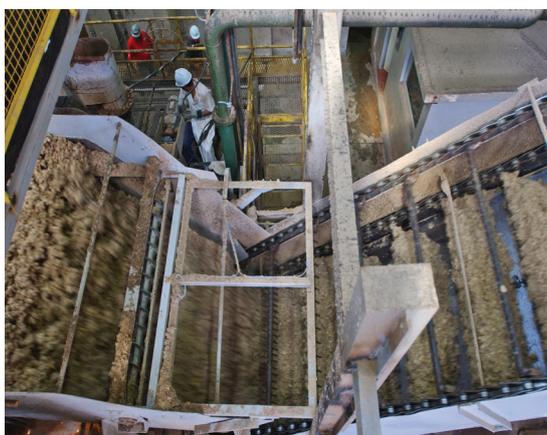

FIJI / FAO
2012 ASIA PACIFIC
SUGAR CONFERENCE



21 – 23 AUGUST 2012
WESTIN RESORT & SPA
DENARAU, FIJI ISLANDS

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CONFERENCE PROGRAMME

THE FOURTH FAO INTERNATIONAL SUGAR CONFERENCE SUGAR POLICIES TO PROMOTE TRADE, DEVELOPMENT AND GROWTH: PRIORITIES TO FACE FUTURE CHALLENGES – NADI, FIJI 21-23, August 2012

Approach

The conference reviews the successes and failures of previous sugar policies and from the lessons learnt consider the challenges that lay ahead viz.:

- Supply;
- demand;
- trade;
- competition with other sources of sweeteners and energy;
- competition for resources (land, water, etc.);
- technology;
- investment.

The review and ensuing discussions will help in defining the major priorities required to strengthen the contribution of the sugar sector to economic growth and development.

TOPICS AND SPEAKERS

TUESDAY, 21 AUGUST 2012

OPENING

8:30 Opening/Keynote address: Prime Minister of Fiji

9:00 FAO Keynote Address : FAO

GLOBAL OVERVIEW

9:30 Market Outlook and Overview of Sugar Policies - Food and Agriculture Organization of the United Nations

10:00 The Fiji Sugar Industry - Governments response to the Crisis and Vision for the future of the Industry - Mr. Manasa Vaniqi, Permanent Secretary Ministry of Sugar

10:30 Coffee break

11:00 Market Challenges (overview): Enabling Policies to Meet These Challenges - Mr. Lindsay Jolly, Senior Economist, International Sugar Organization

11:30 Market Opportunities and Challenges: Trade Perspective - Mr. John Ireland, Czarnikow Group

12:00 Lunch

Afternoon session

IMPACT OF MAJOR POLICY DEVELOPMENTS

14:00 ACP Perspective on the Implementation of EPA/EBA Sugar Arrangements - Mr. Nidhendra Singh, Chairman, ACP Sugar Working Group

- 14:30 Future Perspectives for the ACP Group – The Ambassadorial Working Group on the Future Perspectives of the ACP Group
- 15:00 The Interaction Between the European Union's Domestic Policy for Sugar and its Imports of Sugar from the ACP and Least Developed Countries – Mr. David Roberts, Former Sugar Policy Analyst of the European Commission
- 15:30 Coffee break
- 16:00 Brazil: Enabling environment to sustain its premier position in the World Sugar Economy – Mr. Alexandre Rands Barros, Professor of Economics, Recife University, Brazil
- 16:30 Impact of Australian Sugar Policy on the World Sugar Economy – /Mr Aaron Aldenton, Manager, Sugar Marketing QSL, Australia
- 17:00 Impact of Indian Sugar Policy on the World Sugar Economy

WEDNESDAY, 22 AUGUST 2012

- 8:30 Impact of Thailand's Cane and Sugar Policy on the World Sugar Economy –Mr. Rangsit Hiangrat, Director, Cane and Sugar Policy Bureau, Office of the Cane and Sugar Board, Thailand
- 9:00 Impact of SADC Sugar Policy on the World Sugar Economy - Dr. Mike Matsebula, Chairman of SADC Sugar Producers Consultative Forum
- 9:30 Strategic Policies to enhance smallholder Livelihood – FAO

CASE STUDIES

- 10:00 The Fiji Sugar Corporation: Its Problems, Challenges and Future Prospects – Mr. Abdul L. Khan, Executive Chairman, Fiji Sugar Corporation
- 10:30 Coffee break
- 11:00 Sustainable Land Management in the Sugar Sector - Mr. Inoke Ratukalou, Director, Secretariat of the Pacific Community (SPC).
- 11:30 Impact of Biofuel Feedstock on sugar prices – FAO to lead the discussion
- 12:00 Lunch

Afternoon session

CASE STUDIES (Contd.)

