I. INTRODUCTION

1. The FAO Advisory Consultation on ACP Sugar Policy and Trade was held in Mbabane, Swaziland on 13-14 September 1999, and attended by 79 representatives from ACP governments, signatories of the Sugar Protocol (SP) and the Special Preferential Sugar Agreement (SPS), and from their sugar industries. A list of participants has been appended. The countries represented were Barbados, Belize, Côte d'Ivoire, Congo (Democratic Republic of), Fiji, Guyana, Jamaica, Kenya, Madagascar, Malawi, Mauritius, Saint Kitts and Nevis, Swaziland, Tanzania, Trinidad and Tobago, Uganda, Zambia, and Zimbabwe. The FAO team of experts included Messrs. Kaison Chang (Senior Commodity Specialist from the Commodities and Trade Division of FAO), James Fry (LMC International), Kerry Mulherin (independent consultant), Kaliopate Tavola (Deputy General Manager of Fiji Sugar Marketing), and Michel Wohlgenant (Professor of Economics from the University of North Carolina).

2. The objective of the Consultation was twofold:

- To provide a sound analytical base for complex sugar policy and trade issues, identifying options which would assist in formulating strategies aimed at maintaining and/or improving economic and social welfare gains of these countries; and
- With respect to forthcoming international trade negotiations, particularly the next round of World Trade Organization (WTO) multilateral negotiations, to develop a coherent negotiating strategy, appropriate ideas to minimize the adverse impact of trade liberalization on their countries and proposals to improve efficiency and productivity of the sugar sectors.

II. OPENING REMARKS

3. The Consultation was opened by Mrs Victoria Sekitoleko, the FAO Sub-Regional Representative for Southern and Eastern Africa, on behalf of the Director-General of FAO, Mr Jacques Diouf. She considered it an honour that ACP members had requested FAO to organize the Consultation. She stated that the main purpose of the Consultation was to consider how possible forthcoming changes in the global trading framework might affect the sugar sector and how ACP sugar exporting countries might best deal with many consequential needs for adjustment.

4. The FAO Representative emphasized that the sugar sector was crucial for the social and economic development of the ACP sugar producing countries, which were with very few exceptions among the least-developed and net food-importing group of countries. The sugar industries played a major role in their economies, making a very significant contribution to the development of infrastructure in rural areas, to education, employment, and health and other services, as well as in the servicing of external debt. It was essential that current trading arrangements for ACP countries were not adversely affected without satisfactory compensatory arrangements which should include, inter alia, assistance towards improved competitiveness and where appropriate, product diversification.

5. The FAO Representative reiterated that FAO remained dedicated to supporting a fair and equitable trading system contributing to the improvement of employment opportunities and to increasing incomes of the rural poor. The Plan of Action of the World Food Summit committed FAO and other organizations to continue to assist developing countries on trade issues and in particular to help them prepare for future multilateral trade negotiations so that they might participate as well informed and equal partners in the negotiation process. One initiative had been the establishment of an *Umbrella Programme for Training on Uruguay Round (UR) and Future Multilateral Negotiations on Agriculture.* She invited the ACP countries to take advantage of this initiative.

III. POLICY ISSUES AND CONSTRAINTS IN ACP COUNTRIES

6. The Consultation heard country statements from participants on issues, constraints and policy options with regard to their respective industries.

7. It was evident from the presentations that the sugar industry was of the utmost importance to the economies of the majority of the ACP States. It had firm linkages with several other major economic activities.

8. The sugar industry clearly played a significant part in all aspects of the social and economic life of the States concerned, and the delegations emphasized the need for the survival and strengthening of this vital industry.

