

Agribusiness Leaders Seminar

Proceedings

Objective: The Agribusiness Leaders Seminar was organized to enable U. S. corporate leadership to discuss with senior A.I.D. management their interests and proposals for business/A.I.D. partnership.

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The Discussion Participants:

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 Executives of agribusiness firms and industry organizations
 Hill staff
 Representatives from multilateral and NGO development agencies

Venue: Ralston Purina - Washington Office
Conference Center
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The AID Environment for Assistance to the Agribusiness Sector

The Food Systems Strategy is directed to farm production and operations which support production plus the commercial activities in marketing, processing and distribution of agricultural products. This strategy is expected to improve the quality and quantity of the food available to consumers, improve the stability in the market outlets for farmers and increase national employment and incomes by enabling the growth and expansion of the agriculture sector. There is recognition that factors such as effective consumer demand, regulatory environment, investment and trade facilities are important externalities in the implementation of the Food System Strategy.

Development assistance has focused heavily on agricultural production technology in the initial stages of economic development (1950 through 1990) and during this period only tentatively included value-added processing and diversified economic growth. For those countries which are still in the Low-Income Agricultural Stage of economic development, the agribusiness sector is dominated by such enterprises as farm input supply, local flour milling, and roadside marketing of seasonal harvests. Agribusiness activity at this stage is small, rural, part-time work which is often referred to as the informal sector and is largely undocumented. Employment in agribusinesses is about one tenth of employment in the agriculture production sector and value-added by agribusinesses is proportionately small.

Economic development introduces urban industrial enterprises and creates a transitional economic structure. In the Transitional Stage, the agribusiness sector expands to include bulk importing and local packaging of production inputs, some simple farm product processing and convenience packaging for the urban consumer market, and a few installations for export production and branded product processing for the world market. With continued industrial development there is an acceleration of agribusiness sector growth and progressively increased complexity in the enterprises and services provided by the sector. As the stage of development evolves to a condition that can be classified as a Middle-Income Industrializing Economy, the agribusiness sector has grown to a size equal to or larger than the agricultural production sector in terms of contribution to Gross Domestic Product and in terms of employment. In subsequent stages of development the agribusiness sector continues to outpace the production sector and becomes a key sector for the national economy.

In the course of agribusiness sector development, the enterprises become more responsive to demand-driving factors. At the Low-Income Agricultural Stage the agriculture or farming enterprises are predominantly structured for the production of cereals or starches and consumers may spend up to 60% of their

disposable income for purchase of unprocessed foods, often in small quantities. As purchasing power increases there is a only modest, if any, increase in per capita cereals and starch consumption, but there is significant growth in demand for processed items such as flour and bakery goods. The increased purchasing power in the Transitional Economy also supports a demand for fruits, vegetables and livestock products to improve the quality of the diet. The Middle-Income Industrializing Economy will have about 50% of the population in urban areas expecting regular delivery of a wide range of fresh and processed food items, and with the purchasing power to realize an increasing portion of these expectations. The following table illustrates the transformation that occurs in retail expenditures for food.

Figure 1 -- Development Status and Per Capita Food Expenditure

Development Status	Per Capita Income(1)	Food Expenditure (%)	Food Expenditure (\$)
Agricultural	161	60	97
Transitional	321	50	160
Industrial	971	40	389

(1) Data from the Food Systems Strategy for Growth in the 1990s, ENE Strategic Planning Series I, ENE/TR/ARD, March 1990

The Partnership for Business and Development, published in December 1990, provides guidance for involvement of the private sector in agribusiness development assistance. The Initiative states that, "The strengthening of the ties to the private sector is one of several supporting strategies and mechanisms to maximize the delivery of American ideas, technology, funds and know-how in the 1990s." "Partnership is a meaningful term. It connotes alliances... cooperation ... mutual interests. It is an appropriate term for almost every endeavor AID undertakes." "By proposing a partnership with the private sector, AID is primarily recognizing the important role this sector can and should play." "...as an economic agency of the U.S. government we have a fundamental interest in building the import capacity of these countries and in ensuring that qualified and efficient American firms successfully compete for the supply of goods and services that complement and support sustainable growth in these economies." "AID proposes to overcome investment constraints by creating a high-quality, one-stop business service to match U.S. and developing country entrepreneurs in ventures that are profitable to both, as well as to the consuming public."