- 14:00 EU Commission CAP Reform Proposals: A threat to ACP suppliers and EU cane refiners? – Mr Ian Bacon, President, Tate & Lyle Sugars
- 14:30 Determinants of Revenue Growth in the Sugar Sector: FAO case study on Ethiopia and Tanzania - Food and Agriculture Organization of the United Nations
- 15:00 The Causes and Effects of the Low Adoption Rate of Technology in Sugar Cane Production – Mr. Alcides Leao, Professor of Science and Technology, University of Sao Paulo, Brazil
- 15:30 Coffee break
- 16:00 Discussion and priority setting – Plenary

Conference Declaration

THURSDAY, 23 AUGUST 2012

Field Visit

Message from the Director General of the Food and Agriculture Organization of the United Nations

Agricultural production will have to expand by at least 60 percent to meet the food demand of the world population which is expected to reach 9 billion by 2050. However, increasing the production, even if done in a sustainable manner, to meet this demand does not necessarily translate to food security. It is necessary to ensure that those who suffer from hunger, the vast majority of whom live in rural areas, have the means to access the food they need to live a healthy and productive life.

The sugar sector has long played an important role for millions of rural households across the world, as a source of employment and income generation. Sugar is one of the most important agricultural commodities traded internationally. The value of world sugar trade exceeds USD 24 billion annually, of which developing countries account for more than 80 percent, underpinning the impact of the sector on the livelihood of sugar farmers, many of whom are smallholders.

Recent global sugar trends show that the sector has suffered underinvestment at both factory and farm levels, evidenced by the fact that world sugar production was not able to keep pace with the fast growth in consumption over the last 10 years, leading to a draw down in sugar reserves to historical lows. In fact, world sugar stocks fell to their lowest level in 20 years in 2010-2011.

In addition, amid rising demand for biofuel, as a supplement to transportation fuels, the production of sugarcane-based ethanol has grown significantly over the last decade. It is estimated that in 2012, at the global level, about 20 percent of sugarcane production is used for the production of ethanol. Biofuel offers sizeable opportunities to the sugar sector, but it also raises great challenges to our global food system. Where sugarcane competes for arable land and water, it puts additional strain on our already scarce supplies of productive resources, thereby contributing to the upward pressure on food prices. As illustrated by the FAO Food Price Index, food prices increased by 79 percent between 2006 and 2011, and they are now back on the rise prompted by the prospects of tight grain supplies. However, where sugarcane does not compete directly for resources with food crops, biofuel can yield positive net effects, as it develops rural communities, provides environmental benefits, and lowers a country's exposure to oil price volatility.

Still, realizing the full benefits of biofuels entails better policies. Large and generous tax credits for blenders, tariffs on imported biofuels, and agricultural support for grain producers create distorted global biofuels market, which hinders low-cost sugarcane-based ethanol producers from competing on a level playing field. Clearly, biofuel policy reforms are needed to alleviate some of the risks that prevent greater investment in the sugar sector.

These structural trends are likely to influence the sugar industry beyond the next decade and have significant implications for sugar producers in developing countries.

FAO closely monitors and assesses international commodity developments and the effects of policy changes on prices and trade. In line with its vision and global goals, the Organization will continue to assist developing countries, through, inter alia, the provision of data and information, studies, analyses and capacity building, with the objective of strengthening commodity sectors. Recognising the critical role that sustainable agriculture

plays in combating hunger, reducing poverty and improving smallholder livelihoods, it is hoped that this Fourth International Sugar Conference will provide a forum for sharing experience and ideas to improve the efficiency of the sugar sector and its role as a genuine vehicle for sustainable economic growth and development.

