wider participation of countries.

(ii) Rice

78. The Committee took note of the report of the Eighteenth Session of the Intergovernmental Group on Rice (CCP 75/13) held in Rome in January 1975. It noted that the Group in its analysis of the world rice situation, had concluded that supply and demand was more in balance in 1975 than in the previous two years, but several rice importing developing countries continued to face the problem of financing rice imports at current prices. Further, no significant replenishment was expected in world rice stocks at the end of the current season. The Committee also noted that on present indications, a record world paddy harvest of more than 340 million tons was anticipated in 1975, which would determine the outlook for 1976.

79. The Committee noted that the Rice Group continued its interest in analyses of national rice policies and had asked the Secretariat to extend special policy studies to other countries in addition to the six countries already covered (Australia, Burma, Japan, Thailand, the United States and the EEC). The Committee was informed that, in response to this request, the Secretariat intended to submit a report on the rice policy of Indonesia at the session of the Rice Group which was planned for March 1976.

(iii) Meat

80. The Committee took note of the report of the Fifth Session of the Intergovernmental Group on Meat (CCP 75/4). It noted that world meat trade prospects remained discouraging for the second consecutive year, especially for beef and veal. During the session of the Group, exporting countries had stressed the seriousness of the problems caused by trade restrictions imposed by a number of major importing countries on these commodities, and the developing and Eastern European countries had urged the immediate suspension of these restrictive measures. Many developing meat exporting countries had also brought to the attention of the Group the existence of sanitary barriers which in certain cases acted as a pretext for preventing access for their meat to some importing countries. In its discussions on market access and related problems, the Group had favoured the continuation and possible extension of its current programme of work, which included improved market information and analysis, reviews of cyclical tendencies in the beef industry and assessment of the feasibility of alternative systems of stabilizing international trade, as well as analysis and exchange of information relating to national policies. In this connexion, the Group had considered in a preliminary way, a set of draft guidelines for international cooperation, aimed at securing a continuous and balanced expansion in beef consumption, production and trade. The Committee noted that the Group had agreed, in principle, that some form of consensus on objectives of international cooperation could be useful to governments in formulating national and international measures relating to the beef industry. The Group had also considered that the draft guidelines provided a starting point for their discussion and further elaboration, and had agreed that the proposed guidelines should be discussed in detail at its next session with the aim of reaching agreement on a revised version for adoption by the Group.

81. In the discussion in the Committee, exporting countries reiterated their great concern in regard to the world market situation for beef. They referred to the difficulties which it caused for their beef industries and export trade, and stressed the need to avoid national measures which, while aimed at resolving domestic market difficulties, had major disruptive effects on international trade. Market instability was a central problem and it should therefore continue to receive adequate attention in the Intergovernmental Group on Meat. The Committee noted that the work programme of the Group, as endorsed at its last session, provided a number of approaches to a better understanding of the main market forces and to the achievement of greater market stability.

82. The representative of the EEC informed the Committee that, since the meeting of the Group, the Community had taken certain measures in the beef sector in order to meet some of the difficulties which had been stressed at the meeting by the exporting, especially developing exporting, countries.

83. Some delegations suggested that larger supplies of meat and meat products should be made available for food aid purposes, a part of which could be channelled through the World Food Programme, with preference being given in purchasing these supplies from developing meat exporting countries, as recommended by the World Food Conference. They further requested that this subject be discussed at the first session of the proposed Committee on Food Aid Policies and Programmes and suggested that progress be reviewed at the next session of the Group on Meat. One delegate suggested that the possible increased use of meat and meat products for food aid be brought to the attention of the CSD.

(iii) Oilseeds, Oils and Fats

84. The Committee took note of the Report of the Ninth Session of the Intergovernmental Group on Oilseeds, Oils and Fats (CCP 75/11).

85. The Committee noted that, on trade and policy matters, the Group had stressed the continuing need for effective and early action to resolve the trade problems of these commodities. In assessing its own activities in this field, the Group had recognized the importance of keeping in close touch with initiatives underway in other fora, and noted the suggestion that, at its next session, it might usefully review its role and implications for future programme of work in the light of the progress made on these initiatives. It had also been suggested that the special situations of palm oil and castor oil might deserve further study and that possibilities for action should be examined.

86. The Committee noted that the Group had reviewed developments in the national production policies of selected developing countries, and had agreed to extend its work on national policies so that both production and trade aspects of policies might be covered and the country coverage widened to include developed and centrally planned economies.

87. In connexion with the Group's customary review of the current situation and short-term outlook, the Committee recognized that some difficulties still existed in obtaining a thorough evaluation of this large and inter-related group of commodities. The Committee noted that the Group had therefore asked the Secretariat to prepare, for its next session, a comprehensive re-appraisal of this aspect of the Group's work.

88. In commenting on the report, the Committee was in general agreement with the main conclusions and recommendations of the Group and expressed the hope that suitable follow-up actions would be taken. Some delegates pointed out that the wide price fluctuations shown by these commodities was a major problem of exporting countries and especially for those producing tree crops such as palm oil in view of the long period between planting decisions and full yields. They expressed the view that there was a particular need for action to stabilize prices over a longer term. Some delegations also suggested that the GSP of the EEC should provide for the duty-free entry of palm oil and that the broad principles of the Lomé agreement should be extended to other developing countries.

(v) Bananas

89. The Committee took note of the report of the Sixth Session of the Intergovernmental Group on Bananas, held in May 1975 in Abidjan, Ivory Coast, and in particular the recommendation that, in view of the continued deterioration of prices in real terms, the Director-General should convene a Working Party of exporting and importing member countries to develop an effective mechanism for ensuring equilibrium between supply and demand of bananas at prices which are remunerative for producers and reasonable for consumers. Some delegates suggested that smaller exporting countries also be represented on the Working Party, as well as on the Intergovernmental Group.

90. The Committee noted with satisfaction that considerable progress had been made in Abidjan towards developing a common approach by exporting and importing countries and that the climate for further progress had become more favourable, and that there was need for further informal consultations among exporting countries concerning harmonization of production and export objectives. The consensus was that such consultations with various individual countries and groups of countries would be the best way to prepare the ground for concrete progress at the first meeting of the Working Party which was scheduled to be held during the first part of 1976. The Committee further noted that the Workshop Seminar on the principles and provisions of an international agreement for bananas, which was held in September in Costa Rica under the auspices of the Union of Banana Exporting Countries (UPEB), and in which the OAS, FAO and UNCTAD had participated, had served a very useful purpose in exploring the specific problems of an international agreement in the light of experience of other commodity arrangements. The informal consultations between the UPEB exporters as well as other groups were continuing and documentation outlining possible approaches to international cooperation for examination by the Working Party were being prepared.

