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COMMITTEE ON COMMODITY PROBLEMS

JOINT MEETING OF THE THIRTY-SECOND SESSION OF THE INTERGOVERNMENTAL GROUP ON HARD FIBRES AND THE THIRTY-FOURTH SESSION OF THE INTERGOVERNMENTAL GROUP ON JUTE, KENAF AND ALLIED FIBRES

Salvador, Brazil, 9-11 July 2003

REPORT OF THE THIRTEENTH SESSION OF THE SUB-GROUP OF SISAL AND HENEQUEN PRODUCING COUNTRIES

I. INTRODUCTION

1. The Sub-Group of Sisal and Henequen Producing Countries held its Thirteenth Session at Salvador, Brazil from 9 to 11 July 2003. It was attended by delegates and observers from the following producing countries: Brazil, Ecuador, Kenya, and Tanzania. Observers from the United Nations Industrial Development Organization (UNIDO) and the London Sisal Association also attended.
2. The Sub-Group adopted the agenda as presented in document CCP: HF/SP 03/1.
3. Mr Odhiambo Wilson (Tanzania) was elected as Chairperson and Mr Wilson Andrade (Brazil) as Vice-Chairperson.

II. MATTERS FOR SUBMISSION TO THE GROUP

A. RECOMMENDATIONS REGARDING PRICES OF SISAL FIBRE AND HARVEST TWINE

4. The Sub-Group decided to continue the practice initiated at its Twelfth Session of recommending ranges within which prices might move, rather than single values.

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Consequently, it made the following recommendations:

- a) The indicative price for Brazilian No. 3 fibre should be increased from the range US\$550-600 to the range US\$605-660 per tonne c.i.f. European ports;
- b) The indicative price for East African UG fibre should be increased from the range US\$700-750 to the range US\$840-900 per tonne, c.i.f. European ports;
- c) The indicative price for sisal and henequen baler twine should remain unchanged at US\$19 per 18 kg bale of regular runnage c.i.f. United States and western Europe duty paid, where applicable, if terms were cash against documents.

B. SISAL AND HENEQUEN PROJECTS SUPPORTED BY THE COMMON FUND FOR COMMODITIES (CFC)

5. In order to support the IGG on Hard Fibres in its role as Supervisory Body of projects funded by the Common Fund for Commodities (CFC), the Sub-Group reviewed developments relating to ongoing and proposed projects on the basis of document CCP: HF 03/2 – JU 03/2. It welcomed the additional information on these projects provided by delegates of the relevant countries.

6. The Sub-Group noted that significant progress had been made on the project “*Product and market development of sisal and henequen products*” since the background document was prepared. A workshop had been held in Tanzania in February 2003 to disseminate results to stakeholders, a hammermill had recently been installed after a considerable delay waiting for parts, and the flume tow machine was being tested. The Meristematic Tissue Culture (MTC) laboratories in Tanzania and Kenya were operational. Some 2000 families are now involved in sisal production under the smallholder scheme. The Sub-Group noted however that the project was due to be completed at the end of 2003, but that because of unavoidable delays which had occurred, critical activities could not be completed in time. In particular, the proposed market survey for pulp could not be undertaken until results from the variety trials and the hammermill became available. Much of the potential benefit could be lost if activities were to be terminated prematurely, and thus the Sub-Group urged the IGG to recommend to the CFC that the project be extended for a year, within the existing budget, in order to allow all activities to be completed and the full benefits of the project to be realized.

7. The Sub-Group noted that construction of a pilot plant under the project “*Cleaner integral utilization of sisal waste for biogas*” was expected to commence soon.

8. The Sub-Group was disappointed by the conclusions of the CFC regarding the three components of the proposal on Sisal Agriculture Business Project in North Eastern Brazil. The component on the development of new outlets for sisal fiber in geo-textiles applications had not been approved as such, although the Consultative Committee of the CFC had agreed to fund a fast track study on “*The comparative advantages of sisal, coir and jute in geotextiles*”. The Sub-Group noted that the Fund was in the process of identifying institutes or companies which could undertake this study.

9. The CFC had not supported the component on the utilization of sisal for reinforcement of thermoplastic composites. The Sub-Group noted that presentations given in the Informal Consultation held on 8 and 9 July had clearly pointed to both the great potential for the use of natural fibres in composites and the need for further research to overcome specific problems and to prove viability in the market in order for this potential to be realised. The Sub-Group recommended that the FAO Secretariat and the IGG Chairperson review the project proposal and re-present it to the CFC for consideration at the earliest possible opportunity.

10. The Sub-Group noted that while the component on the use of sisal composites for the building materials industry alone had been recommended by the Fund’s Consultative Committee

(as a project now titled *Research and development for the use of sisal fibres in construction materials*) and that it had subsequently received "technical approval" from the Executive Board, it has been held for reprioritisation by the Board at a later meeting. The Sub-Group requested that the IGG urge the CFC to approve this project for implementation as soon as possible, noting that the expected benefits of the project would be valuable to all sisal and henequen producing and consuming countries.

III. DATE AND PLACE OF THE NEXT SESSION

11. The Sub-Group recommended that its Fourteenth Session be convened at the site of and immediately prior to the Thirty-third Session of the Intergovernmental Group on Hard Fibres.