



Abt Associates Inc.

**Model Arrangements
for SPS Stakeholder
Involvement at the
National Level
STDF 19**

Phase II Report

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Model Arrangements for Stakeholder Involvement at the National Level

Phase Two Report

I. Introduction

In response to requests received from various member governments for technical assistance in the area of sanitary and phytosanitary (SPS) standards, and cognizant of the need to fortify trade capacity in the SPS area, in 2004 the World Trade Organization formulated a pilot project for Sri Lanka and Paraguay entitled “Model Arrangements for Stakeholder Involvement at the National Level (STDF 19).” In early 2005 WTO signed a contract with Abt Associates Incorporated (Abt) to carry out STDF 19.

WTO has defined the ultimate objective of this activity as “improvement in the institutional capacity of the member country to work in an international trading system that applies demanding standards in food safety as well as animal and plant health”. The intended beneficiaries are both public and private sector stakeholders. Collectively, their improved capacity is expected to translate into improved export performance.

The overall goal of STDF 19 is to improve SPS-related information flow as well as information sharing between the public and private sector with positive spin-offs for market access. In a later communication, the SPS Secretariat elaborated as follows:

“In essence, the SPS Agreement tells a country it has to provide information, it does not set out clearly the mechanism by which countries should handle the information which is generated by other Members meeting those obligations. WTO document G/SPS/7/rev.2 talks about recommended procedures for notification. The agreement is silent on the national procedures that need to be in place to request information from other countries or to make comments on notifications. There is no guidance on how to comment or handle this information. One of the major aims of this project is thus to give some guidance as to what might constitute model arrangements to handle this information at national level, not just for the information generated by the WTO, but more generally in relation to that generated by OIE, Codex and IPPC. [In other words,] SPS writ-large.”

Ideally, the NNA in each country will be supported by a mechanism through which stakeholders can be informed of the newly notified SPS measures of other countries so as to be able to comment on them before entry into force. Aside from a vehicle to request the full legal text of a notified measure, which is not provided in the WTO notification, or to ask for details on implementation or on the scientific basis underpinning the new or amended measure, the notification procedure can act as way to request special and differential treatment e.g. a longer time frame for compliance or for technical assistance to be able to comply.

According to the STDF 19 terms of reference, the specific purposes of the project are:

- (1) To identify parameters for best practice in order to improve the co-ordination of SPS activities in government departments and in the private sector at a national level;

- (2) To improve the technical capacity of government bodies to assimilate and respond to flows of SPS related information;
- (3) To improve the technical capacity of government bodies to assess the implications for national exports of new SPS measures or international standards developed by Codex, IPPC, and OIE; and
- (4) To establish consultative mechanisms between government and the non-governmental actors, particularly in the private sector.

Results expected at the end of the project include:

- ◆ A marked improvement in the co-ordination of SPS activities in the two selected developing countries (Sri Lanka and Paraguay) as demonstrated by the establishment of a national SPS coordinating body (including public and private sector stakeholders)
- ◆ Better communication between stakeholders, including: National Notification Authority; National Enquiry Points; the OIE, IPPC and Codex national contact points; government departments; the private sector and consumer groups), as demonstrated by the submission of comments on notifications of particular interest to the private sector and increased participation in the development of international standards of interest.
- ◆ Making National Enquiry Points (NEPs) operational in these countries (e.g. able to screen notifications and identify potential problems, in consultation with stakeholders)
- ◆ An improvement in the quality of "hard" infrastructure for the NEPs
- ◆ Provision of a manual and training material on best practice parameters for improving SPS co-ordination

The **first phase** of this project called for a preliminary assessment of the needs of the people and institutions who would be involved in each country in improving the flow of information, analysis and dialogue on SPS standards and issues, especially between WTO and the stakeholder at the national level. This was completed by the fourth quarter of 2005.

The **second phase** was to be implementation of improvements. That is the subject of this report.

The **third phase** will involve reassessment and final reporting. Subject to the availability of funding, the **fourth and final phase** will consist of an ex-post evaluation.

II. Recap of Phase One

A. Phase One Background

Tasks defined for the Assessment Phase included: (a) identifying all relevant SPS issues—whether technical, institutional, regulatory, or political; (b) finding and interviewing organizations that have a legitimate stake in SPS matters; (c) identifying development shareholders who might want to collaborate; (d) reviewing the history of similar efforts to bring the public and private sectors together around SPS issues; and then (e) defining and assessing alternative models of organization, coordination and information management that might improve the handling of SPS issues.

To accomplish these tasks, Abt formalized intermittent consulting arrangements with a lead host country consultant in both countries. For Paraguay, the person chosen was Ing. Agr. Jorge Gattini (B.S. in Agriculture, M.S. in Agricultural Economics, M.S. in Applied Environmental Economics). For Sri Lanka, the person selected was Dr. Srilal de Silva (B. Sc. in Chemistry, M.Phil. in Biotechnology, Ph.D. in Biotechnology).