(vi) Citrus Fruit

91. The Committee was informed of the results of the Third Session of the Steering Sub-Group of the Intergovernmental Group on Citrus Fruit which was held in March 1975 at FAO Headquarters. It was recalled that the session had been convened in order to consider international approaches to the grave economic problems confronting citrus producers and exporters and make proposals for possible lines of remedial action. Although, due to a number of factors, including reduced supplies in some major producing countries, the short-term situation had temporarily improved, the Sub-Group concluded that for the medium to longer term the world citrus economy would continue to be confronted with grave problems of market disequilibrium and low prices as a result of the likely expansion of production and the uncertain outlook for demand. These problems were particularly acute in the Mediterranean-European area where the bulk of international trade in fresh citrus fruit took place.

92. The Committee noted the general lines of the recommendations made by the Sub-Group to the Intergovernmental Group on future activities, as contained in its report. It noted with interest the new proposals made to approach the problems on a geographic basis, in view of the different problems affecting the various citrus producing regions of the world, but it was pointed out that the interest of other regions should be borne in mind and that all activities be within the framework of the full Group. It was also pointed out that duplication of work with other organizations should be avoided.

(vii) Cocoa

93. The Committee heard a report on the international development in cocoa since its last session. It noted that, in view of the successful organization of statistical work by the International Cocoa Organization, the FAO Sub-Group on Statistics had decided to suspend its activities and the Director-General had terminated publication of the quarterly bulletin on Cocoa Statistics. However, work in FAO on grading and quality standards for international trade in cocoa was continuing and, following consultations with the main exporting and importing countries, a final session of the Working Party on Grading was planned for 1976, probably in Latin America, to review the FAO Model Ordinance and Code of Practice. The Committee also noted that it was the intention of the Director-General, following repeated requests by the major cocoa importing and exporting countries, to issue an up-to-date study on the long-term outlook for production and consumption of cocoa beans. It was FAO's hope that the study would be carried out to the largest extent possible in cooperation with the International Cocoa Organization.

94. The Committee heard with satisfaction that the UNCTAD Conference to renegotiate the International Cocoa Agreement had come to a successful conclusion during the Committee's deliberations. The new Agreement would provide for a pivot price of 47 US cents a lb with a range of 8 cents on either side and a mechanism of quotas plus buffer stock operations to protect the price range. The buffer stock aspect was strengthened in the new Agreement and there was an important innovation that payment for cocoa purchased by the buffer stock would be at the prevailing market price. However, one major exporting and one major importing country were of the view that the new aspects did not go far enough and had stated that they might be unable to accept the Agreement. The Committee noted that the price range was centred at a considerably higher point than that of the 1972 Agreement and that it was hoped that the new Agreement would provide greater incentives for expanding production of cocoa beans.

(viii) Tea

95. The Committee heard a report on developments with regard to tea during the past year when a reduction in the growth of world supplies had brought about an improvement of about one third in tea prices. Nevertheless, in 1974 export unit values had still remained below the levels prevailing in the early sixties and in real terms prices had fallen further in 1975. Although importing countries had generally welcomed initiatives to tackle the very serious problems of the tea industry, exporting countries had found it difficult to obtain agreement on a viable system of export restriction.

96. Since the last meeting of the Intergovernmental Group there had been various initiatives. A Working Party of the Sub-Group of Exporters had examined a number of elements of a multi-dimensional approach at a technical level. At the next sessions of the Group and its Sub-Groups, to be held in March 1976 in a major exporting country, there would be two lines of attack, the first of which was aimed at the expansion of consumption. One of the main activities would concern the setting up of an international tea promotion body. The UNCTAD/GATT International Trade Centre and the Commonwealth Secretariat had conducted a joint survey of detailed proposals by exporting countries for the constitution, structure, functions and financing of such a body. The second approach would be to consider an international commodity agreement to regulate export supplies, supplemented perhaps by other measures such as compensatory financing and short-term stock operations. While promotion activities could be most helpful in the long term, market management was probably the most effective way of correcting unfavourable price developments in the short term. The Secretariat felt that the chances of concrete action had improved considerably. The Committee took note of the report of the Working Party of the Sub-Group of Exporters and future plans for the activities of the Intergovernmental Group on Tea, and expressed the hope that the forthcoming meetings would lead to constructive action on the problems of tea.

(ix) Wine and Vine Products

97. The Committee took note of the report of the Third Session of the Intergovernmental Group on Wine and Vine Products which was held in October-November 1974 in Tarragona, Spain. It noted in particular the Group's conclusion that the outlook for wine had changed. Due to very heavy planting in many countries and the deterioration in world economic conditions, there appeared to be danger of production growing faster than demand, and the Group had therefore issued a clear warning concerning continuation of planting. It drew attention to the need for governments and producers to adapt production plans to foreseeable marketing requirements and to exercise caution before initiating new planting programmes.

98. The Committee noted that the predictions of the Group had been borne out by events and that the problems affecting the world wine economy were of a global nature caused by excessive supplies and low prices which affected many wine producing countries. It was pointed out by the Group that solutions would also have to be global and would require long term production adjustment measures as well as measures to promote consumption.

99. The Committee took note of the finding of the Intergovernmental Group and its recommendations for future activities. It was stated that the semi-annual reports on production, trade, price and consumption developments and policy changes prepared by the Secretariat at the request of the Group were of great value and provided governments concerned with pertinent information, which is not available from any other sources.

(x) Jute, Kenaf and Allied Fibres

100. The Committee took note of the report of the Tenth Session of the Intergovernmental Group on Jute, Kenaf and Allied Fibres which had been held in May 1975. It noted that the situation of jute appeared increasingly critical since, even following the recent devaluation of the Bangladesh taka, the Group had been unable to recommend any meaningful indicative range of export prices which could, on the one hand, be remunerative to growers vis-à-vis rice, and, on the other, be competitive with synthetics. The Committee noted however that the Group had re-emphasized the validity of the objectives of the informal price arrangement for jute and hoped that it would be possible for the Group to recommend indicative prices at its next Session.

101. With regard to the question of synthetic competition, some delegates expressed concern at the threat to jute's remaining markets. They pointed out, however, that there was probably an element of artificiality in this competition, since the large multi-national corporations were possibly adjusting internal cost/price relationship within their companies to the detriment of jute. They asked that, if possible, a study of this particular aspect of competition be undertaken by the secretariat. They further stressed that the impact of market losses for jute should be considered a matter of major international concern since the economies of the main producing countries should not be allowed to deteriorate further, thus requiring further substantial foreign aid transfers from both multilateral and bilateral donors. They felt that serious attention should be paid to this aspect of the deteriorating market position of jute by FAC and other UN agencies.