The Strategic Objectives of U.S. Agribusiness

The Mission Statement of U.S. agribusiness may be paraphrased as; a customer-driven enterprise committed to providing optimum value in high quality products and services, thereby enhancing the wealth of the employees, the shareholders and the communities served by the company. In fulfilling this mission, companies try to produce the best products on the market; deal honestly and fairly with their employees, sales representatives, business associates customers and stockholders; advertise and sell their products vigorously, but without misrepresentation; and give helpful management suggestions to their customers to assist them in making the greatest profit from their products.

U. S. agribusiness is dynamic and rapidly changes with new technology, but at the same time has successfully adapted that technology to a broad range of conditions in a world-wide marketplace. Corporate technology combines theoretical, experimental, farm field or feedlot trials, and feedback from farm operations around the world. Research is the key to success, and intellectual property rights is a vital aspect in corporate life. However, the company only realizes a return if it can enable the farmer to benefit from the power of the improved technology.

Many U.S.-based agribusinesses have impressive investments in countries of interest to AID and their track record demonstrates a mutuality of interest in economic development. Examples cited from the Ralston Purina dealership network in Peru and Portugal, the American Breeders Services herd improvement programs in Hungary and Zimbabwe, and the Pioneer seed operations in Hungary and Africa build a strong case for a closer working relationship between such progressive companies and U.S.A.I.D.

Agribusiness executives recognize both problems and potential benefits in a partnership with AID. The generous participation by the three companies invited to make presentations in the seminar speaks eloquently to their interest in the partnership. (Each company represented by 3-5 person teams headed by a president or vice president for their international operations) Their thoughtful recommendations are further demonstration that a productive working relationship is possible. A factor of additional significance is that the response rate for invitees was nearly 50%, in spite of the two week notice. The positive tone in the question and discussion sessions suggests that the concept of business and development partnership in the agribusiness sector enjoys a broad base of support.

The Partnership Issues

1. Financing and Financial Institutions

While not recommending direct financial aid to new ventures, the companies have put forward a number of recommendations about financing and financial institutions that serve the agribusiness sector. Farmers, feed and seed distributors, livestock breeders, meat and vegetable processing facilities, food distribution businesses, and many more types of enterprises depend upon credit facilities to expand and to conduct their regular business. Banks in developing countries usually do not want to lend money to agriculture or agribusiness. Often they don't know how to assist agricultural producers. Often the rural bankers want the agribusiness companies to provide the collateral for the dealerships and/or customers, but the companies are not banking organizations and prefer not to get into that business. The financial resources and the institutional capabilities are seen as critical constraints by the companies participating in the seminar.

The recommendations presented by the companies included the augmentation of the funds for agribusiness lending, the training of account managers and loan officers for agribusiness departments of banks, the expansion of commodity import programs as an indirect means of funds expansion, collaboration with the rural lending departments in establishing loan programs and management practices for rural accounts, and special programs for the recurrent needs of hard currency for maintenance parts and inputs. The discussion of the various approaches recognized the overlap with programs such as ExIm and OPIC and suggested that clarification or coordination may offer some of the desired improvements.

The discussion of the problems in the area of financing and credit acknowledged that the commodity import programs are limited. A.I.D. might play a larger role in the policy area in respect to rural banking and in training of staff for rural banking departments. Throughout the discussion there was a theme advocating improved information exchange between the agribusinesses and the development agencies; i.e., early warning of non-viable enterprises and attention to rural banking problems as a component of the agribusiness strategy.

Recommendation:

Provide additional support for aspects of agribusiness financing.

Action:

The Working Group agenda for the Partnership for Business and Development can be expanded to give more attention to programs for agribusiness finance and credit. In addition, the agribusiness strategy and country development strategies can be reviewed, and possibly revised, to increase rural sector financial resources and services in order to improve the performance of the agribusiness sector and impacts on the farmer. In relation to these policy and program changes, it would be appropriate for AID to support some descriptive and analytical studies of the financing requirements of agribusiness development.

2. Partnership Activities

Recommendations in several forms proposed direct input of U.S. agribusiness executives in planning and implementation of development assistance. One advocate suggested that agribusiness firms, with the experience of their direct farmer delivery systems, could evaluate the extent that programs were reaching the beneficiaries, and corporate experience would be beneficial in estimating the potential impacts on local economic growth. Along these lines it was suggested that companies could arrange appraisals of new agribusiness technology by study of their existing operations in similar environments as a component of policy and strategy planning. Company resources can also contribute to training, research and extension and there are multiplier and/or leverage benefits from partnership in these areas.

The partnership recommendations were stated in various forms such as a joint Task Force, an advisory committee, a consultative group or more frequent staff interaction. The brief discussion did not fully explore any of these options and develop a consensus on the modalities of the partnership. The Working Group for the Partnership for Business and Development was frequently suggested as an important point of action regarding this group of recommendations.