National Project Coordinator Jorge Gattini and Abt Project Director John Lamb began the fieldwork in Paraguay in March of 2005. The tsunami in Sri Lanka forced a delay in start-up there until May, when National Project Coordinator Dr. Srilal de Silva and SPS Expert Dr. Percy Hawkes began the actual fieldwork.

In both countries, substantial desk analysis preceded the initial interviews. This enabled the team to gain a general understanding of the trading environment and historical trends in food and agricultural exports, to start defining stakeholder categories and entities in both the public and private sector, and to begin identifying the main SPS-related issues.

Then actual interviews were conducted. Interviews took about two weeks of intensive effort by the start-up teams, followed by a 6-8 week period of more intermittent interviewing of distant or hard-to-reach stakeholders, and then another intensive week of follow-up interviews. More than fifty key informants were interviewed in each country, mostly two or three at a time.

In the case of Paraguay, at the request of the Vice-Minister of Agriculture, the team delivered a seminar on food and agricultural standards in general, and SPS in particular, to about 40 additional people who were mostly from the government.

Within the public sector, the interview process generally began with the entities officially designated as National Notification Agency and National Enquiry Point(s) for WTO SPS matters. The national contact points for animal health, plant health and food safety that serve as counterparts to OIE, IPPC, and Codex Alimentarius were next. Then came interviews with senior management and technical staff from the national standards institute. After that, it was relevant officials from the various line ministries (agriculture, fisheries, environment, health, and/or trade) that deal with SPS issues. Finally the directors and information services managers of the export/investment promotion organization(s) were visited, as appropriate.

Within the private sector, meetings were first arranged with both apex organizations for agriculture, commerce, and trade, then with sub-sector, industry, or commodity-specific associations, and lastly with an occasional regional or rural development entity.

To the extent possible, an effort was also made to identify private advocacy organizations in civil society that might have interest in SPS issues. In both Paraguay and Sri Lanka, the team found a few environmental non-governmental organizations (NGOs) that were concerned with pesticides, but most were involved more with non-SPS issues such as biodiversity, environmental protection, or genetically modified organisms. No consumer advocacy organization of significance could be identified in either country.

The field teams also had productive exchanges with officials and/or project managers representing various international agencies of relevance, among them the World Bank, Inter-American Development Bank, Asian Development Bank, FAO, the European Union, USAID, DFID, GTZ, and IICA. In both countries major donor-funded programs were identified in the areas of competitiveness and agricultural diversification. The project leadership expressed interest in collaborating, which is important for capacity building, outreach, and ultimate sustainability.

B. Phase One Findings

1. Concerning the National Notification Authorities

The NNA in Paraguay was/is located in the Ministry of Foreign Relations (*Ministerio de Relaciones Exteriores*), specifically in the WTO Reference Center (*Centro de Referencia OMC*) of the Office of Multilateral Economic Organizations (*Dirección de Organismos Económicos Multilaterales, i.e. DOEM*). The office is well staffed, equipped, and connected. It receives notifications from WTO on a regular basis and forwards them electronically within a day or two to the main stakeholders within the government. Depending on the content, these may include the Ministry of Agriculture and Livestock (*Ministerio de Agricultura y Ganadería*), the Ministry of Public Health and Social Welfare (*Ministerio de Salud Pública y Bienestar Social*), Paraguay's two National Enquiry Points, or other governmental agencies.

As of STDF19 start-up, virtually no feedback on SPS measures proposed or enacted by other WTO Members had passed from the Paraguayan NNA back to the WTO SPS Secretariat or its Members. Nor had the DOEM yet notified WTO of any proposed or actual changes in SPS measures by Paraguay itself. However, the officials who manage this office were well aware of that situation, and requested training through STDF 19 to help them better fulfill notification commitments under the SPS Agreement. (As will be shown, notifications increased dramatically after STDF19 began).

In the case of Sri Lanka, WTO records at STDF19 start-up showed the NNA of record to be the Office of the Director of Environmental and Occupational Health (E&OH) within the Ministry of Health, Nutrition and Welfare. Yet interviews revealed that the Department of Foreign Trade (DFT) within the Ministry of Commerce and Trade had become the *de facto* NNA. To avoid confusion, the consultants suggested formally advising WTO of a change of NNA, but as of this

writing it has not happened.

The individual responsible for WTO matters at DFT when STDF19 started had had good relevant experience, including a prior posting to Geneva in the Sri Lankan diplomatic service. However, in 2006 she was to take a post in Australia, which was to leave a gap.