102. The Committee re-emphasized the need for much enhanced agricultural and industrial productivity in the jute sector, a continued search for diversification of uses and markets for jute, and substantial promotional efforts, stressing, *inter alia*, the environmental advantages of using a natural fibre. It is hoped that the New Delhi meeting of producing countries to launch Jute International, which was scheduled for late October 1975, would finally mark the establishment of this long-projected international research and development institute for jute to begin the urgently required work on the above objectives.

(xi) Hard Fibres

103. The Committee took note of the reports of the Eighth and Ninth Sessions of the Intergovernmental Group on Hard Fibres held in January and July 1975 respectively. Despite extremely high prices at the time of its Eighth Session the Group had been unanimous in its wish to keep its informal arrangements on export quotas and indicative prices for sisal and henequen operational in principle. The CCP also noted that, when the market situation had changed by the time of the Ninth Session and prices had dropped considerably, the producing countries had decided to cut export quotas by 20 percent in an attempt to prevent prices from falling further. However, it had regretfully become evident that a situation had been reached where, as with jute, there was currently no price for sisal which was competitive with synthetics and at the same time remunerative to producers.

104. Some delegates considered that the views expressed with regard to the role of multi-national corporations in the competition between jute and synthetics (see paragraph 101) were also applicable to sisal and asked the Secretariat if possible to prepare a study of this matter.

105. The Committee was further informed that the Group had discussed various possibilities for ensuring an orderly development of the world abaca market, including indicative price arrangements and a buffer stock in the Philippines. The most practicable and effective approach had however been considered to be an intensification of forward contracting in order to assure adequate supplies from farmers in the Philippines. Problems of coir fibre and yarn had also been assessed by the Group and common solutions sought in informal meetings of producing and consuming countries. The Committee also noted that the Group was actively continuing its efforts in the field of research under the auspices of its Advisory Working Party on Hard Fibre Research.

106. Bearing in mind the grave situation which hard fibres were facing, the Committee noted that these fibres constituted one of the commodity groups proposed to be dealt with under the UNCTAD integrated programme. It noted that proposals made so far by UNCTAD were not confined to stocking arrangements but embraced a number of other policy actions including compensatory financing and research and development. The Committee emphasized that a diversity of measures might be called for to tackle the problem of hard fibres, since these were not one homogeneous product. There were in fact at least four different major hard fibres (sisal/henequen, abaca, coir fibre and coir yarn) each with its own end-uses, its specific problems, and consequently its distinctly different requirements for solutions.

2. Twenty-Fifth Report of the Consultative Sub-Committee on Surplus Disposal

107. The Committee welcomed the Twenty-Fifth report from the CSD and expressed its appreciation to Acting Chairman Bammel who had come to Rome to present the report and discuss it with the Committee. It agreed that the basic function of CSD to monitor concessional transactions and thus contribute to the orderly marketing of agricultural commodities continued to be one of the factors in market stability.

108. The Committee also considered that the Sub-Committee offered a valuable forum for discussions of all aspects of surplus disposal and welcomed the initiative of its chairman to make its functions better and more widely known to many countries not formerly closely associated with the CSD. It noted that with the newly accepted goals for food aid, with its minimum target of 10 million tons of cereals, the work of the Sub-Committee might become even more important as concessional transactions increased with the concomitant danger of interference with commercial markets.

109. It welcomed the work of the Sub-Committee on further definition of the term "relatively small size transactions" and noted the fact that the Sub-Committee had decided not to define emergencies any more precisely than was done by WFP and FAO. In this respect, one delegate suggested that both "relatively small size" and "emergency" might be interpreted differently depending on the country and circumstances involved.

110. The Committee did not rule out the possible return of surpluses in some commodities and noted that serious problems were already apparent in dairy products. It further noted that the maintenance of food security might well involve more countries in more concessional transactions giving wider importance to the work of the CSD.

111. In the latter respect, attention was drawn to the earlier report "CSD: Adaption to Changing Conditions" with the description that that report contained on past and potential activities.

112. The Committee concluded that the CSD remained an important forum in which countries could discuss the problems arising from food aid and other concessional transactions. It agreed that it was not an appropriate time to consider any restructuring of these activities within any related international institutions, nor was it time to change either mandate or name. It thus could not support the proposal of the representative of the International Federation of Agricultural Producers that the CSD should be renamed and should report to the proposed Committee on Food Aid Policies and Programmes. In this respect, it referred to its earlier decision that CSD should provide all possible assistance requested by the two new committees.

113. The Committee considered its own the principles and definitions of surplus disposal of continuing importance and cautioned against a rigid imposition of UMR's without regard to the flexibility suggested by balance of payments problems or emergency needs.

114. It closed its consideration of this item with a tribute to the staff support of CSD both in Washington and Rome. The Committee paid special tribute to Mr. R.C. Tetro on his impending retirement as Secretary to the Consultative Sub-Committee on Surplus Disposal. The Committee recognized that he had made a very constructive and effective contribution to the work of the CSD and extended its appreciation to him.

3. Expert Consultation on Cereal Stock Policies Relating to World Food Security

115. The Committee took note of the report of the Expert Consultation on Cereal Stock Policies (CCP 75/15), held in February 1975. It noted that this report had already been considered at the intergovernmental level during the ad hoc Consultation on World Food Security in May 1975. Commenting on the report, the representative of the International Wheat Council stated that the report of the Expert Consultation was very useful in the context of the discussions currently underway within the Preparatory Group established by the International Wheat Council to examine possible bases for a new international arrangement to replace the International Wheat Agreement of 1971.

4. Methods of Work of Subsidiary Bodies

116. Some delegates suggested that sessions of the Committee's subsidiary bodies could be shortened if country statements were not made orally, but were circulated as session documents. The Committee pointed out that methods of work varied between different subsidiary bodies, and that it would be inappropriate to standardise procedures for all bodies in this respect. The Committee drew the attention of its subsidiary bodies to the suggestion, and requested them, in the interests of economy, to examine the possibility of reducing the duration of their sessions without in any way impairing the quality of their work.

5. Other Commodity Matters

(i) Milk and Milk Products

117. The Committee took note of the secretariat's annual review of national dairy policies which analysed recent policy measures by member countries and their implications for the international dairy market. The paper pointed to the growing imbalance, particularly in the skim milk powder sector, where stocks had risen to unprecedented levels. The secretariat paper noted that with current efforts concentrating on halting the accumulation of stocks, the cost of dairy policies of surplus producing countries was likely to increase and the discrepancy between consumer prices and effective costs of production and marketing to widen further. The review concluded that prospects for adjustment of supplies to commercial outlets were poor and suggested that governments of surplus producing countries should consider some decrease in the real price of milk to producers. With regard to food aid as a possible major outlet the paper stressed that it was necessary to ensure that this did not discourage the promotion by recipient developing countries of their own milk production in areas suitable for dairying.