The establishment of a "One-Stop Service Facility" for U.S. companies was a frequently recurring theme in the company recommendations and the seminar discussions. The suggested services to be provided by such a facility included information on local entrepreneurs with interests that might be developed into joint venture partners, listings of potential agents or members of a business alliance; information on financing from U.S. government and other sources; information on currency regulations; information describing legal considerations and sources of legal services that understand the needs and interests of U.S. companies; etc. The proposed AID Center for Trade and Investment Services was endorsed in principle, but with reserves until more is known about its capability in the agribusiness sector.

Recommendation:

Means should be established for active participation of executives from U.S. agribusiness in the policy formulation, strategic planning and program implementation for development assistance in the agribusiness sector.

Action:

The Business Advisory Council feature of the Administrator's Initiative for the Business and Development Partnership was endorsed with the proviso that agribusiness should be represented in the make-up of the Council. Similarly, the Center for Trade and Investment Services was endorsed. The fact that private sector executives are interested in more direct involvement in development will be disseminated through the distribution of the seminar proceedings and other means to develop informal interaction concurrently with the development of the formal linkages. Agency policy in program planning and implementation will be reviewed, and amended as appropriate, to increase the partnership of the private sector.

3. Training

The company executives made strong recommendations for joint action in training of technical managers, marketing staff and accountants. One executive developed this line of recommendation into the advocacy of a School for Entrepreneurs which might attract business support, including part-time faculty. Certain categories of well-trained professionals are reasonably well supplied in developing economies, but the critical deficiencies in marketing, management and accounting skills are limiting new ventures and expansion of existing enterprise.

The case for the agribusiness marketing staff as an effective farmer extension service was made in all presentations. Unfortunately, technology transfer and adaptation services are costly services, particularly in the early stages of establishing a new venture and business would welcome some assistance in support of such services. A related recommendation suggested that academic training in the U.S. include sessions on farms and with agribusiness to enable the returned participant to have a more complete picture of the workings of the agriculture sector, including agribusiness.

The discussion also included personnel exchanges between A.I.D. and business as a means of improving the effectiveness of the partnership. Several company executives expressed interest in exploring this type of program at an early date.

Recommendations:

Improvements in three types of training were recommended; farmer extension services within commercial marketing programs, schools for entrepreneurs and exchanges between A.I.D. and business.

Action:

In principle, all three recommendations are endorsed for appropriate action. The first two recommendations will be forwarded to the Human Resources Development staff for incorporation in new education and training projects. The third recommendations will be forwarded to the A.I.D. Personnel Training Staff along with the suggestion to involve the company representatives in the planning process for the new agribusiness training program for agency staff.

4. Priority for Animal Agriculture

Ralston Purina and American Breeders Service offer impressive evidence that improvement of animal agriculture can provide significant rural and consumer benefits. With this information they make a strong case for A.I.D. reconsideration of the priority assigned to animal agriculture. The seminar discussion did not attempt to explore this matter.

5. Intellectual Property Rights

U.S. agribusiness places a high value on their intellectual property rights because the returns from intellectual property are required to cover their research and technology adaptation expenses. The U.S. government, including A.I.D., recognizes such rights and is giving a great deal of attention to this subject in the context of GATT and other negotiations. In defining the working relationships of future joint activities, A.I.D. will be committed to protect and/or defend such rights as the case may require.

Recommendation:

Agribusiness requires a clear statement of support for intellectual property rights by AID in defining the terms of the business and development partnership.

Action:

An appropriate statement can be made by the Administrator and elaborated in the Agribusiness Strategy of the regional bureaus.

6. Infrastructure development and a Sustainability Review

At several points the agribusiness executives recommended that AID give more attention to infrastructure development, such as roads and communications services. At the same time, and in a variety of statements, caveats were proposed that would limit infrastructure planning and investment to facilities of utility to expansion and improvement in the rural sector. There was broad support for this conditioned interest in infrastructure, often acknowledged to be in recognition that previous contributions to infrastructure were of limited utility for the rural economy. The discussion did not go much beyond the articulation of these principles.

As a part of the recommendations for development assistance with infrastructure a "sustainability review" was suggested for the planning stage of infrastructure projects. The review would consider the level of technology proposed, the maintenance requirements and fee or tax structures for maintenance. Agribusiness proposes to contribute to this review with their experience during the estimation of the use and return factors for new or expanded infrastructure.