9. Participants stressed the absolute imperative that the benefits of the SP and the SPS Agreement be preserved and enhanced. The need for reform and rationalization of the various industries was recognized as essential. Several issues and constraints common to the broad majority of the Sugar Protocol States were highlighted. The major broad areas of concern were as follows:

- high production costs and declining crop yields
- negative pressures on agricultural land use stemming from urbanization
- declining investment due to a sense of uncertainty in the sugar environment
- economic and logistical problems with irrigation
- ageing mills and related operational equipment
- vagaries of weather
- high cost of inland and sea transport
- urgent need for upgrading agronomic techniques, fertilizer use, pest control
- problems related to disposal of mill effluents and solid wastes
- soil erosion which greatly hampered output.

10. The respective States had adopted or expressed a commitment to adopt a wide range of policies to directly address some of these challenges and to meet the overarching objective of improving efficiency and productivity of their sugar industries.

11. To address efficiency and improved productivity, the measures being undertaken included the:

- Rationalization and improvement of factory performance
- Privatization
- Strengthening of agricultural services and upgrading of research and development efforts
- Establishment of national training institutes with a view to national capacity building in all aspects of sugar cultivation and manufacturing
- Adapting appropriate technology in both field and factory
- Investment in irrigation and drainage to counter the effects of adverse weather conditions
- Fiscal and other measures to check the encroachment of urbanization on sugar lands
- Revision of cane payment systems including payment based on quality
- Adopting selective use of mechanization of field operations

IV. OVERVIEW OF THE GLOBAL SUGAR ECONOMY AND MEDIUM-TERM PROSPECTS

12. The outlook for the world sugar market in 1998/99, the Consultation was informed, was for continued oversupply due to production expanding at a faster rate than demand. The supply surplus would add to already high stock levels and was expected to limit any recovery in prices.

13. The weak macroeconomic performance particularly in the major markets, such as the Russian Federation and Indonesia, exacerbated the situation. However, some improvement was expected by 2005.

14. World sugar prices continued their declining trend in 1998/99, with the rate of decline accelerating during the first months of 1999. The year opened with an average WASA price of US cents 8.11 per pound in January, and by the end of April prices had plunged to a 13-year low of US cents 4.78 per lb. World prices declined by more than 35 percent in the first three-quarters of 1998/99.

15. FAO's revised estimate of the world sugar production in 1998/99 was 129.6 million tonnes (raw value), 6.5 percent more than the 126.6 million tonnes assessed for the 1997/98 season. Upward revisions were made to estimates for cane producing countries, mainly Brazil and India, which more than offset the downward adjustments in beet sugar production in the European Community (EC).

16. Cane sugar production was currently estimated at 93 million tonnes, or 72 percent of the global output, while sugar produced from beet was expected to decline further to 36.6 million tonnes.

17. Sugar production in developing countries was estimated to expand by 5.4 million tonnes from 1997/98 to total 87.6 million tonnes or 68 percent of world production. Output in the ACP countries was expected to account for 2 percent of global output. Among developed countries, production was estimated to reach 42.1 million tonnes.

18. World sugar consumption in 1999 was forecast to grow at a slower rate of 1.3 percent to reach 125.6 million tonnes, with developing countries accounting for about 64 percent of the total. Among developing countries, the largest declines would occur in the Far East, due to reduced purchasing power in several major markets as a result of weak economies. Consumption in that region was estimated at 41.1 million tonnes in 1999, 1.2 percent more than the previous year's level but well below the previous 5-year average growth rate of 3.5 percent. Demand in Latin America and the Caribbean was also expected to experience a slower growth rate of below 2 percent, while in Africa consumption was expected to grow by 200 000 tonnes.

19. Disappearance in developed countries was expected to remain at similar levels to 1998, mostly due to dietary habits. A growth rate of 1 percent to 10.4 million tonnes in North America was mainly due to the increase in the United States, currently assessed at 9.1 million tonnes or 23 percent of developed countries' consumption. Europe (dominated by the EC) would account for 44 percent and the Commonwealth of Independence States (CIS - dominated by the Russian Federation), 21 percent.