118. During its discussion, the Committee stressed the importance of including in the future reviews information on national dairy policies from a larger number of member countries, in particular from the developing regions, with special reference to their dairy development programmes. The representative of O.E.C.D. informed the Committee that his organization planned to consider shortly the possible role of food aid as an outlet for dairy surpluses.

(ii) Hides and Skins

119. The Committee took note of a document prepared by the Secretariat on "Issues Arising from an Informal Meeting of Experts on the Improvement of Commodity Intelligence and Statistics for Hides, Skins and Leather" (document CCP 75/21). It was also informed of the reactivation of the Secretariat's work on hides and skins, and its recent attempts to improve the extremely complex statistical and intelligence base of this commodity group. In the absence of any intergovernmental forum to which these problems could be referred, the Secretariat had on its own initiative convened an Informal Meeting of Experts on Commodity Intelligence and Statistics in Rome in July 1975. Being unable to deal with many problems itself, the Meeting of Experts had recognized the need for governments' involvement in efforts to improve the intelligence base for hides and skins and had consequently recommended to CCP the convening of an ad hoc Intergovernmental Group on Hides, Skins and Leather Commodity Intelligence and Statistics. Beyond problems of a statistical nature, the Experts had also touched on a number of economic and trade issues in the international hides and skins market, and had noted that, in fact, the intelligence and the more general economic problems appeared to be closely related. In order not to neglect this interdependency, CCP had been asked to consider whether it should not authorize the convening of an ad hoc intergovernmental meeting on commodity intelligence and statistics, as recommended by the Group of Experts. It was also asked to consider whether it would wish to commence an analysis of the more general economic problems of the commodity sector either by the consideration of them as a separate agenda item at its Fifty-First session or, in view of the fact that about a year would elapse before that time, by authorizing the convening of an ad hoc intergovernmental meeting on the subject.

120. The Committee recognized the many problems affecting the hides and skins market and was unanimous in its wish to make a constructive beginning towards solving them. It felt that it was necessary to convene an ad hoc meeting. While several delegates were in favour of confining the terms of reference of such a meeting to statistical problems, excluding the more general economic questions, several other delegates were in favour of extending the meeting's scope to the wider economic problems of the market. A number of delegates also suggested the convening of a separate intergovernmental group to discuss the economic problems. Several delegates felt that the terms of reference of the ad hoc meeting should be restricted to hides and skins and not be extended to manufactures derived from them. Several other delegates felt that the terms of reference would have to be flexible enough to enable the ad hoc meeting to consider all aspects of the problems of hides and skins.

121. Delegates favouring the idea of an ad hoc meeting on statistics felt that the present inadequate intelligence and statistical data base should first be improved in order to permit adequate analysis and identification of the broader economic problems. They considered, therefore that it was important to concentrate initially on the problems of intelligence and statistics. This would facilitate discussion of economic problems at the intergovernmental level at a later stage. Most of these delegates expressed concern that an ad hoc meeting of a general economic nature might well be drawn into discussing problems of manufactures and of synthetics, fields which were the responsibility of UNCTAD's Committee on Manufactures and Permanent Group on Synthetics respectively, and felt that the latter were more suitable fora for dealing with these matters.

122. The representative of UNCTAD emphasized however that so far the activities of UNCTAD and FAO in this commodity sector had been fully complementary. He strongly supported the FAO secretariat's proposal for the convening of an ad hoc meeting on hides, skins and leather and said he felt sure that the eventual establishment of an Intergovernmental Group with the usual terms of reference of such groups within FAO would be welcomed by UNCTAD. The establishment of such a group would not of course preclude further work in UNCTAD or other competent UN bodies in the field of hides, skins and leather but he felt sure that such work would continue to be complementary and mutually supporting.

123. Many other delegates stressed that the improvement of the statistical intelligence base should not be regarded as an end in itself, and that the many pressing economic and trade problems in the international hides and skins sector, particularly insofar as they concerned developing countries, could not await discussion until all the outstanding statistical problems had been solved, particularly as these were likely to be extremely complex and time-consuming. They also observed that the work on statistics, in order to be meaningful, would have to be developed in line with the consideration of the substantive issues involved. These delegates therefore considered that the envisaged ad hoc meeting should also concern itself with general economic and trade problems beyond those of an intelligence and statistical nature, and should also examine the possible role of a regular intergovernmental group on hides and skins. Some other delegates felt that the proposed ad hoc meeting should also examine whether the necessary criteria for the establishment of a regular intergovernmental group on hides and skins would be met.

124. The Committee noted that similar doubts on the questions of manufactures and synthetics had also been expressed before the setting up of Intergovernmental Groups on other non-food products without, however, these having caused in practice any problems of spheres of competence. It was recognized that developments in the market for processed products and synthetics had to be taken into account when analysing the markets for non-food commodities, although it was reiterated and well recognized that FAO Groups should not involve themselves in the problems of these industries per se. It noted also that the terms of reference of other Intergovernmental Groups on non-food commodities took into account manufactures only 'insofar as this was necessary for carrying out their mandate', and that this had proved a sufficient basis for a successful operation of these Groups and even their development of informal international arrangements for the raw materials in questions.

125. In conclusion, the Committee asked the Director-General of FAO to convene an ad hoc meeting in 1976 before the next session of CCP with the following terms of reference:

- to pursue further the work on the improvement of hides and skins intelligence and statistics already begun by the Secretariat;
- to define the economic problems of the hides and skins market and to report to the next CCP on the ways and means by which they could be most effectively dealt with.

The Secretariat expected that this meeting could be handled within its proposed meetings budget for 1976-77 assuming this was approved by the FAO Conference.

126. The delegate of Japan reserved the position of his government on this subject until further instructions had been received.

(iii) Sugar

127. The Committee was informed by the Secretariat that in its assessment, although the likely higher levels of prices meant that future demand would not be as large as earlier expected, it was by no means certain that investment in production would expand sufficiently, especially in the developing countries where most of the growth in demand would occur, and there was a considerable risk of further severe price disturbances. The Committee noted the causes of the recent decline in apparent sugar consumption, which had been mainly concentrated in developed countries, although the largest percentage reductions were in many low income countries dependent on imports. In part, it had been due to destocking by consumers, but actual consumption had also been reduced by the great rise in consumer prices in several major consuming countries and by competition from other sweeteners. Representatives of developing countries emphasized that, while in general they had a great potential for cane sugar production, the expansion of their output would depend mainly on the availability on reasonable terms of investment finance and of inputs such as fertilizers, as well as on remunerative prices.

128. The Committee noted the preparations being made toward the negotiation of a new agreement within the International Sugar Organization and that the FAO Secretariat could, within its terms of reference, contribute to these preparations, for instance, with regard to projections and policy studies. It was important that a new international sugar agreement should be negotiated with prices that would give reasonable assurance to producers in expanding their production and, at the same time, would be fair to consumers.