José Graziano da Silva
FAO Director-General

ABSTRACTS

Market Outlook and Overview of Sugar Policies

By

Food and Agriculture Organization of the United Nations

The presentation examines both the current and medium-term prospects for production, consumption and trade of sugar and the likely impact on the world market. It explores key market factors likely to impact on the sugar market and potential effect on international prices and trade. The presentation draws from the recent medium-term outlook for sugar developed by the OCED and FAO. The outlook foresees that volatility in sugar market will persist in response to production shocks in major producing countries, and a persistence of historically low levels of global stocks. Market volatility will also reflect the continuing production cycles in India and some neighbouring countries of Asia, government policies that intervene in sugar markets and volatile world energy markets. The presentation will also discuss the policy framework which sets the scene for the more detailed papers to follow. Sugar policy reforms have largely been directed at the supply side where instruments have been introduced to reduce inefficiencies and enhance competitiveness of producing countries. Among smaller producers, rationalization of the industry, diversification and exit strategies were explored for their macro-economic impact. Recent policy developments have seen virtually unchanged sugar policy in the United States (US). Essentially the US Sugar Program created an incentive for sugar producers in the United States to expand domestic production, which has in turn resulted in import levels at or near the minimum access agreement. In the European Union (EU) reform of the sugar regime by the European Commission (EC) included the abolition of intervention prices and the introduction of reference prices and decoupled payments; merging of A and B quotas and an overall reduction in the production quotas; and a modification of the import regime for the Western Balkans. The reform led to a cumulative fall in domestic sugar price. As for international trade policies significant developments occurred in developing countries and the EU. In developing countries market access increased with commitments under the Uruguay Round, and in the EU the Everything But Arms (EBA) initiative was introduced in 2001 and came in to full effect in 2009/10. The EBA enhances market access by Least Developed Countries (LDCs) at the expense of ACP quota holders. In other words, there was no net gain in market access to the EU, but a redistribution of the SPS quota.

Market Challenges (overview): Enabling Policies to Meet These Challenges

By

Lindsay Jolly

(Senior Economist, International Sugar Organization)

ACP/LDC sugar industries embrace a wide range of production systems over a large spectrum of agro-climatic conditions, socio-economic conditions and ownership structures. Sugar is sold into growing domestic markets, with some countries also enjoying sales into high-priced regional markets. There are also important export markets, including sales to the EU and the United States, which under preferential trading arrangements typically offered higher prices than the world market. There's also a multiplicity of overlapping trade agreements impacting sugar producers, particularly in Africa, presenting significant challenges and opportunities for the future.

The diverse ACP/LDC sugar industries face key market challenges over the next decade:

- How much potential for expansion can be realised in the Caribbean and in Asia-Pacific?
- Can ACPs/LDC's fully utilise installed milling capacity and lower production costs?
- Are ACP's/LDC's able to diversify into green energy and green biochemical opportunities?
- How to maximise opportunities and meet challenges from regional and international trade policy, especially with the EU looking at vigorously reshaping the sugar regime by 2015.
- The outlook for third country supplies to the EU sugar market is crucial.
 - o Post 2015: abolishment of quotas means competitiveness of beet sugar against imported cane sugar (and domestic isoglucose production) is paramount.
 - o The world price level determines whether imports for ACP/LDCs can compete with domestic beet sugar: if world prices are low, then EU refiners will likely offer a preference (price premium) to ACPs/LDC's
 - o More generally post 2015 ACPs/LDCs will face a more volatile trading environment in the EU.

In this presentation these challenges and opportunities are investigated with a view to better understanding enabling sugar policies in a broad context within the diverse ACP/LDC industries.

Market Opportunities and Challenges: Trade Perspective

By

John Ireland

(Czarnikow Group Limited)

The Fiji sugar industry has always been driven by its export trade activities, with just 10%-15% of production typically being used for domestic and regional consumption. Consequently, opportunities from trade and facing down the challenges posed by a volatile and competitive market environment, are central to realising the full potential of the Fijian sugar industry.

While the European Union has long been the most significant destination for Fiji sugar, Fiji has always been a very strong regional player with significant exports going to Japan and other Asian markets, while of course Fiji also benefits from preferential access to the USA.

Looking ahead, opportunities for the Fiji sugar industry will continue to come from preferential market access, though significant challenges will be faced by shifting policy agenda, particularly in the EU. Given inevitable policy change and the increased market volatility that will likely accompany it, future opportunities and sustainable growth may well also come from embracing regional opportunities and from diversified revenue streams.