Notifications from WTO generally reached the E&OH and DFT in Sri Lanka in hardcopy form via diplomatic pouch, even though DFT has a computer with Internet connection available in its WTO Reference Center. It seemed that notifications were simply piling up, for lack of lower level staff or technical capability to sift through and allocate them by main topic area. However, at least some student volunteers at E&OH were beginning to organize them by date and topic.

Phase One interviews also revealed that little or no information on SPS matters emanating from WTO or its Members was being sent out by DFT or E&OH to other governmental stakeholders, even to the NEPs and national contact points for OIE, IPPC and Codex. Nor was feedback routinely coming back. As far as the consultants could determine, neither the E&OH nor the DFT had ever notified WTO of proposed or actual changes in SPS measures by the Sri Lankan government. (Once again, this subsequently changed, as will be explained below).

2. Concerning the National Enquiry Points

Under the SPS Agreement, each Member must designate a National Enquiry Point (NEP) to answer questions coming from WTO itself or from Members. While in theory there should be a single NEP for all three SPS areas, over time some Members have elected to designate two (i.e. human health and life versus plant/animal) or three (i.e. one each for human, plant and animal matters) NEPs. Since fisheries and derived products straddle concerns of both human and animal health and life, countries that have a strong and independent fisheries/aquaculture sector might even elect to name a fourth NEP.

As of STDF19 start-up, Paraguay's two official NEPs were both located within the Ministry of Agriculture and Livestock (*Ministerio de Agricultura y Ganadería, i.e. MAG*). The official NEP for plant health was the *Dirección de Defensa Vegetal*, while the NEP for animal health was the *Dirección de Protección Pecuaria*. Although both offices still exist, actual NEP operation has been subsequently been taken over by two agencies that became autonomous in early 2005. The *de facto* NEPs in Paraguay then became SENACSA (*Servicio Nacional de Calidad y Sanidad Animal*) and SENAVE (*Servicio Nacional de Calidad y Sanidad Vegetal y de Semillas*). Paraguay does not have a separate NEP for food safety, yet its Codex committee in effect plays that role, led by INTN.

In the case of Sri Lanka, the Food Control Administration Unit of the Ministry of Health, Nutrition and Welfare had been designated the sole NEP. However, during the assessment we concluded that it did not have the mandate, the inclination, or the resources necessary to really play that role across all three SPS areas. As a result, enquiries coming into Sri Lanka about SPS matters from other WTO Members (or non-members for that matter) seemed to arrive more often via the Three Sisters, or else through direct communication between national contact points in trading partner countries.

If the Ministry of Health is to keep its official role, it needs a clearer mandate and more funding. Alternatively, one or more additional NEPs could be officially designated and notified to the WTO. In fact, because of the prominence of fisheries and the strong role of that Ministry, Sri Lanka might well be the first WTO member to nominate four NEPs.

3. Concerning the National Contact Points

Shortly after STDF19 started, the newly independent entities SENACSA and SENAve also began to serve as national contact points in Paraguay for OIE and IPPC, respectively. Meanwhile the national contact point for Codex Alimentarius remained the national standard-setting and metrology body *Instituto Nacional de Tecnología y Normalización*. Although autonomous since 2005, at which point its name changed to *Instituto Nacional de Tecnología, Normalización y Metrología*, INTN kept close ties with the Ministry of Commerce, which has more to do with product identity, quality, and TBT issues than with SPS. During start-up we noted some consternation in the air as to why INAN (*Instituto Nacional de Alimentación y Nutrición*), which belongs to the Ministry of Public Health and Social Welfare, was not serving as national contact point for CODEX matters (and even as one of three NEPs for WTO purposes).

All three SPS contact points in Paraguay were found to have well-equipped offices with computers and Internet connections (at least dial-up speed). They also have staff designated to handle international and domestic SPS issues, including standards and notifications. However, during the assessment phase it became clear that additional public sector capacity building was needed and desired in Paraguay, especially for SENAve, which was only legally constituted in April of 2005. SENAve was not as strong as SENACSA because: (1) it's mandate covers many more product categories; (2) there is less history of collaboration with the private sector in plant agriculture than in animal agriculture; (3) there are no really strong, broad-based private sector counterpart associations that straddle multiple crop-based industries; (4) the SPS threats are generally neither life-threatening nor industry-threatening; and (5) practitioners of plant agriculture in Paraguay had weaker relationships with homologous organizations in target markets.

Since the cattle sector in Paraguay was so strong already, and it was well represented through the *Asociación Rural de Paraguay* (ARP), the assessment team concluded that there was no clear need for STDF 19 to provide anything other than WTO information to SENACSA. On the other hand, although it had no official designation as NEP or national contact point, we concluded that INAN should be given some assistance under STDF 19 because of its logical and de facto role in the food safety area.