V. ARRANGEMENTS FOR FIFTY-FIRST SESSION

129. In considering arrangements for its Fifty-First Session, the Committee stressed the need for a flexible approach to the timing and duration of the session itself and to the agenda drawn up for its deliberations. It noted that the most suitable timing would depend on the decisions and conclusions of UNCTAD IV, of the World Food Council, and of other meetings, as well as on the dates scheduled for sessions of the FAO Council and the Committee on Food Security. It also indicated the desirability of holding its sessions immediately preceding or immediately following those of the Committee on Food Security.

130. The Committee considered that adequate forward planning might enable it to shorten its future sessions, provided that the agenda concentrated on a relatively small number of items of substance, but noted that the contents of the agenda, and consequently the duration of its Fifty-First Session, would also depend largely on the follow-up action required by the results of UNCTAD IV and the decisions of the World Food Council.

131. In agreeing to hold its First Session in October 1976, it therefore requested the Director-General, in consultation with the Chairman of the Committee, to take these factors into account when setting the exact dates and when preparing the agenda of the session.

VI. RETIREMENT OF MR. J.W. EVANS

132. The Committee was informed that Mr. John W. Evans, Deputy Director of the Commodities and Trade Division, had retired after 28 years of service with FAO, during most of which he had been closely associated with its activities. The Committee recorded its recognition of Mr. Evans' long and distinguished service, and its appreciation of the great contribution which he had made to the work of the Committee over the years.

APPENDIX A

- I. Adoption of provisional agenda
- II. Review of international action relating to commodities
- III. International strategy for agricultural commodities
 1. FAO's role in international action on agricultural commodities
 2. International Agricultural Adjustment
 3. Future work on commodity projections
- IV. Future activities of the CCP and its subsidiary bodies
 1. Effects of institutional recommendations of the World Food Conference and other considerations concerning the future functions of CCP and its subsidiary bodies
 2. Membership of CCP
- V. Review of world agricultural commodity situation and outlook
- VI. Reports of the Committees's subsidiary bodies and other commodity matters
 1. Reports of intergovernmental commodity groups and sub-groups
 2. Twenty-fifth report of the Consultative Sub-Committee on Surplus Disposal
 3. Report of the Expert Consultation on Cereal Stock Policies relating to World Food Security
 4. Other commodity matters
- VII. Arrangements for the Fifty-First Session
- VIII. Other business

APPENDIX B
ANNEXE B
APENDICE B

LIST OF DELEGATES AND OBSERVERS

LISTE DES DELEGUES ET OBSERVATEURS

LISTA DE DELEGADOS Y OBSERVADORES

Chairman :
Président : G.H. Janton (France)
Presidente :

First Vice-Chairman :
Premier Vice-Président : Salahuddin Ahmed (Bangladesh)
Primer Vicepresidente :

MEMBERS OF THE COMMITTEE/MEMBRES DU COMITE/MIEMBROS DEL COMITE

ALGERIA/ALGERIE/ARGELIA

M. BELARBI
Sous-Directeur
Production Animale
Ministère de l'Agriculture et de la Réforme
Agraire, Alger

S. YAHIA BERROUIGUET
Directeur de l'Agriculture
Wilaya de Mostaganem, Mara

ARGENTINA/ARGENTINE

J. FALDINI
Ministro Consejero Agrícola
Embajada de la Argentina
Roma

J. GARCIA GHIRELLI
Consejero
Embajada de la Argentina
Roma

AUSTRALIA/AUSTRALIE

N.D. HONAN
Director
Bureau of Agricultural Economics
Department of Agriculture
Canberra (c/o Embassy of Australia)

N.C. CARROLL
Minister (Commercial)
Embassy of Australia
Rome

J.D. CHRISTIAN
First Secretary (Agriculture)
Embassy of Australia
Rome

BANGLADESH, PEOPLE'S REP./BANGLADESH, REP.
POP./BANGLADESH, REP. POP.

Salahuddin Ahmed
Permanent Representative to FAO
Embassy of Bangladesh
Rome

BELGIUM/BELGIQUE/BELGICA

H. BAHEYNS
Représentant permanent auprès de la FAO
Ambassade de Belgique
Rome

A. REGNIER
Représentant permanent adjoint auprès
de la FAO
Ambassade de Belgique
Rome

V.R. BOLLENS
Ingénieur agronome
Ministère de l'Agriculture
Bruxelles

J. MARX
Inspecteur en chef
Directeur des Industries Alimentaires
Ministère des Affaires Economiques
Bruxelles

BRAZIL/BRESIL/BRASIL

B. de AZEVEDO BRITO
Permanent Representative to FAO
Embassy of Brazil
Rome

BULGARIA/BULGARIE

J. KOSTOVSKI
Secrétaire commercial
Ambassade de Bulgarie
Rome

CANADA

D.W. WARE
Associate Director
Program Coordination and Development Group
Economics Branch
Ottawa

Miss W.F. WIGHTMAN
Permanent Representative to FAO
Embassy of Canada
Rome

CHILE/CHILI

O. LUCO ECHEVERRIA
Embajador
Embajada de Chile
Roma

G. PONCE
Alterno
Embajada de Chile
Roma

COLOMBIA/COLOMBIE

J.A. GOMEZ
Representante alterno permanente
ante la FAO
Embajada de Colombia
Roma

CUBA

J. ARIAS
Funcionario
Dirección de Org. Internacionales, Mincex
Ministerio del Comercio Exterior
La Habana (c/o Misión de Cuba ante la FAO)

J. GONZALEZ ROJAS
Primer Secretario
Representante Permanente Alterno ante la FAO
Misión Permanente de Cuba ante la FAO
Roma

DENMARK/DANEMARK/DINAMARCA

C. BAERENTSEN
Head of Section
Ministry of Agriculture
Copenhagen

A. VESTEN PEDERSEN
Head of Division
Danish Agricultural Council
Copenhagen

C.F. CARØE
Alternate Permanent Representative to FAO
Embassy of Denmark
Rome

ECUADOR/EQUATEUR

A. DAVALÓS
Embajador
Representante Permanente ante la FAO
Embajada de El Ecuador
Roma

H. CUEVA
Consejero Comercial
Embajada de El Ecuador
Roma

EGYPT/EGYPTE/EGIPTO

M. ASSRAN
Second Commercial Secretary
Embassy of Egypt
Rome

FINLAND/FINLANDE/FINLANDIA

L. KETTUNEN
Professor
Agricultural Economics Research Institute
Helsinki

S. AALTONEN
Research Assistant
Agricultural Economics Research Institute
Helsinki

FRANCE/FRANCIA

G.H. JANTON
Contrôleur d'Etat au Ministère de l'Economie
et des Finances
Paris

P. HALIMI
Administrateur civil
Chef du bureau des organisations
internationales
Ministère de l'Agriculture
Paris

Mlle M. GUYOT
Administrateur civil
Ministère de l'Economie et des Finances
Paris

P. ELMANOWSKY
Administrateur Civil
Ministère de l'Agriculture
Paris

L. HENNEKINNE Loïc
Conseiller des Affaires Etrangères
Ministère des Affaires Etrangères
Paris (c/o Délégation Permanente de la
France auprès de la FAO)

GERMANY, FED.REP./ALLEMAGNE, REP.FED./
ALEMANIA, REP. FED.