Recommendation:

Rural infrastructure requires increased attention in development strategy, but with improved coordination with the private sector during planning and with provisions for user fees and/or taxes to sustain maintenance of new or up-graded facilities.

Action:

Agribusiness input can be increased in shaping the Agency's contributions to infrastructure development. This input may be developed through the staff offices and/or through consultation with the strategic planners from the private sector.

7. Holistic Strategy

The recommendation that agribusiness development must be formulated within a "holistic strategy" stimulated an interesting body of discussion. Much of this perspective is parallel to the Food Systems Strategy and enjoys broad support. On the negative side are the apprehensions arising from the complexity of planning and management for the holistic concept. The experience with integrated rural development stimulates caution in undertaking an unbounded strategy.

Several features generated substantial support. The recommendation that policy makers should include agribusiness executives was endorsed as an essential foundation for a more holistic strategy. Recommendations regarding multinational research and technology transfer/adaption systems, commercial trade and marketing alliances, public and private sector collaboration and other factors were related to the concept of a holistic strategy and acknowledged as important contributing factors. The interdependency of the dealer organization and the banking services also figured in the discussion. At another level the interdependencies of the three companies; i.e., a seed corn company, a livestock feed company and a livestock management services company, were recognized as benefiting from operating alliances, or another variation on the concept of a holistic strategy.

Recommendation:

Developing countries should form a holistic strategy in seeking nutritional improvement and AID policy should support that concept by provisions of theoretical and commercial inputs to strategic planning for agriculture, including agribusiness.

Action:

The review and revision of the Food Systems and Agribusiness Strategies will be undertaken with the objective of clarification and elaboration of the interdependencies in strategic planning.

Schedule
May 30, 1991

- 7:30 The President's Breakfast with Administrator Roskens
- 8:00 Registration
- 8:30 The Morning Session
 Opening - Robert W. Rickert, Ralston Purina International
 - Carol C. Adelman, Assistant Administrator, ENE
 - Administrator Roskens
 The Business and Development Partnership
 The Food Systems Strategy and Agribusiness
 The Agribusiness Presentations
- 9:15 Dean Mefford, President, Ralston Purina International
- 10:15 Gerald Garbacz, Executive Vice President, W. R. Grace & Co.
- 11:00 Ed Shonsey, Senior Vice President,
 Pioneer Hi-Bred International
 Lynn Engstrand, General Operations Manager, Hungary
 Hari Shukla, Vice President and Regional Operations Director
 (Middle East and Africa)
- 12:00 A Working Luncheon
 Remarks on world agribusiness strategy and planning
 Assistant Administrator Richard Bissell
 Science and Technology Bureau
- 2:00 Introduction of the Afternoon Discussion Sessions
 John Balis, Agribusiness Officer, ENE/TR/AE
 Three concurrent discussion/workshop sessions to consider ways and
 means of putting into action the suggestions of the business leaders.
 Agribusiness Networks
 Technology Transfer: The Power of Advanced Genetics
 Private Sector & Development Agencies: Practical Cooperation
- 4:15 Workshop Synopsis
 John Flynn, Director, ENE/TR

6/11/91

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 Washington DC 20510-1102

The Honorable Robert W. Kasten, Jr. I
 United States Senate
 Washington DC 20510-4902

The Honorable James A McClure I
 Committee on Appropriations
 SH-309 Hart Senate Office Bldg
 Washington DC 20510-1201

The Honorable Charles E. Grassley
 Committee on Appropriations
 SH-135 Hart Senate Office Bldg
 Washington DC 20510-1501

Brent Franzel
 Legislative Director
 Senator Kit Bond

Jo Ellen Urban
 Legislative Assistant
 Office of Congressman Richard Gephardt
 1432 Longworth House Office Bldg
 Washington DC 20515-2503

Sue Suter I
 Office of Congressman Greg Laughlin
 1022 Longworth Office Bldg
 Washington DC 20515

14

Jim Meenan
Office of Senator Max Baucus

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INVT3 6/11/91

Agribusiness Leaders Seminar

A.I.D. Attendance

Senior Staff

Administrator Ronald W. Roskens
 Assistant Administrator Carol C. Adelman
 Bureau for Europe and the Near East
 Assistant Administrator Richard Bissell
 Bureau for Science and Technology
 Assistant Administrator Henrietta Holsman Fore
 Bureau for Asia and Private Enterprise

ENE Staff

ENE/TR John Flynn
 ENE/TR Karl Schwartz
 ENE/TR/AE T. David Johnston
 ENE/TR/AE John Balis
 ENE/TR/AE James Snell
 ENE/PD Lance Marsten
 ENE/TR/PSDS Gary Vaughn
 ENE/TR/PSDS Steve Sposato
 ENE/TR/AE Michael Moran
 ENE/TR/AE Howard Steele