Turning to Sri Lanka, the national contact point for food safety and CODEX matters was and is still the Office of the Chief Inspector of Food and Drugs within the Food Control Administration Unit of the Ministry of Health, Nutrition, and Welfare. This office does receive all CODEX notifications, but lacks the funds necessary to attend CODEX meetings.

Since seafood and aquaculture products are major exports for Sri Lanka, and the main market is

the EU, some years back all responsibility for that sector and that market passed to the Ministry of Fisheries. This included not just extra-SPS matters such as resource conservation and biodiversity, but also food safety as it relates to fish products for export.

The Sri Lankan government apparently wants the Ministry of Fisheries take care of both WTO and CODEX food safety concerns for exported seafood and aquacultural products, while the Ministry of Health, Nutrition and Welfare retains responsibility for food safety with respect to all other agri-food product segments.

Meanwhile the OIE contact point for animal health in Sri Lanka is the Office of the Director of Animal Production and Health in the Ministry of Agriculture. This office receives regular communications from OIE, both electronic and in hard copy, and it seemed to have adequate human and physical resources to play its desired role.

Lastly, for plant health matters, the IPPC contact point was identified as the Office of the Director of Seed Certification and Plant Quarantine, which again is part of the Ministry of Agriculture of Sri Lanka. Unfortunately this office, which is located in Kandy rather than Colombo, lacks regular access to IPPC materials and databases. Moreover, the assessment team found that it has only intermittent Internet service, and does not have the resources necessary to manage required plant health information nor or to deal effectively with all of the private stakeholder groups involved in crop production and trade.

4. Concerning SPS Committee Arrangements

When STDF 19 began, neither Paraguay nor Sri Lanka had an operational national mechanism for engaging in public-private dialogue and consensus building around SPS matters. Nor did either country possess a standing, functional interagency SPS committee that could bring together for policy analysis and decision-making all government entities that are cognizant of and responsible for the full range of SPS matters.

While Sri Lanka had nominally created an inter-ministerial SPS committee, which was supposed to meet on a quarterly basis, we found that it was only meeting sporadically. While Paraguay had a very strong Codex committee, that country had no national SPS committee capable of covering all three SPS domains.

Actually, at the start of STDF19, the idea of having a mixed public-private or even purely public National SPS Committee as originally envisioned in the terms of reference did not seem to be a felt need in either target country. There was much more interest in national coordination between public and private stakeholders in a vertical sense, i.e. within plant agriculture or animal agriculture or food safety.

Yet we also found that in both countries national coordination between government and private sector was happening naturally for at least one major subsector. For Paraguay it was the cattle industry, which had set up an emergency committee after the 2001-2002 outbreak of hoof-and-mouth disease (HMD). Having succeeded in saving the industry and reopening regional and global export markets, it had begun to meet once a week to deal with any and all SPS issues that

might affect beef or dairy, and sometimes other livestock-based value chains. In Sri Lanka it was the seafood industry, which had formed a strong public-private coordination mechanism in response to EU HACCP requirements for all incoming shipments of fresh chilled or processed seafood products.

5. Concerning SPS Information Management

We found that WTO notifications and other information do reach the NNAs in both countries, but more quickly in Paraguay than Sri Lanka. Although Paraguay's NNA did not really sort or filter the notifications before passing them on, at least it did distribute them fairly quickly to the NEPs and other agency stakeholders. By contrast, the NNA in Sri Lanka apparently had not been passing them on at all.

Governmental agencies and individuals involved in SPS matters generally see their roles as predominant, and sometimes become superior, territorial or defensive about them. Not all officials were willing to share information or solicit feedback in an entirely open and transparent way. Obviously this can impede public-private dialogue, as well as cooperation across public agencies.

In neither country did the consultants find evidence of SPS-related information or commentary regularly flowing back from the NEPs and other stakeholders to the NNAs. Neither NNA routinely collected, assembled, interpreted, repackaged or communicated stakeholder reactions to WTO or Member proposals or actions. The only exception found was that of EU sulfur dioxide limits for cinnamon, where the Sri Lankan NNA was in fact instrumental in bringing the issue before Codex, and through Codex to the WTO SPS Committee. However, this was probably an anomaly, mostly attributable to the personal qualities and history of one person in the Department of Foreign Trade, as well as strong support from the spice associations.

In general, the assessment team found that SPS information flows more easily in both countries between the national contact points and their respective global standards-setting body (whether OIE, IPPC or Codex). Moreover, information exchange with the corresponding global leader seemed stronger for animal health matters than for food safety, and for food safety more than plant health.