Mrs. D. KONIG
Regierungsdirektorin
Federal Ministry of Food,
Agriculture and Forestry
Bonn

G. LIEBER
Alternate Permanent Representative to FAO
Embassy of the Federal Rep. of Germany
Rome

J. KNOTE
Regierungsdirektor
Federal Ministry for Economics
Bonn

R. BOEHNKE
Oberregierungsrat
Federal Ministry of Economic Affairs
Bonn

T. VON LEUCKART
Oberregierungsrat
Federal Ministry for Economic Cooperation
Bonn

GUINEA/GUINEE

J. SYROGIANIS CAMARA
Représentant permanent adjoint auprès
de la FAO
Ambassade de Guinée
Rome

HUNGARY/HONGRIE/HUNGRIA

I. VERECZKEI
Head of Department
Ministry of Agriculture and Food
Budapest

I. RIGO
Commercial Director
Budapest

J. HERR
Head of Section
Ministry of Foreign Trade
Budapest

E. BORBENYI
Head of Section
Ministry of Food and Agriculture
Budapest

G. TOLNAY
Economist
Ministry of Food and Agriculture
Budapest

HONGARY/HONGRIE/HUNGRIA (Cont'd)

Mrs. I. GERGELY
Economist
Institute for Market Research
Budapest

Mrs. M. GALVOLGYI
Economist
Hungarian National FAO Committee
Budapest

INDIA/INDE

B.N. KAPRE
Officer on Special Duty
Directorate of Economics and Statistics
Ministry of Agriculture and Irrigation
New Delhi

ABU HAKIM
Counsellor and
Permanent Representative of India to FAO
Embassy of India
Rome

INDONESIA/INDONESIE

A. ISMET HAKIM
Alternate Permanent Representative to FAO
Embassy of Indonesia
Rome

H. HARINGUN
Economic Counsellor
Embassy of Indonesia
Rome

IRELAND/IRLANDE/IRLANDA

J.J. O'SHEA
Economist
Department of Agriculture and Fisheries
Dublin

ISRAEL

E. DOUEK
Permanent Representative of
Israel to FAO
Embassy of Israel
Rome

ITALY/ITALIE/ITALIA

V. DE ASARTA

Chef du Bureau pour les relations
extérieures
Ministère de l'Agriculture
Rome

Mme I. GATTI

Directeur de Division
Ministère de l'Agriculture
Rome

Mme E.L. MAMMONE

Ministère de l'Agriculture
Rome

G. CORAZZA

Chef du Bureau Etudes et Recherches
IRVAM
Rome

A. MEREU

Fonctionnaire
IRVAM
Rome

G. CALAMITA di TRIA

Fonctionnaire
IRVAM
Rome

S. PERINI

Fonctionnaire
IRVAM
Rome

JAPAN/JAPON

C. NAGATA

Permanent Representative to FAO
Embassy of Japan
Rome

T. SAITO

Alternate Permanent Representative to FAO
Embassy of Japan
Rome

T. SASAKI

Ministry of Agriculture and Fisheries
Tokyo (c/o Embassy of Japan)

K. SHIGETA

Ministry of Foreign Affairs
Tokyo (c/o Embassy of Japan)

KENYA/KENIA

G.K. MBURATHI

Agricultural Attaché
Kenya High Commission
London

KOREA/COREE/COREA

IN-HEE KANG

Agricultural Attaché and
Permanent Representative to FAO
Embassy of Korea
Rome

MADAGASCAR

E. RAVELOJAONA

Conseiller Economique
Ambassade de Madagascar
Rome

R. RALIBERA

Représentant Permanent Adjoint
Ambassade de Madagascar
Rome

MALAYSIA/MALAISIE/MALASIA

MARZUKI NOOR

Second Secretary
Embassy of Malaysia

A. GANAPATHY

Third Secretary
Embassy of Malaysia
Rome

MALTA/MALTE

I. MOSKOVITS

Counsellor of Embassy (Agric.)
Permanent Representative to FAO
Embassy of Malta
Rome

MEXICO/MEXIQUE

Manuel ARMENDARIZ E.

Representante Permanente ante la FAO
Embajada de los Estados Unidos Mexicanos
Roma

Virgilio S. BLANCO

Agregado Agrícola
Embajada de los Estados Unidos Mexicanos
Roma

X. RODRIGUEZ

Representante de la CONASUPO
Delegación Permanente de México
Roma

NETHERLANDS/PAYS-BAS/PAISES BAJOS

A.S. TUINMAN
Minister Plenipotentiary
Permanent Representative to FAO
Embassy of the Netherlands
Rome

J.B. VISSER
Ministry of Agriculture and Fisheries
The Hague

W.A. BASTIAANSE
Senior Officer, Foreign Economic Relations
Ministry of Economic Affairs
The Hague

K.A. de JONG
Associate Permanent Representative to FAO
Embassy of the Netherlands
Rome

NEW ZEALAND/NOUVELLE-ZELANDE/NUEVA ZELANDIA

P.A. OLIVER
Second Secretary (Commercial) and
Alternate Permanent Representative to FAO
Embassy of New Zealand
Rome

NICARAGUA

B. MATAMOROS HUECK
Representante Permanente de Nicaragua
ante la FAO
Embajada de Nicaragua
Roma

NORWAY/NORVEGE/NORUEGA

J.T. HOLVIK
Permanent Representative to FAO
Embassy of Norway
Rome

R. ØYNES

First Secretary
Embassy of Norway
Rome

PAKISTAN/PAQUISTAN

J. SALIM KHAN
Agricultural Attaché
Embassy of Pakistan
Rome

PANAMA

Sra. M. PANIZA DE BELLAVITA
Enviado Extraordinario y Ministro
Plenipotenciario
Misión Permanente de Panamá ante la FAO
Roma

Sra. M. AROSEMENA
Representante Permanente ante la FAO
Embajada de Panamá
Roma

PERU/PEROU/PERU

S. SANTIAGO ARRIOLA
Embajador
Misión Permanente ante la FAO
Embajada del Perú
Roma

PHILIPPINES/FILIPINAS

Florencio A.E. SANTOS
Comercial Attaché
Embassy of the Philippines
Rome

POLAND/POLOGNE/POLONIA

J. RUTKOWSKI
Director of Commodities Department
Ministry of Foreign Trade
Warsaw

SENEGAL

S.M. DIOURY
Ambassadeur
Ambassade du Sénégal
Rome

SIERRA LEONE/SIERRA LEONA

S.A. JABATI
Ambassador and Permanent Representative
to FAO
Embassy of Sierra Leone
Rome