ACP Perspective on the Implementation of EPA/EBA Sugar Arrangements

by

Nidhendra Singh

(Chairman, ACP Sugar Working Group)

As of 1 October 2009, the ACP-EU Sugar Protocol has been superseded by the Economic Partnership Agreements (EPAs) between the European Union and the various ACP regional configurations. Under the EPAs, market access opportunity for sugar is offered to all ACP sugar exporters, both Least Developed Countries (LDCs) and non-LDCs, parties to EPAs. However, non-LDC ACP countries will be subject to double trigger safeguard thresholds. During the transition period, 1 October 2009 to 30 September 2015, a system of duty-free access was established for the ACP sugar subject to an automatic volume safeguard clause. The safeguard will only be applied to ACP non-LDCs and triggered by volume based on a double trigger mechanism, that is, it would be applicable when two conditions are met:

- Total imports from ACP countries (LDCs and non-LDCs) reach 3.5 million tonnes; and
- Imports from ACP non-LDCs reach 1.38 million tonnes in marketing year 2009/2010 and progressively increasing to 1.6 million tonnes in 2011/2012 marketing year to the end of the current regime in 2015.

The presentation will examine the performance of the suppliers under the EPAs and Everything But Arms Initiative (EBA) under the new EU sugar arrangements and future prospects.

Future Perspectives for the ACP Group

By

The Ambassadorial Working Group on the Future Perspectives of the ACP Group

The African, Caribbean and Pacific (ACP) Group of 79 (soon to be 80 with South Sudan) developing countries comprises a unique intergovernmental, transcontinental organisation with a proud history of 36 years of political advocacy, dialogue and tangible benefits from trade, economic and development cooperation among themselves and with the world's second largest trading bloc of the European Union. Founded by the Georgetown Agreement of 1975 with subsequent Lomé and Cotonou Agreements with Europe, the latter of which ends in 2020, the ACP Council of Ministers in November 2010 approved the setting up of an Ambassadorial Working Group on "Future Perspectives for the ACP Group" with a mandate to 2014. This will be in preparation for the 3rd and final 5-yearly review of the Cotonou Agreement. The ACP is now engaged in an extensive and inclusive process with various stakeholders to appraise its core business: reducing and eventually eradicating poverty consistent with the objectives of sustainable development and gradual integration of ACP countries into the global economy. The presentation will outline key issues of trade and development cooperation being addressed and explore options the ACP Group may consider as it assumes a prominent role in South-South and Triangular Cooperation on behalf of the Global South.

The Interaction Between the European Union's Domestic Policy for Sugar and its Imports of Sugar from the ACP and Least Developed Countries

By

David Roberts

(Former Sugar Policy Analyst of the European Commission)

From the signing of the Commonwealth Sugar Agreement in 1951 until the end of the ACP Sugar Protocol in 2009, Fiji and certain other developing countries enjoyed a guaranteed market in Europe for specified quantities of sugar. Since the ending of the protocol the ACP countries who have negotiated Economic Partnership Agreements (EPAs) or interim EPAs have continued to enjoy tariff free access to the European Union (EU) market and have not suffered any loss as a result of the loss of their guaranteed market, because the EU had been short of sugar. But this situation may soon change. The current quota regime, which restricts the volume of sugar EU producers can sell on the EU market, expires at the end of October 2015 and, in their proposals for the future of the Common Agricultural Policy up to 2020, the Commission have not proposed to extend it. If the quota regime expires, EU and ACP sugar suppliers will, for the first time, be in open competition. The reasons for this, the EU legislative process that is now beginning and the possible consequences for the ACP sugar suppliers are examined.

Brazil : Enabling environment to sustain its premier position in the World Sugar Economy

By

Alexandre Rands Barros

(Professor, Federal University of Pernambuco, Recife-PE, Brazil)

and

Carlos Magno Lopes

(Professor, Federal University of Pernambuco, Recife-PE, Brazil)

Brazilian sugar industry has grown fast last few years and still has perspectives of further expansions next years. Market perspectives for alcohol, which can substitute gasoline at current Brazilian domestic prices, were the major cause for such expansion. Public policies, actually, did not have any relevant contribution on the recent spur, as the sector continues to be proportionally more penalized by the public sector than other large scale primary production in Brazil. Therefore, its long term perspective is mainly determined by oil prices and points to further expansion.

Impact of Thailand's Cane and Sugar Policy on the World Sugar Economy

By

Rangist Hiangrat

(Director, Cane and Sugar Policy Bureau, Office of the Cane and Sugar Board, Thailand)

The Cane and Sugar Industry is among Thailand's major economic sectors which play a very important role in the country's economic and social development. About two hundred thousand families of farmers and more than one million people are involved in the industry. It does not only create employment in various ancillary activities, but also contributes to renewable sources of energy.

Thailand has been supplying the world with sugar for more than 70 years and has deserved the SUGAR BOWL OF ASIA due to its strategic location to supply its abundant sugar to the main consumers in Asia. The country exports 6 to 7 million tons of sugar annually, earning a place as the world's leading sugar supplier, second only to Brazil.