20. World sugar trade in 1998/99 would continue to be affected by an imbalance between export availabilities and import demand. Availabilities would be expected to remain at about 37 million tonnes and import demand would decline by 5 percent to about 35 million tonnes. In Brazil, competitive export prices following the devaluation of the Real and a policy shift in favour of greater sugar output would result in exports in excess of 8 million tonnes, which would counterbalance lower exports from major exporting countries including the EC. On the importing side, weaker demand was expected from Russia, the United States and China. The resulting oversupply would add about 4 million tonnes to global stocks, which were already high, approaching a level of 50 million tonnes and a stock-to-consumption ratio of 40 percent.

21. As early forecasts for the next season did not indicate a significant variation in world production, prices were expected to largely depend on the economic situations in major importing countries. The current high world stock levels would imply that prices would remain low unless demand was significantly boosted, perhaps by considerable economic growth in the sluggish economies of the major importing countries.

22. In the medium term to 2005, disparate trends in demand and production at national levels, coupled in some instances with increased market access opportunities arising from policy changes in recent years, were projected to give new impetus to international trade in sugar.

23. Among the main exporters, the most substantial increases in trade were projected for Brazil and Cuba. Thailand and Australia's net exports were also projected to be substantially greater, but South Africa would achieve the largest percentage increase (17 percent annually). By contrast the EC –which

was the largest net exporting market during the base years (1993-95) – was projected to cut its net exports by about 2.4 million tonnes over the projection decade to less than 2.1 million tonnes.

24. The bulk of the market opportunities for exporters was expected to be in markets where domestic production could not keep pace with demand. Regionally among developing countries, it was projected that Africa's net imports would increase by 7.3 percent a year followed by the Far East (5.8 percent annually) notwithstanding the increase in Thailand's projected export expansion, and the Near East (3.1 percent). Among developed regions too, some large increases in net imports were projected including in North America with net import growth of 4 percent per year, 5.9 percent per year in the United States alone and 4.1 percent for the former USSR.

25. In terms of policy issues, an earlier study of the Impact of the Uruguay Round (FAO 1995) concluded that the Uruguay Round Agreement (URA) would induce increases in world sugar production, consumption and trade, but the overall effects would be relatively small. Expressed in another way, the scope for reductions in market interventions was potentially still large.

26. In conclusion, the consequences of policy changes in world sugar trade which was subject to preferential arrangements, in particular regarding ACP countries, were highlighted. Already in the decade preceding the conclusion of the URA, the volume of sugar traded under preferential arrangement had declined from about 8 million tonnes to less than 3 million tonnes. Reductions agreed under the URA on tariff rates for both raw and white sugar would generally have the effect of further reducing the value of preferences. However, other aspects of the URA, for example the commitments to reduce the volume of subsidized exports were expected to be of help to preferential suppliers, through impacts on prices in third markets. FAO's latest projections suggested that in the case of the ACP sugar producing /exporting countries, the URA would raise their export earnings. This would be, however, almost entirely a trade volume effect as it was projected that the changes in the prices of preferential and non-preferential sales would be offsetting. In general, for ACP countries, the scenarios explored suggested that export revenues would benefit more from widespread trade liberalization, which would help to support free market prices, than from further liberalization limited only to preference giving countries, which would also have a negative effect on the preference price.

V. REFERENCE MANUAL AND TYPE OF ASSISTANCE PROVIDED

27. The Consultation was advised of FAO's active role since its inception in matters related to international commodity trade as part of its mandate to cover all aspects of food production, consumption, trade and prices. These activities had included advice and support to international negotiations. The FAO Secretariat provided advice to member countries which participated in the UR negotiations, as well as providing technical support to developing countries particularly in regard to decisions on measures concerning the possible negative effects on least-developed countries and net-food importing developing countries.