Not surprisingly, SPS information flow was found to be more effective between national contact points in the source and destination countries when significant trade was occurring or could begin to occur. If Brazil's oilseed crushing industry needs Paraguayan soybeans to maintain high levels of capacity utilization, the bilateral dialogue between plant health agencies in Brazil and Paraguay on soy-related phytosanitary issues such as rust tends to get energized.

As was to be expected, information flow also tended to get better in response to emergency situations, especially when the very survival of the industry was at stake, or when market access was suddenly curtailed or threatened. The obvious example in Paraguay was HMD in cattle. Similar examples in Sri Lanka included sulfur levels and use of colorants in cinnamon, as well as aflatoxin in other spices.

In both countries public and private leaders acknowledged a joint interest in: (1) resolving animal or plant quarantine or food safety issues that prevent initial access to market access; (2) dealing with an outbreak of a pest or disease that can close a market already penetrated; and (3) knowing about and trying to prevent a change in regulations in important end-markets that could reduce their competitiveness as a supply source. Yet cooperation in resolving such issues had not proven to be automatic, even with respect to the sharing of critical information. Politics or personalities often interfered.

At project inception, Paraguay seemed to have developed more effective public-private partnerships for dealing jointly with the information needs surrounding such issues than Sri Lanka. However, this also varied by industry. For example, the cattle industry in Paraguay was much more successful than the soybean industry at achieving a productive internal dialogue on SPS matters, in part because it avoided a confrontational strategy.

Generally, we found that the bigger problems had stimulated the greatest advances in public-private dialogue and action around SPS challenges. Again this was not surprising, since the threat of extinction (of an industry) or economic catastrophe (such as sudden contraction in the export of a vital commodity) always tends to focus attention and force collaboration.

Time is often of the essence for SPS issues. Market access can change suddenly due to pest or disease or safety problems. Yet notifications of changes in SPS regulations or their application that pass through WTO often lag behind what is really happening in the marketplace. When a shipment had been stopped at the border, we found that the source countries tended to interact first with cognizant authorities in the target market, secondly with one of the world standard-setting bodies, and only lastly with WTO itself. Notwithstanding their legal obligations under the SPS Agreement, some countries may perceive notification back to WTO as less important, or at least less urgent, than dealing with the trading partner country directly. In intra-regional trade especially, much of what happens in SPS matters takes place only between homologous government agencies in the source and target countries.

Although WTO does offer a dispute resolution mechanism, which some government officials and industry leaders in Paraguay, Sri Lanka or other developing countries may be generally aware of, the assessment team found that stakeholders tended to see it as a last resort. Instead they generally said that reforms can be achieved faster by elevating SPS disputes to the political level within their respective countries, than by going all the way to WTO as final arbiter. That implies that it may be more important to get critical SPS information to front-line negotiators and the politicians who back them, rather than to WTO itself.

Although accurate and timely information about SPS measures proposed or adopted is crucial to opening up and preserving foreign markets, most people interviewed express concern about their country or individual ability to access it promptly, interpret it correctly, and deal with it appropriately.

While the NEPs in Paraguay and Sri Lanka seemed to understand the distinction between quality and SPS standards, most stakeholders did not. They perceive them to be synonymous, or at least bundled. As a result, STDF19 emphasis on SPS matters alone did not always resonate with the

private players we interviewed, nor with trade development programs or potentially supportive donors. They seemed worried about the broader issue of dealing with emerging standards of all kinds--not only SPS but also quality, environment, fair trade and so on.

Official standards do still predominate in the animal health arena, partly because there are no gray areas: the product either passes government inspections at the border or it doesn't. Yet the situation appeared to be different for plant health. Receivers of plant products generally still rely on governmental inspection at the border, but when the response to a problem is a quarantine treatment such as fumigation, the resulting degradation in quality or condition becomes a question of private standards rather than public.

C. Implications Drawn from Phase One

Given all of the above findings, after the initial assessment the consulting team concluded that the challenge underlying STDF19 goes far beyond the narrow issues of information dissemination and feedback between the NNAs and WTO or its Members. The true challenge is how to help stakeholders in target countries better manage information about standards to become more competitive in international agricultural trade. Adoption of that viewpoint has many implications for design and implementation:

1. In the food safety area especially, private standards are gradually eclipsing public ones because they are more stringent and involve an ever-increasing share of trade value. Unofficial yet very real private requirements for GAP, GMP, HACCP, and third-party certification are becoming de facto market access and competitiveness issues. As a result, especially during the last decade, food export enterprises all over the world have been devoting as much or more time to private standards as to official public standards. It follows that an exclusive focus on WTO information flows on SPS issues, or even flows of SPS information between the Three Sisters and the national contract points, misses a significant portion of what actually interests the private sector.
2. Improvement in the capacity of NNAs to receive, filter, allocate and distribute information arriving from WTO or Member States, then to better provide feedback, is obviously desirable and necessary. Yet much of what officially occurs in the SPS arena happens between a national contact point and its corresponding standard-setting organization, or between similar contact points in two countries that trade with each other, or between the national contact points in a single country and the technical agencies and private stakeholders they work with. So the WTO-NNA link must be seen as part of a larger information system of which it is just a segment
3. WTO content on SPS matters is not sufficiently robust, frequent, compelling, or actionable enough to warrant a dedicated management information and feedback system. While content coming from the Three Sisters is much more substantial and relevant, even then it does not justify a new system, because it is already flowing to the national contact points fairly well, and there is usually some feedback occurring. Adding SPS content issued by the target markets—for instance how to gain admissibility for a new crop or labeling and licensing requirements for a processed food product--might be enough to justify a dedicated system. Broadening the scope even further to cover all standards that affect trade in food and agricultural

products would certainly make a new system sufficiently important and useful to justify a significant effort, because key informants in both countries express interest in a one-stop shop customized to their country's needs.

4. More meaningful engagement by the private sector in the SPS arena will require better information flow and coordination of resulting actions. Yet a pre-condition to improving information exchange and coordination of actions is consciousness-raising regarding the importance of SPS and other standards to success in international food and agricultural trade.
5. As a general principle, access to and control over information of economic relevance should reside within or close to those who are most affected economically, whether positively or negatively. That means that the private sector should have much greater responsibility over SPS information than it has had historically, at least as far as official standards are concerned.
6. Yet an entirely new information system, however comprehensive it might be with respect to SPS matters in particular or food and agricultural standards in general, is not likely to work because it will not attract sufficient "traffic", i.e. visits from private or public stakeholders. It seemed preferable to link the new system seamlessly to other web-based private association sites that already get considerable traffic, and to feed standards-related content into their pre-existing distribution systems to better reach association members and other interested publics.
7. In both Paraguay and Sri Lanka, various web-based information services are already set up and managed from within the private sector, both by apex organizations such as the Chamber of Commerce in Sri Lanka or sector-specific organizations such as the *Asociación Rural de Paraguay*. Since they already provide content of many different kinds to a broad constituency, the incremental costs of feeding additional SPS content into their system would be relatively low. And they seem interested in adding such content, because it will enhance the relevance of their existing communications vehicles.
8. While web-based information delivery is increasingly effective, to some extent in Paraguay and even more in Sri Lanka, not all economic actors of significance have ready access to or make use of the Internet. Ideally then, even a web-based system should be supplemented by additional means of reaching members, which may mean SMS text messaging alerts that draw people into a central office or documentation center, or else broadcast faxing.
9. If the goal is not only to push information farther out into the private sector, but also to pull responses back from them, the ideal system would also make provision for easy response, probably in the form of point-and-click email feedback.
10. Both the push and pull functions require intermediate filters, part automated and partly accomplished by human intervention, to assess relevancy, assign priority, and provide value-adding interpretation. This is true at all points in the system: NNA, NEP, national contact point, apex organization, and private association.
12. Until the design of a new national systems is completed and tested, it will not be possible to conclude definitively the actual market, the extent of use, the optimal content, or whether it

will be technically and financially sustainable.

13. Since better management of SPS information requires resources, any proposal to change mechanisms has to take into account the likely investment and recurring costs associated with the new model, and also seek to identify likely sources of financing, whether public, private or from donors.