The Thai government has placed its priority to the development of the sugar industry. Improvement of product quality, and productivity at farms and factories, logistics and export management as well as the fair sharing of benefits between farmers and millers, all are monitored to ensure the industry's sustainable growth and secure sugar supply for customers. The country's national policy well reflects the following mission:

- Stabilize local cane and sugar prices to ensure fairness for all – the sugarcane farmers, sugar millers, and the consumers.
- Secure sugar supply to meet the local demand both for direct and indirect consumption.
- Promote diversification into co-generation, bio-energy, and chemical industries in order to bring additional revenue streams to the sugar sector.
- Sustain the industry's growth and increase its competitiveness in the world market as well as maintain Thailand's position as major sugar supplier in Asia and other regions.

The 2011/2012 crop year is a very significant year for Thailand as the sugar production is at an all time record of 10.24 million tons. This achievement has resulted in a historic milestone for the development of the country's cane and sugar industry.

Impact of SADC Sugar Policy on the World Sugar Economy

By

Mike Matsebula

(CEO of the Swaziland Sugar Association and Chairman of the SADC Sugar Producers Consultative Forum)

Out of the fourteen countries belonging to the Southern African Development Community (SADC), nine are sugar producers. The movement of goods and services is governed by a Trade Protocol to which is annexed a special dispensation dealing with sugar. This special dispensation has two dimensions – namely, market access and areas of cooperation designed to promote equitable development of the sugar industries. This dispensation is considered to be a rational instrument in the light of the strategic role played by sugar industries in their different SADC economies, given the distortions (in the form of trade and non-trade barriers) surrounding various sugar markets in the world.

The SADC region is a net surplus producer (i.e., production exceeds consumption), with its sugar producers being relatively cost competitive and higher yielding compared to the rest of the world. The paper will analyse sugar production and trade within SADC as well as sugar trade patterns between SADC and various countries in the rest of the world. To enhance their sustainability, the SADC sugar producers have compiled a regional sugar strategy whose main thrust is improving cost competitiveness and foreign market access. This strategy is consistent with the draft SADC Regional Agricultural Policy.

The Fiji Sugar Corporation: Its Problems, Challenges and Future Prospects

By

Abdul L Khan

(Executive Chairman Fiji Sugar Corporation)

The Fiji sugar cane industry, like a number of such industries throughout the world has to deal with real challenges, most notably adjustment following the post European Union price reduction. Fiji Sugar Corporation has been affected in many ways, including capital constraints, lack of incentives for investment, and capital asset renewal. Although an attempt was made to modernise and upgrade three mills, the result has been so far unsuccessful.

As the only processor in the country, Fiji Sugar Corporation's survival is critical. Faced with inefficient manufacturing and revenue reduction, the company has reached a point of insolvency. Since the industry plays a major part in the economy of Fiji, the Government of Fiji took the lead role of re-vitalising the industry and assisting Fiji Sugar Corporation with its financial re-engineering through direct injection of over USD 130 million. The Government also engaged Deloitte to provide a roadmap for the industry and this report is being used as the framework to improve the physical and financial aspects so that the sugar cane industry can again be commercially viable in the long term.

Faced with these challenges, Fiji Sugar Corporation started its journey in 2011, by taking a more holistic approach to the industry. It did so by focusing on three main elements: raw material, processing and revenue. The presentation will analyse each of these elements, discuss benefits to stakeholders, especially for the Fiji Sugar Corporation and the sugar cane farmers

Sustainable Land Management in Fiji's Sugar Sector

By

Inoke Ratukalou

(Land Resources Division, Secretariat of the Pacific Community PMB,Suva)

The need to practice sustainable land management and to find concrete actions to reduce risks, vulnerability and increase resilience of sugar cane land ecosystems is vital for the sustainability of the sugar industry. Sugar cane development underpins economic growth in Fiji since its introduction in 1880 and it provides particularly significant contribution to employment, income and foreign exchange earnings. While dependence on the sugar industry has declined substantially during the last two decades currently it still accounts for up to 7% of the gross domestic product(GDP), 25% of employment and approximately 22 % of the annual export revenue and approximately 90% of Fiji's raw sugar is exported to international markets. Sugar development has undergone immense changes in Fiji due mainly to population pressures, urbanization and social and economic changes. The expansion of sugar cane development into marginal lands, cropping on fragile soils without conservation measures in place are also causing land degradation, lower sugar cane crop yields as well as growing food insecurity and rural poverty in the sugar cane belt. In the Ba Valley alone estimated 12,000 hectares of sugar cane farm land is in need of urgent soil conservation work, including 6,500 hectares that should be put to less erosive form of land use. The onsite and offsite effects to sugar cane development such as soil erosion, loss of soil fertility, loss of forest, threats to biodiversity, increase in invasive species, pest and diseases infestation, increase sedimentation of river systems, frequency