28. The Consultation was informed that since the conclusion of the UR, FAO had undertaken a number of technical assistance activities including regional workshops and national training seminars related to the impact of the Round and the need for follow-up action. In order to assist developing countries in preparing for the forthcoming new Round of Negotiations, the FAO Secretariat had initiated an "Umbrella Programme for Training on Uruguay Round and Future Multilateral Trade Negotiations on Agriculture".

29. To date, the programme had involved the preparation of training modules, examining the implications of the URA, and indicating issues which might be likely to arise in the course of the "Millennium Round", particularly those of concern to developing countries. For the present Consultation, the FAO Secretariat had compiled a reference guide incorporating selected extracts from the thirteen modules so far prepared. Three in particular dealing with "Continuing the Reform Process in Agriculture", "Special and Differential Treatment" and "Tariff Rate Quotas" were reproduced in full. The reference guide also included an annex providing tariff rates for sugar and the UR commitments in selected ACP countries.

VI. PRODUCTION AND COMPETITIVENESS OF ACP COUNTRIES

30. The Consultation noted that one of the problems that would face ACP sugar producers as the benefits of their preferential arrangements in the EC erode, would be the declining long-run trend in the real world price of sugar. The real price of sugar had been declining at an average rate of 1.5 percent over the period since 1950. This phenomenon was common to agricultural products, virtually all of which had a sharper rate of decline.

31. When the trend in world prices was compared with that in world cane sugar production costs, it was discovered that the two had moved in parallel since the mid-1980s. This suggested that, in the long run, cane sugar production operations with lower costs than the average world-wide would be profitable. Those with higher than average costs would be unprofitable in the long run.

32. The average costs of production of ACP producers were similar to those in the world as a whole. However, whereas both African and Pacific ACP producers had typically recorded costs below the long-run trend in world prices, the costs of production of Caribbean ACP producers had been well above the trend.

33. Unfortunately, none of the three ACP regions had managed to reduce its real production costs since the late 1980s. Also, within the ACP group of producers, the range of production costs was much greater than in the world at large.

34. Comparing cane and beet white sugar production costs in the world, it was discovered that cane sugar was consistently the more competitive of the two.

35. On the technical side, African ACP producers enjoyed high cane yields per hectare per annum by world standards. Caribbean and Pacific ACP states' yields were close to the global norms.

36. The sucrose content of Caribbean ACP sugar output was well below that in the other ACP regions. Combining sucrose with cane yields left the Caribbean and Pacific ACP producers behind most other leading suppliers, including African ACP producers.

37. All three regions of ACP producers had small average mill sizes by world standards. Those in the Caribbean were the smallest of all.

38. Factory recoveries in the ACP regions were fairly close to the world average. One respect in which the ACP nations compared poorly with other producers was in the amount of sugar that they produced annually from each tonne of daily crushing capacity.

39. Among the main conclusions were:

- Cane quality and mill recovery rates needed to be improved, particularly in the Pacific and Caribbean regions.
- The average mill size should be increased and the utilization of the installed capacity should be raised.

VII. POLICY SCENARIOS FOR FUTURE NEGOTIATIONS

40. The Consultation considered the implications of various trade policy scenarios on the world sugar market and developing and ACP countries. The various scenarios were estimated using a detailed economic model of the world sugar economy (supply/demand relationships for 42 countries/regions). The scenarios included the impact of:

- URA to 2000,
- continuation of the URA to 2005 (without any other policy changes),
- global trade liberalization (uniform elimination of tariffs across countries) with EC preferences and USA quota remaining in effect,

- partial trade liberalization (20 percent uniform reduction in tariffs across countries) with EC preferences and USA quota remaining in effect,
- complete trade liberalization in developed (industrialized) countries only,
- partial trade liberalization in developed countries only,
- complete trade liberalization in major developing countries (Brazil, China, Indonesia, and Republic of Korea) only, and
- effects on ACP and developing countries of complete and partial elimination of EC preferences and United States Tariff Rate Quota (TRQ).

