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des  
Nations  
Unies  
pour  
l'alimentation  
et  
l'agriculture

Organización  
de las  
Naciones  
Unidas  
para la  
Agricultura  
y la  
Alimentación

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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, 8-11 July 2003

### REPORT OF THE FOURTH INTERSESSIONAL CONSULTATION ON FIBRES LONDON, UNITED KINGDOM, 26 NOVEMBER 2001

## I. BACKGROUND

1. Following the recommendation of the Joint Meeting of the Thirty-first Session of the Intergovernmental Group on Hard Fibres and the Thirty-third Session of the Intergovernmental Group on Jute, Kenaf and Allied Fibres in December 2000, the fourth Intersessional Consultation on Natural Fibres was held in London on 26 November 2001.

2. The Consultation was arranged in co-operation with the London Sisal Association and was chaired by Mr Peter Clasen from Germany. It was attended by 30 participants from Brazil, India, South Africa, Tanzania, Germany, Italy, the Netherlands, Poland and the United Kingdom (See List of Participants in Annex 1). Discussions at the Consultation were interesting, well informed and business-like. A number of participants expressed their appreciation of this kind of meeting.

3. The agenda (Annex 2) included market development and short-term outlook for fibres, and the jute and polypropylene sacks market in western Europe. It also included a review of the progress of projects financed by the Common Fund for Commodities (CFC) and considered new proposals and a review of research directions and new uses for natural fibres. The Consultation thus provided an opportunity for exchanging market intelligence between producers and

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consumers of natural fibres and for reviewing ongoing commodity development activities and for recommendation of future direction for these activities.

## II. CURRENT SITUATION AND SHORT TERM OUTLOOK FOR NATURAL FIBRES

4. The Consultation reviewed current market trends and the short-term outlook for jute, kenaf, sisal abaca and coir and allied fibres and a useful exchange of views took place. World export prices of jute fell in the early months of the 2001/02 season following a recovery in the latter part of the previous season and at their current level they remained well below the US\$420 floor of the indicative price range agreed at the last session of the IGG in December 2000. Prices of sisal have also declined over a number of years, and consumption of baler twine had dropped markedly in the current season. While participants saw some promising prospects for natural fibres in composite materials in the automotive industry, they may not be price-competitive. Natural fibres may also find application in composites for water tanks and roofing. The use of coir in geotextiles, and trade in coir pith show promise, but the potential for increased trade is hampered by a lack of internationally-accepted standards. Some participants expressed concern at the impact of tariffs and other barriers to trade, particularly in the coir sector, and requested that a study of these barriers be undertaken. The Consultation hoped that such a study might help in seeking the achievement of freer trade for natural fibres in the course of the forthcoming round of trade negotiations.

## III. TRENDS IN MARKET FOR JUTE AND SYNTHETIC SACKS IN WESTERN EUROPE

5. The Consultation reviewed the trends in import market for jute and synthetic sacks in western Europe over the period 1987 to 2000 on the basis of a document prepared by the Secretariat. It noted that jute's share in the sacks imported to western Europe declined to only 15 percent in 2000 against 40 percent in 1980. The total market for jute sacks in Europe fell to about 80 million from 250 million in 2000, while sales of polypropylene sacks rose from 390 million to 445 million over the same period.

## IV. REVIEW OF PROGRESS OF COMMON FUND PROJECTS

6. The Consultation reviewed progress on three projects, one on sisal which commenced in 1998, **Product and Market Development of Sisal and Henequen Products**; one on abaca which commenced also in 1998 **Abaca: Improvement of Fibre Extraction and Identification of Higher Yielding Varieties**; and one on coir which commenced in 1999 **Coir-based Building and Packaging Material**. The Consultation had only limited up-to-date information available to it on the projects on sisal and abaca. Regarding the project on sisal in particular, it expressed concern that progress continued to be made very slowly, and requested the Secretariat to take whatever steps it can to ensure that in future the project proceeds according to schedule. The Consultation noted that a mid-term Review for the project **Coir-based Building and Packaging Material** was expected to be held at the end of February 2002. This would probably be a two-day event, one day to be a workshop and one day a review meeting.

7. The Consultation noted that a seminar on Alternative Applications for Sisal and Henequen had been held in Rome on 13 December 2000 as part of the Joint Meeting of the IGG on Hard Fibres and the IGG on Jute, Kenaf and Allied Fibres. Under this "Fast Track" project, the Fund provided finance to allow various experts to present papers to this seminar. The Proceedings of the Seminar had been printed and were made available to participants at the Consultation.

8. The Consultation also noted that a proposal to hold a seminar or convention on coir had been approved by the CFC, and that the Convention was expected to be held in Colombo, Sri Lanka 29 and 30 April 2002. It will address constraints to the export of coir from the coir

producing countries, and is expected to formulate a proposal for action which will possibly include a request for further CFC assistance. The lack of a uniform set of standards was referred to as a hindrance to trade, particularly with respect to coir and coir products, and this is expected to be further discussed at the CFC-financed Coir Convention in Sri Lanka in 2002.

9. The Consultation considered new project proposals, and it recommended that three be submitted to the CFC in support of funding:

1. Agriculture Business in Northeastern Brazil. This project has three major objectives: to develop composites to automotive industry; to develop sisal composites to be used by civil building and to develop sisal fibre geo-textiles;
2. Composite Applications using Coir Fibres in Sri Lanka (fast track proposal), formulated by Delft University, to investigate the technological and economical potential of coir based composites
3. Biotechnological Upgradation and Development of Machinery for Spinning of Coir Yarn and Development of Machinery for Automatic and Semi-Automatic Spinning of Coir (India and Sri Lanka)

## **V. ANY OTHER MATTER**

10. The consultation devoted some attention to the functioning of the IGGs. It felt that they might more actively promote a market for natural fibres, and it recommended that the private sector be more involved in IGG activities.

11. The Consultation welcomed the invitation from the participant from Brazil to hold the next Joint Meeting of the FAO Intergovernmental Groups on Hard Fibres and on Jute, Kenaf and Allied Fibres in Brazil.

**ANNEX I**  
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## **ANNEX II**

### **AGENDA**

9.30 am: Opening of the Consultation

- Presentation by FAO Secretariat on market developments and short term prospects for Jute and kenaf; Sisal; Abaca; and Coir.
- Statements by participants, discussion, on market situation and prospects for natural fibres
- Presentation of a short paper on market trends for jute bags vs synthetic bags in Western Europe

12.30: Lunch

- Review of progress of Common Fund projects on: Product and Market Development of Sisal and Henequen Products Abaca: Improvement of Fibre Extraction and Identification of Higher Yielding Varieties Coir-based Building and Packaging Material and progress of new proposals:
- Future research directions for natural fibres. New project proposals
- Any other matters.