of floods, inundation of coastal areas and others, will be exacerbated by the onslaught of extreme climatic conditions such as cyclones, storm surges, drought, high rainfall, floods and sea level rise. Various organizations working with government agencies have assisted in the development of sustainable land management and adaptation responses such as the review and development of legislation and standards, capacity building, and disaster and risk management.

Determinants of Revenue Growth in the Sugar Sector: FAO case study on Ethiopia and Tanzania

By

Food and Agricultural Organization of the United Nations

World sugar has experienced a number of trade and policy changes. Their impact on the sugar sector and small stakeholders in poor countries has yet to be understood. Recent trends include the increasing role of biofuel crops in agricultural and industrial production, rising resource competition between food and industrial crops, increasing demand for commodities including food products, and domestic and trade policy reforms. For developing countries such as Ethiopia and the United Republic of Tanzania, which have the resource potential to expand sugar production and exports, the estimation of the impact of current and prospective trends on the income and wages of small farmers and workers can provide useful insights into the contribution of the sugar sub-sector to development goals. The presentation will analyze the impacts of a set of policy and market scenarios on employment and income of small stakeholders (smallholders, workers) in the sugar sub-sectors of Ethiopia and the United Republic of Tanzania. It will also review the current state of the sugar market, assess the macro and market levels impacts of various market and trade policy scenarios and, identify the linkages between the macro levels and earnings of small stakeholders. Finally, the presentation will draw some policy recommendations (investment, institutions, etc) on how to strengthen these linkages to reduce poverty.

The Causes and Effects of the Low Adoption Rate of Technology in Sugar Cane Production

By

Alcides Leao

(Professor, UNESP – São Paulo State University, Brazil)

Brazil has the most complete and efficient ethanol program in the world, with a nationwide distribution at any gas station. Flex cars are a great success, with more than half of all cars on the road in Brazil are flex, as well as 90% of all new cars sold. In spite of such success, the biggest challenge for the Brazilian industry is that 90% of ethanol production is for internal consumption because many countries impose very high tariffs on imported ethanol. Locally the problems are that the industry is fragmented; the government controls the fuel price through Petrobras, reducing the profit; and the country is facing some climate problems that are reducing the sugar cane yield resulting in many mills facing solvency problems. There are significant variations in terms of agricultural yield in Brazil. The maximum potential yield in theory is 381 ton/ha; the maximum experimental is 212 ton/ha; the maximum commercial is 212 ton/ha; and the commercial average is 84 ton/ha. On the one hand, there are companies operating at high technological level companies and some just breaking even with very low technological level. Nevertheless, electricity companies interested in bio-electricity, and even traditional food companies are entering

the industry, moving from sugar and into electricity, bioplastics, chemicals (biorefinery) and a variety of different product from low carbon products, increasing the demand for more sugar cane production. The directive to ban field burning is shifting the breeding priorities, mechanization and logistics in the field. On the other hand, new processes and products as second generation ethanol, pyrolysis, biomethanol, and fine chemicals are the opportunities for those mills that pursue long term sustainability and independence from government policies. Examples such as the use of Renewable Aviation Kerosene - Jet A/A-1 (with a debut at Rio+20, in Brazil), harvesting mechanization, wastes utilization (sugar cane leaves and bagasse), transportation, government policy and final products will be discussed in this presentation.

World sugar prices and biofuel production in Brazil:

By

Alexandre Rands Barros

(Professor, Federal University of Pernambuco, Recife-PE, Brazil)

and

Carlos Magno Lopes

(Professor, Federal University of Pernambuco, Recife-PE, Brazil)

Brazil has built a technology that allows almost costless movements of sugarcane between sugar and alcohol production. Technological developments also ensured substitution between alcohol and gasoline as car fuels. Therefore, biofuel prices tend to converge to a fixed proportion of gasoline prices in Brazil, with potentially high fluctuations in its supply. Such basic relationships can generate both instability or stability for world sugar prices, depending on price elasticities of demand and supply. The range for such elasticities and the size of Brazilian sugarcane production with respect to the world market means that price stability tend to increase in the near future, unless oil price instability becomes much higher than the one of sugar price.