41. The impact of the URA was expected to raise the world sugar price by 7 percent compared to no change in tariffs (equivalent to saying that the world sugar price would be 7 percent lower without URA). With the continuation of the URA to 2005 (no changes in current policies), the price was projected to decline by 3 percent in real terms from 2000. With complete global trade liberalization (uniform elimination of tariffs across countries), the world sugar price would increase by 43.2 percent compared to the baseline of continuation of the URA through 2005. The reason the world price would rise was because consumption would increase in many countries because of lower internal prices, hence stimulating world import demand. The USA, Japan, and India would exhibit the largest increases in imports as a result of global trade liberalization because of relatively high consumer response to price changes in those countries. With the world sugar price around US cents 6.5 per pound, this means complete trade liberalization could raise the world price to a little over US cents 9 per pound from its present level. This would not, however, necessarily prevent the long-term secular decline in sugar prices, but would rather represent a once and for all increase in the world price as a result of eliminating trade distortions.

42. With partial global trade liberalization, prices would increase 6.2 percent compared to the baseline for 2005. With complete trade liberalization in industrialized countries, price would increase 9.8 percent in developed countries and 16.7 percent in developing countries. However, partial trade liberalization prices would remain relatively unchanged. As in the case of complete global trade liberalization, the price changes would be once and for all and would not necessarily affect the secular decline in sugar price witnessed in the past several decades.

43. ACP countries as a group could gain from trade liberalization only if there were complete or partial global trade liberalization across all countries, and under complete or partial trade liberalization in major developing countries (in all cases with preferences and TRQ remaining in effect). The reason this would occur was because, under either global unilateral trade liberalization or unilateral trade liberalization in the major developing countries, the EC internal price would not be eroded because of relatively higher protection rates in other countries, a reduction of which would have had dramatic effects on the world price. ACP countries would suffer price erosion under all other scenarios. Export earnings would fall by 7 percent and 18 percent, respectively, with partial and complete elimination of EC preferences and the United States TRQ. The greatest price decline would occur if trade were completely liberalized in the developed countries only, about 29 percent, but not in developing countries.

44. How individual ACP countries would be affected by trade liberalization would depend upon their reliance on preferential and TRQ arrangements as well as on their initial levels of protection. Countries with more dependence on the EC and USA markets and with higher levels of protection would be more likely to lose under all the scenarios. Those countries whose levels of protection were below that of the average of all ACP countries would experience gains and losses similar to that of the ACP countries in the aggregate. Clearly those countries that were more dependent on EC and USA markets would be more vulnerable to trade liberalization where there was price erosion in the EC and USA markets.

45. Removal of trade barriers within common trading areas (e.g., NAFTA, MERCOSUR, APEC, and ASEAN) could adversely affect exports of ACP countries. Full implementation of NAFTA by 2008 could limit access to the United States market by ACP countries. If Mexico expanded its exports to the United States and the United States retained its current TRQ system, then Mexico could displace some ACP suppliers.

46. The four main conclusions of the study were as follows:

- ACP sugar exporting countries would likely continue to experience price erosion, even if preferences and the TRQ were maintained.
- Trade liberalization would have to be substantial and across all countries with preferences maintained in order for the ACP countries to benefit.
- Regional free trade areas, especially NAFTA, posed a threat to the competitive position of ACP countries and could lead to further price erosion.
- ACP countries could benefit from further trade liberalization in the major developing countries (especially China and India), but they would lose if only industrialized countries (especially the EC and USA) liberalized trade.

VIII. NEGOTIATION STRATEGIES

47. The Consultation received a paper which identified the value to the ACP Group of the SP and the SPS Agreement of the Lomé Convention. It assessed the implications for the Group's respective sugar industries and economies of possible changes in these arrangements as a result of future trade liberalization negotiations.