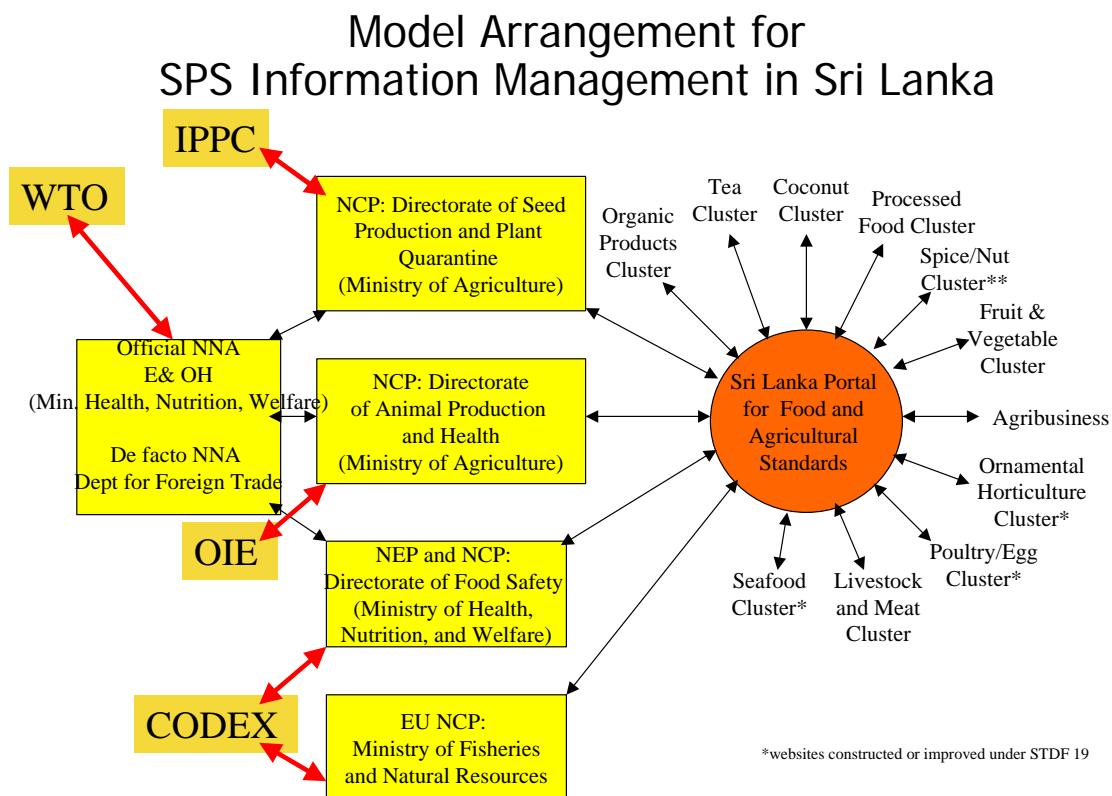
III. Moving Toward a New Model for Stakeholder Involvement and SPS Information Management

Given all of the above, the consultants proposed and vetted in each country a model arrangement for SPS stakeholder involvement at the national level that would have the following elements:

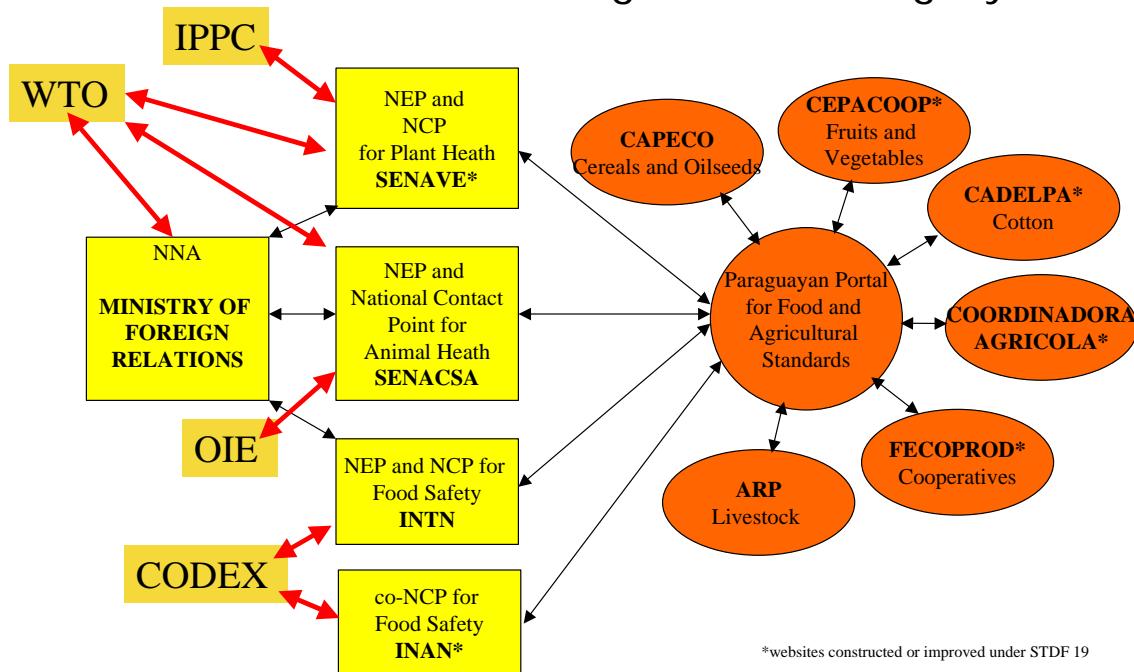
- ☞ A significant stakeholder workshop and follow-on meetings in each country, built around the theme of “Dealing with Emerging Standards in Food and Agricultural Trade”. This sequence would be used as the mechanism for raising awareness of and interest in the field of agri-food standards as a critical element in competitiveness, and also to explain and perfect the concept of a web-based SPS information network
- ☞ Support for the establishment in both Paraguay and Sri Lanka of a web-based portal tentatively dubbed National Portal for Food and Agricultural Standards. Each one to be linked: first, to relevant external sites already managed by WTO, the Three Sisters, FAO’s International SPS Portal, and other resources; secondly to the NNA and NEPs in that country; thirdly, to relevant apex organization sites in that particular country; and fourth, to private associations that represent key trading sectors or value chains or regions of the country. (see enclosed powerpoint slides, in which current or likely NNA, NEP and focal point roles are assumed, but linkages to WTO and the Three Sisters are assumed but not drawn because of visual complexity)
- ☞ Support for the establishment of new websites for selected associations in key value chains, or for the fortification of existing sites to make them work better within this new system
- ☞ Very targeted training or the gatekeeper staff at each choke point in the above system, so that they can better perform the functions of relevancy checking, allocation by topic, response to questions, analysis of responses, and management of a consensus-building process on key issues where the entity in question chooses to take a position
- ☞ Provision of limited capacity-building (i.e. training and technical assistance) for the NNA, some of the NEPs, and selected leading organizations in the private sector
- ☞ Support for the establishment of regular SPS working group meetings between public and private sector at the level of key commodities or subsectors, and possibly at the level of the three main SPS areas (except in animal health, where it is already working), but not necessarily across all SPS areas (except perhaps around the theme of crisis management)