GENERAL INFORMATION

Venue

The conference will be held from 21 – 23 August, 2012 at the Westin Resort & Spa, Denarau, Fiji. Tel: (679) 6750777 Fax: (679) 6750389 Webside <http://www.fijifvb.gov.fj> provides useful information about the country, including that of the resort.

Entry Formalities

A passport valid for at least six months beyond the intended stay in Fiji is required. Countries under visa exemption order are: Antigua and Barbuda, Argentina, Australia, Austria, Bahamas, Bangladesh, Barbados, Belgium, Brazil, Canada, Chile, Colombia, Denmark, Dominica, The federal Republic of Germany, Finland, France, Guyana, Indonesia, Israel, Italy, Jamaica, Luxembourg, Malaysia, Mauritius, The Netherlands, New Zealand, Norway, Pakistan, Paraguay, Peru, The Philippines, Republic of Ireland, Sierra Leone, Singapore, South Korea, Spain, Swaziland, Sweden, Switzerland, Taiwan, Trinidad and Tobago, United States of America, Uruguay, United Kingdom of Great Britain and Northern Ireland, Venezuela, Zimbabwe, Thailand, Mexico.

Provisions will be made for the visa to be issued on arrival on delegates from countries whose nationals would normally require visas to enter Fiji but are unable to obtain them prior to arrival in Fiji. In such cases, it is important that advance notice is given in the registration form to the Conference Secretariat as early as possible.

Registration

An early bird registration of US\$750 will be accepted until 15 July. A registration fee of US\$800 applies there – after.

Hotel Accommodation

Delegates should make their hotel reservation through

Banking Facilities

The hotel, commercial banks or through authorized foreign exchange dealers. The national currency is the Fijian Dollar. The exchange rate is approximately \$F1.40 to one US dollar and \$F2.33 to one sterling 1.00. Money or travelers cheques can be exchanged at the following:

Airport Banking	:	24 hours
Hotel Reception	:	24 hours
Banking Hours	:	0930 – 1500 hours

Major credits cards are widely accepted, as are travelers cheques.

Health Requirements

There is no malaria or yellow fever in Fiji, and the nation is free of major tropical disease. However, yellow fever and cholera vaccinations are required only for those arriving from infected areas.

What to wear

Light cotton clothing is recommended, with a light jacket or sweater for cool evening breeze.

Quarantine

Fiji has strict quarantine regulations. The best way to meet these regulations is to avoid bringing in any seeds, raw plants or animal matter.

Climate

Fiji enjoys a tropical maritime climate without great extremes of heat or cold. Temperatures average 22 degrees Celcius (72 degrees Farenheight) during the cooler months.

Electricity

The standard electrical current is 240 volts, 60 cycles a.c

Time

Fiji is 12 hours ahead of Greenwich mean time (GMT)

Enquiries

All enquiries concerning the conference may be addressed to:

Mr. Timothy Brown
Secretary, Organizing Committee
P O Box 5123 Lautoka, Fiji Tel: (679) 6666900
Fax: (679) 6663520
E-mail: timb@fsc.com.fj

Mr. Kaison Chang
Senior Economist and Team Leader
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E-mail: Kaison.Chang@FAO.org

REGISTRATION FORM

Please complete all relevant information using black printing.
Full payment must accompany this registration form.

Personal Details Title _____ Surname _____ Given Name _____
 Organization _____ Position _____
 Address _____ Suburb _____
 State _____ Country _____ Postcode _____
 Business Telephone _____ Business Facsimile _____ Home Telephone _____
 Name(s) of accompanying family members _____

Visa Requirements If you require a visa on arrival please enclose 3 passport photographs and fill in the following details from your passport

Full Name _____ Nationality _____
 Passport No _____ Date of Issue _____
 Place of Issue _____ Expiry Date _____
 Date of Birth _____ Place of Birth _____ Marital Status _____

Registration Fees **Earlybird Registration (By 15/07/12)** **Full Delegate Registration**
 USD750 USD800

Please indicate your preference for accommodation.

Westin Resort & Spa – Conference Venue

Room Type:- Single (\$F270 + 20% VAT inclusive of breakfast)
 Double/Twin (\$F270 + 20% VAT inclusive of breakfast)

The Sofitel Resort

Room Type:- Single (\$285 inclusive of tax & Breakfast)
 Twin/Double (\$305 inclusive of tax & breakfast)

5 minutes walk from conference venue.