48. Six areas were identified where the Group's interest in SP and the SPS was likely to be affected, and a series of suggestions on preparing for these negotiations and developing relevant strategies was put forward. The identified areas of negotiation were:

- The current negotiation for a successor agreement to Lomé IV;
- The negotiation in Geneva at the WTO whose objective is to extend the current waiver on the Lomé Convention or to actually negotiate a new waiver on the successor Convention;
- The negotiation which will start in 2000 for an Alternative Trade Arrangement (ATA) which will essentially comprise the substantive trade chapter of the successor agreement to Lomé IV;
- The continuation of the reform process under Article 20 of the WTO Agreement on Agriculture, which will start properly in 2000;
- The reform of the Common Agricultural Policy as it relates to the Sugar Regime of that Policy; and
- The negotiation for the extension of the SPS Agreement in late 2000/early 2001.

49. Within each of these areas there were important objectives to be achieved, and they were summarized as follows:

- In the current negotiation for a successor agreement to Lomé IV, the objective was to keep the SP and the SPS from being involved in the negotiation because they were not on the agenda of the negotiation. Whilst that was so, the Group still needed to monitor the negotiation, especially as it related to discussions on the ATA that would be preferred by both the ACP Group and the EC. Even though the negotiation on the ATA would begin in 2000, there would be discussions in the current negotiation on how best to reflect an ATA in the general framework agreement, which would have to be concluded and signed before the negotiation on the ATA started. The ATA would form the substantive trade chapter of the successor agreement to Lomé IV and would thus provide the essential framework, which would accommodate the SP and the SPS Agreement.
- On the WTO waiver for the new Convention, it was anticipated that this new Convention would still contain preferential trade arrangements, and as such the new Convention would still need to derogate from WTO principles especially Article 1 of GATT. The waiver was the mechanism whereby such derogation could be obtained. It could be envisaged therefore that any waiver on the Convention might essentially be a waiver for the SP and the SPS. The Group needed to be active in Geneva in the negotiation for the waiver.
- For any ATA for the new Convention, it was essential that the SP and the SPS Agreement be accommodated. During the passage of this negotiation, the Group had to seriously address the erosion of its preferential margins offered by these market access mechanisms, and to focus on devising proposals that could be traded off against such erosion. These proposals needed to address enhancement of the Group's competitiveness, viability and sustainability.

- The continuation of the reform process under Article 20 of the WTO Agreement on Agriculture would see further erosion of the Group's preferential margins as a result of anticipated additional reduction in tariffs (market access), domestic support and export subsidies. The Group could obviously work to slowing down the rate of liberalization, and it would be justified in doing so. This way, it could act to protect its interest under the SP and the SPS Agreement. However, it would still be necessary to accept the reality of the global trading situation, and especially the reality of the erosion of preferential margins, and to focus increasingly on the restructuring of industries, through measures aimed at increasing competitiveness, viability and sustainability.
- The SPS Agreement would expire at the end of June 2001. The Group proposed to seek the extension of this Agreement since it had realised immense benefit to its signatories. The Group therefore would need to begin soon its preparation for the negotiation that would start towards the end of 2000. Good preparation was essential considering that this Agreement was usually regarded to be more vulnerable than the SP.

50. The Consultation took note of this presentation before discussing its position and the proposals to be submitted to the ACP Sugar Ministers in terms of conclusions and appropriate strategies.

IX. RECOMMENDATIONS OF THE CONSULTATION TO THE ACP SUGAR MINISTERS

51. The summary record of the Consultation and its recommendation, on negotiating strategies were presented to the ACP Sugar Ministers at their 6th Special Meeting and were adopted in full. Furthermore, the Ministers recommended that these be included in their Action Plan for upcoming WTO and SP negotiations.

X. VOTE OF THANKS

52. The participants expressed their appreciation to FAO for sponsoring the Consultation, which they found valuable. Furthermore, they expressed their desire for further collaboration in sugar. They recommended therefore that the Subcommittee on Sugar should pursue measures to develop such collaboration with FAO in the future.

APPENDIX

LIST OF PARTICIPANTS

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