S&T Staff

AA/S&T James O'Connor
 S&T/AG Vince Cusamano
 S&T/AG Dean Alter
 S&T/Ag Tejpal Gil
 S&T/RD Vic Beausoliel
 S&T/N Carolyn Coleman

APRE Staff

APRE/DR/TR Alan Hurdus
 APRE/DR/TR Roger Bloom
 APRE/IBS Melody Bacha

AFR Staff

AFR/TR/ANR/FS Barry Hill
 AFR/TR/ANR/FS Russel Backus

LAC Staff

LAC/DR/RD Tim O'Hare

USAID/Indonesia Robert Navin

Agribusiness Leaders Seminar

ACTIONS LIST

Initial suggestion by Mefford, Ralston Purina during conference with AA Adelman	August 1990
Presentation to ENE/TR Flynn and Balis	October 12, 1990
Letter exchange on format	October 30, 1990 November 15, 1990
St. Louis Planning Meeting at Ralston Purina Offices Chaired by Ralston Purina attended by Pioneer International American Breeders Service ENE/TR/ARD Balis	February 6, 1991
Selection of date (May 30, 1991)	March 28, 1991
Selection of place (Conference Center) (1350 I St N.W.)	March 27, 1991
One Sheet Description	April 8, 1991
Action Memo to Roskens and AAs	May 14, 1991
Invitation List (draft) revised revised	April 8, 1991 April 29, 1991 May 10, 1991
Invitation Letter	May 16, 1991
Mail Invitations	May 17, 1991
Draft Presentations Ralston Purina draft received February 22, 1991 ABS/Grace recieved April 11, 1991 Pioneer draft recieved May 21, 1991	

Speakers and Company Reps

Ralston Purina

Speaker; Dean Mefford, President, Ralston Purina International
 Reps; Bob Rickert, Director, International Financial Services
 Claude Alexander, Director, Government Affairs

W. R. Grace / American Breeders Service

Speaker; Gerald Garbacz, Executive Vice President, W. R. Grace & Co.
 Reps; John K. Walter, Vice-President, American Breeders Service
 James Dawson, Director, International Market Development, ABS
 Priscilla Myerson, Associate Director for Government
 Marketing, Grace

Pioneer Hi-Bred International

Speaker; Ed Shonsey, Senior Vice President,
 Pioneer Hi-Bred International
 Hari Shukla, Vice President and Regional Operations
 Director (Middle East and Africa)
 Lynn Engstrand, General Operations Manager - Hungary
 Reps; Randy Ingram, Manager of Business Development
 Bill Damm, Manager, International Finance

Washington Support Committee

Claude Alexander, RPCo (202-289-2011)
 Priscilla Myerson, Grace, for ABS (202-452-6717)
 John Balis, AID (202-647-7270)

(joint with AID Agribusiness Officers)

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April 23, 1991
 April 30, 1991
 May 14, 1991
 May 28, 1991
 June 4, 1991

Agribusiness Officers Meeting at AID

April 19, 1991
 April 26, 1991
 May 1, 1991
 May 10, 1991
 June 14, 1991

Talking Points for Roskens/Adelman

May 14, 1991

Small Meeting for Presidents with Roskens

Action with the Presidents, per telecon with Dawson 4/10/91
 Invitation letter Mefford to Roskens dated April 15, 1991

Luncheon Arrangements	(Claude Alexander, RPCo) (202-289-2011)	March 28, 1991
Luncheon Speaker and Talking Points		May 28, 1991
Meeting Room Set-Up	(Kathleen McCort) (Conference Center Manager) (202-682-9543)	March 28, 1991
Check AV Equipment Needs	RPCo Fax	April 30, 1991
Hand out materials	RPCo Fax	April 30, 1991
	Check with companies Ralston Purina Pioneer ABS/Grace	
Proceedings and Recommendations Meeting	Grace Office with AID Agribusiness Staff	June 4, 1991
Front Lines Article	draft	June 6, 1991
Bulletin Report for Issue No 3		June 6, 1991
Draft Proceedings to Companies for Review		June 12, 1991
Company Comments Due		July 5, 1991
Proceedings Mailed to Participants		July 26, 1991
Recommendations incorporated in revision of the Agribusiness Strategy		August 15, 1991
Agribusiness Strategy Working Group Meeting 15, 1991		September
SMNR2	6/11/91	