R.E. BARLAY

First Secretary
Embassy of Sierra Leone
Rome

SPAIN/ESPAGNE/ESPAÑA

R. CONTRERAS
Representante Permanente ante la FAO
Embajada de España
Madrid

SUDAN/SOUDAN/SUDAN

SALAH EL HIBIR
Assistant Under-Secretary
Ministry of Finance
Khartoum

AMIR A. KHALIL
Permanent Representative of Sudan to FAO
Embassy of Sudan
Rome

FARID BASHIR TAHER
Agricultural Economist
Ministry of Agriculture
Sudan (c/o Sudan Embassy)

SWEDEN/SUEDE/SUECIA

K.F. SVARDSTROM
Professor
Swedish FAO Committee
Stockholm

Miss I. NORDGREN
Head of Section
National Board of Commerce
Stockholm

R. AKESSON
Head of Section
National Agricultural Marketing Board
Stockholm

H. GRANQUIST
Counsellor
Alternate Permanent Representative to FAO
Embassy of Sweden
Rome

A. ANDERSON
Counsellor
Embassy of Sweden
Rome

SWITZERLAND/SUISSE/SUIZA

M. BESSON
Chef de Section
Division de l'agriculture du Département
fédéral de l'économie publique
Berne

THAILAND/THAILANDE/TAIANDIA

C. CHUTARATKUL
Deputy Under-Secretary of State for Commerce
Ministry of Commerce
Bangkok

N. SRISURAK
First Grade Agricultural Economic Officer
Ministry of Agriculture and Cooperatives
Bangkok

P. LAOWHAPHAN
Permanent Representative of Thailand to FAO
Royal Thai Embassy
Rome

C. ANGPIROJ
Commercial Attaché
Royal Thai Embassy
Rome

TUNISIA/TUNISIE/TUNEZ

A. SAHNOUN
Ingénieur Principal de la Statistique
Direction de la Planification agricole
Ministère de l'Agriculture
Tunis

TURKEY/TURQUIE/TURQUIA

A. SEKIZKOK
Conseiller Commercial
Ambassade de Turquie
Rome

B. DORUK
Agricultural Counsellor
Embassy of Turkey
Rome

UGANDA/UGANDA/UGANDA

T.M. OTHIENO
Deputy Commissioner for Agriculture
Ministry of Agriculture and Animal Resources
Entebbe

UNITED KINGDOM/ROYAUME-UNI/REINO UNIDO

J.C. EDWARDS
Assistant Secretary External Relations
Ministry of Agriculture, Fisheries and Food
London

A.A.W. LANDYMORE
Minister
Permanent Representative to FAO
British Embassy
Rome

P.R. BARNARD
Higher Executive Officer
Ministry of Agriculture, Fisheries and Food
London

J.J.M. EXETER
Expert Adviser
Ministry of Overseas Development
London

UNITED STATES/ETATS-UNIS/ESTADOS UNIDOS
W.F. DOERING

Director, Import Operations Division
Foreign Agricultural Service
Department of Agriculture
American Embassy
Rome

Ch. G. BILLO
Economist
Office of Food Policy
Bureau of Economic and Business Affairs
Department of State
Washington

P.J. FINDLEN
International Organization Affairs
Foreign Agricultural Service
Department of Agriculture
Washington

C. HIGGINSON
First Secretary for FAO Affairs
American Embassy
Rome

URUGUAY
E.M. GALBIATI
Embajador
Representante Permanente ante la FAO
Embajada de Uruguay
Roma

C. BRUGNINI
Representante Alterno ante la FAO
Embajada de Uruguay
Roma

VENEZUELA
F. ALVAREZ YEPEZ
Embajador
Representante Permanente ante la FAO
Embajada de Venezuela
Roma

H.L. CLAVERIE RODRIGUEZ
Representante Permanente Alterno ante la FAO
Embajada de Venezuela
Roma

YUGOSLAVIA/YOUGOSLAVIE/YUGOSLAVIA
D. VUJICIC
Counsellor of the Embassy of Yugoslavia
Rome

ZAIRE
DEMBE KINKELA
Représentant permanent auprès de la FAO
Ambassade du Zaïre
Rome

ZAMBIA/ZAMBIE/ZAMBIA
B.E. PHIRI
First Secretary
Embassy of Zambia
Rome

OBSERVERS FROM MEMBER NATIONS NOT MEMBERS OF CCP
OBSERVATEURS D'ETATS MEMBRES NE SIEGEANT PAS AU CP
OBSERVADORES DE LOS ESTADOS MIEMBROS QUE NO SON MIEMBROS DEL CPPB

AUSTRIA/AUTRICHE

P. ROSENEGGER
Permanent Representative to FAO
Embassy of Austria
Rome

CAMEROON/CAMEROUN/CAMERUN

J.P. KAMTA
Chef de Service Adjoint, Produits d'Exportation
Ministère de l'Economie et du Plan
Yaoundé

CONGO

G. GAMO-KUBA
Représentant permanent auprès de la FAO
Ambassade du Congo
Rome

EL SALVADOR

J.M.D. GARCIA
Representante Alterno ante la FAO
Embajada de El Salvador
Roma

G. CONTRERAS

Representante de El Salvador ante la CEE
Bruselas

C.G. MATTA

Instituto Regulador de Abastecimiento
San Salvador

ETHIOPIA/ETHIOPIE/ETIOPIA

MSMAKU ASRAT
Chargé d'Affaires a.i.
Embassy of Ethiopia
Rome

GUATEMALA

H. VIZCAINO LEAL
Embajador
Embajada de Guatemala
Roma

IVORY COAST/COTE-D'IVOIRE/COSTA DE MARFIL

J. AMBE
Attaché
Ambassade de Côte-d'Ivoire
Rome

JORDAN/JORDANIE/JORDANIA

S. BAK
First Secretary
Embassy of Jordan
Rome

OMAN

A. AL MUKHANI
Attaché
Embassy of the Sultanate of Oman
Rome

PORTUGAL

Mrs. M.J. TORRES
Economist
Embassy of Portugal
Rome

Mrs. L. MEIRELLES

Alternate Permanent Representative
Embassy of Portugal
Rome

RWANDA

A. Kagenza
Premier Conseiller auprès de la Mission
Permanente du Rwanda auprès de la FAO
Paris

SAUDI ARABIA/ARABIE SAOUDITE/ARABIA SAUDITA

A. SUDEARY
Ambassador
Embassy of Saudi Arabia
Rome

TRINIDAD AND TOBAGO/TRINITE-ET-TOBAGO/
TRINIDAD-TABAGO

A. GRAY
Deuxième Secrétaire
Mission Permanente
Genève

PERMANENT OBSERVER FOR THE HOLY SEE
OBSERVATEUR PERMANENT DU SAINT SIEGE
OBSERVADOR PERMANENTE DE LA SANTA SEDE

Mons. A. FERRARI-TONIOLO
Permanent Observer to FAO
Vatican City

REPRESENTATIVES OF UNITED NATIONS AND SPECIALIZED AGENCIES
REPRESENTANTS DES NATIONS UNIES ET INSTITUTIONS SPECIALISEES
REPRESENTANTES DE LAS NACIONES UNIDAS Y ORGANISMOS ESPECIALIZADOS