Only limited number of rooms available

IMPORTANT!! Please Complete

Arrival Details:- Nadi International Airport

Date:- _____ Time:- _____ Airline:- _____

Social Functions The following social functions are included in earlybird and full delegate registration fees.

Please indicate if you wish to purchase additional function tickets

Conference Reception	21/08/12	US\$85
Conference Dinner	23/08/12	US\$85
Field, Visit	23/08/12	US\$50

Including farewell drinks & entertainment on Thursday evening.

Dress Code:"Bula" or light informal wear. For those wishing to purchase "Bula" outfits these are available at the hotel boutiques.

Special Requirements Please list any special requirements you may have for the Conference, ie Dietary requirements

Wheelchair Access etc.

Spouse Programme A variety of activities will be available each day. On arrival please contact the conference secretariat for details and bookings

Cancellations And Refunds Any cancellations must be made in writing to the conference secretariat. Full refund, less an administration fee of US\$50 will be paid on all cancellations before 01/08/12, 50% refund will be paid on cancellations notified after 01/08/12. Substituting delegates, however, will be accepted at no additional charge.

Registration Payments Return this form with your full payment of

Registration Fees \$ _____

Additional Social Functions \$ _____

Total Enclosed \$ _____

Bank Draft Money Order Telegraphic Transfer
Please make payable to:

Name: SUGAR INDUSTRY FAO CONFERENCE
Acc. No.: 9803572743
Sfft: WPAC FJI FX
BSB: 039003
Bank: Westpac
Branch: Lautoka, Fiji.

I have read and understood all the information included on this registration form

Signed _____ Date _____

Registration forms should be completed and returned to:

Fiji/FAO Conference Secretariat
P.O. Box 5123
Lautoka
Phone (679) 6666900
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WESTIN RESORT & SPA

Discover a place where you can be at your best. Upon entering a Westin® hotel, we welcome you with sights, sounds and scents to stir your soul and replenish your spirit. Leave the outside world behind and allow your senses to be elevated. You have found your place to relax, revive and experience renewal.

Welcome to the world of Westin luxury in the South Pacific. A place where five star comfort harmonizes with tropical surroundings and international style fuses with Fijian island warmth.

Stunningly situated on picturesque Denarau Island, The Westin Denarau Island Resort & Spa is an ideal choice for your next vacation or event. Conveniently located 20 minutes drive from Nadi International Airport, while Port Denarau, the gateway to the famous Mamanucas and Yasawa Islands, is just five minutes away and accessible by complimentary shuttle.

Guest accommodation

The resort's 271 guest rooms are superbly infused with South Pacific style. Each room features our signature ten-layer Westin Heavenly Bed, 32" LCD TV, refreshment centre, high-speed internet and Heavenly Shower. All rooms have a private balcony or patio overlooking the landscaped gardens or ocean front.

Fine Dining

The Westin Denarau Island Resort & Spa is home twosome of Fiji's most acclaimed restaurants. With a variety of dining experiences offering the finest international dishes, freshest produce and the highest quality food preparation standards, there is something for everyone.

Facilities & services

As the only five star integrated resort complex in Fiji, Westin guests are further pampered by the combined facilities across the resort and the nearby Sheraton Denarau Villas and Sheraton Fiji Resort.

Relax and soak up the sun by any of our five swimming pools, rejuvenate at the Heavenly Spa by Westin, or energize yourself with game of golf or tennis. For something unique, experience the resort's Fijian cultural activities such as firewalling, traditional dancing and Kava ceremony, or explore some of the outer islands on a day cruise from Denarau Marina.

Heavenly spa by westin

The Heavenly Spa by Westin is beautifully designed to blend with nature. Peacefully nestled amidst 1350m² of lush vegetation, the spa's tranquil surroundings set the scene for spiritual healing and sensory pleasure.

The spa's ten beautifully appointed open-air therapy rooms and two suites are designed to reflect a traditional Fijian bure and feature a private treatment room with treatment bed, open-air shower and beautifully landscaped gardens.

Westin WORKOUT® powered by Reebok

Located adjacent to the Heavenly Spa by Westin is the Westin WORKOUT® powered by Reebok, a state of the art fitness centre offering cardiovascular and weight training equipment and a 3 lane, 25 meter, infinity edge lap pool to ensure Westin guests can stay energized while away from home.