UNCTAD AND UNITED NATIONS/CNUCED ET NATIONS
UNIES/ UNCTAD Y NACIONES UNIDAS

B.T.G. CHIDZERO
Director
Commodities Division
Geneva

A.R. LAMOND
Chief
General Studies Branch
Commodities Division
Geneva

WFP/PAM/PMA
F.M. USTUN
Director
Resources Management Division
Rome

W.K. DAVIS
Deputy Director
Resources Management Division
Rome

V. MARRAMA
Economic Adviser
Rome

J. MOSCARELLA
Economic Adviser
Rome

INTERNATIONAL BANK FOR RECONSTRUCTION AND
DEVELOPMENT/BANQUE INTERNATIONALE POUR LA RECONS-
TRUCTION ET LE DEVELOPPEMENT/BANCO INTERNA-
CIONAL DE RECONSTRUCCION Y FOMENTO

Miss Sandra HADLER
Economist
Economic Analysis and Projections Department
Washington

GATT/AGAC
M. ØSTERAS
Counsellor
Agriculture Division
Geneva

J. NUSBAUMER
Counsellor
Geneva

EEC/CEE

P. MALVE
Directeur
Direction Générale de l'Agriculture
Bruxelles

G. BRUDERER
Administrateur
Direction Générale de l'Agriculture
Bruxelles

B. SUSSMILCH
Administrateur Principal
Direction Générale de l'Agriculture
Bruxelles

OBSERVERS FROM INTERGOVERNMENTAL ORGANIZATIONS
OBSERVATEURS DES ORGANISATIONS INTERGOUVERNEMENTALES
OBSERVADORES DE LAS ORGANIZACIONES INTERGUBERNAMENTALES

COMMONWEALTH SECRETARIAT/SECRETARIAT DU
COMMONWEALTH/SECRETARIA DE LA COMMONWEALTH
B.J. FERNON
Assistant Director
Commodities Section
London

INTERNATIONAL COCOA ORGANIZATION/
ORGANISATION INTERNATIONALE DU CACAO/
ORGANIZACION INTERNACIONAL DEL CACAO
B.E. ROURKE
Economist
London

INTERNATIONAL WHEAT COUNCIL/CONSEIL
INTERNATIONAL DU BLE/CONSEJO INTERNACIONAL
DEL TRIGO
J.H. PAROTTE
Executive Secretary
London

OECD/OCDE
G. HAYDOCK
Principal Administrator
Agricultural Trade and Markets Division
Paris

INTERNATIONAL VINE AND WINE OFFICE (IWO)/
OFFICE INTERNATIONAL DE LA VIGNE ET
DU VIN (OIV)/OFICINA INTERNACIONAL DE
LA VINA Y DEL VINO (OIV)
P. MAURON
Directeur
Paris

OBSERVERS FROM NON-GOVERNMENTAL ORGANIZATIONS
OBSERVATEURS DES ORGANISATIONS NON GOUVERNEMENTALES
OBSERVADORES DE LAS ORGANIZACIONES NO GUBERNAMENTALES

EUROPEAN COMMITTEE OF SUGAR MANUFACTURERS/
COMITE EUROPEEN DES FABRICANTS DE SUCRE
(CEFS)
COMITE EUROPEO DE FABRICANTES DE AZUCAR
(CEFA)
M. de la FOREST-DIVONNE
Directeur Général
Paris

K.C. SINCLAIR
British Sugar Corporation
London

INTERNATIONAL CONFEDERATION OF FREE TRADE
UNIONS/CONFEDERATION INTERNATIONALE DES
SYNDICATS LIBRES/CONFEDERACION INTERNA-
CIONAL DE ORGANIZACIONES SINDICALES
U. LAMAGNI
Permanent Representative to FAO
Rome

INTERNATIONAL FEDERATION OF AGRICULTURAL
PRODUCERS/FEDERATION INTERNATIONALE DES
PRODUCTEURS AGRICOLES/FEDERACION INTERNA-
CIONAL DE PRODUCTORES AGRICOLAS
Mrs. G. PELA
Liaison Officer with FAO
Rome

INTERNATIONAL FEDERATION OF MARGARINE ASSO-
CIATION/FEDERATION INTERNATIONALE DES ASSO-
CIATIONS DE LA MARGARINE/FEDERACION INTERNA-
CIONAL DE ASOCIACIONES DE LA MARGARINA
I.B. WARMENHOVEN
Agricultural Adviser
Unilever House
Rotterdam

INTERNATIONAL FEDERATION OF PLANTATION,
AGRICULTURAL AND ALLIED WORKERS/FEDERATION
INTERNATIONALE DES TRAVAILLEURS DES
PLANTATIONS, DE L'AGRICULTURE ET DES
SECTEURS CONNEXES/FEDERACION INTERNACIONAL DE
LOS TRABAJADORES DE LAS PLANTACIONES AGRICOLAS
Y SIMILARES
U. LAMAGNI
Permanent Representative to FAO
Rome

INTERNATIONAL UNION OF FOOD AND ALLIED
WORKERS' ASSOCIATION/UNION INTERNATIONALE DES
TRAVAILLEURS DE L'ALIMENTATION ET DES BRANCHES
CONNEXES/UNION INTERNACIONAL DE TRABAJADORES
DE LA ALIMENTACION Y AFINES
U. LAMAGNI
Permanent Representative to FAO
Rome

OBSERVERS FROM NON-GOVERNMENTAL ORGANIZATIONS (cont.)
OBSERVATEURS DES ORGANISATIONS NON GOUVERNEMENTALES (suite)
OBSERVADORES DE LAS ORGANIZACIONES NO GUBERNAMENTALES (cont.)

WORLD CONFEDERATION OF LABOUR/CONFEDERATION
MONDIALE DU TRAVAIL/CONFEDERACION MUNDIAL
DEL TRABAJO

*Mme. A. BARONE

Représentant permanent auprès de la FAO
Rome

WORLD FEDERATION OF TRADE UNIONS/FEDERATION
SYNDICALE MONDIALE/FEDERACION SINDICAL
MUNDIAL

*G. CASADEI

Représentant permanent auprès de la FAO
Rome

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