Since submission of the Phase One report, the conceptual model for national SPS information systems in each country has undergone some changes. First, official versus de facto designations as to National Notification Agency, National Enquiry Point, and National Contact Point have been clarified as appropriate. Second, the number and name of satellite clusters has been modified where necessary to reflect interim progress. These changes were due to various factors: (1) differing levels of interest and “buy-in” expressed by some of the entities originally contemplated as full participants; (2) recognition on all sides of the need to upgrade some of the NEP or NCP websites in order to enable them to do their job better; and (3) funding constraints not yet resolved within the WTO SPS Secretariat and Committee.

As of this writing, the information system designs toward which STDF19 is working can be represented pictorially by the two diagrams presented below.



Model Arrangement for SPS Information Management in Paraguay



As readers may have noticed, there are some differences between the models, which largely derive from differences in the institutional structure of each country. For example, Sri Lanka continues to have some ambiguity of roles in terms of the NNA designation, because although the Department of Foreign Trade in the Ministry of Commerce and Trade is the entity that interacts directly with WTO, the Office of the Director of Environmental and Occupational Health (E&OH) within the Ministry of Health, Nutrition and Welfare has been notified as NNA to WTO. On the other hands, Paraguay also has an ambiguous situation with respect to the NEP for food safety. None has actually been notified to WTO, yet INTN leads the national level Codex committee, and INAN has a more logical role there in a technical sense. Both countries have competing associations that overlap in terms of agro-economic scope. Sri Lanka has many more organizations per subsector or value chain than does Paraguay.

IV. Phase Two Implementation

This section summarizes what actually happened over the past year, in terms of the main elements of the approach set forth above.

A. Stakeholder meetings and workshops

Two different approaches to stakeholder participation were tried, to see which one worked better.

In the case of Paraguay, after initial individual and small group consultations, at the request of the Vice-minister of Agriculture a seminar of about 50 people from the public and private sector

was held in July of 2005. The theme was deliberately chosen as “Agricultural Diversification: Challenges from Globalization and New Approaches” in order to attract a broad audience, but embedded within the 2-hour presentation was a full explanation of what STDF19 and the need to better handle SPS information. (Annex Three contains a shortened, lower graphic version of the powerpoint in Spanish actually used). The audience reacted well, asking good questions and commenting that it contained a large array of interesting—and to many present—new information.

Then in December of 2005, after the Inception Report had been presented and approved by the Secretariat, a smaller meeting of public SPS stakeholders (NNA, NEPs, NCPs, IICA, FAO) was held to present, discuss and gain buy-in for the proposed national SPS information system. Over the course of two hours very useful feedback was obtained, which helped shape the final version of the portal especially.

In the case of Sri Lanka, a single large day-long conference was held in November of 2006, built around the theme of “Effectively Dealing with Emerging Public and Private Standards for Agri-food Products: Information, Commentary, and Compliance.” Since the model arrangement had been largely finalized by then, a more structured series of presentations and discussion was used to raise consciousness about the importance of standards, explain the differences between public and private standards as well as between TBTs and SPS standards, describe the WTO and STDF 19, and only after all that to introduce the Model Arrangement. As Annex Two shows, the presentations given included:

- *Overview of Agri-food Standards-Meaning, Significance and Trends*
- *Effectively Dealing with Emerging Public and Private Standards for Agri-food Products: Information, Commentary, and Compliance*
- *The TBT Agreement versus the SPS Agreement: What are the Differences?*
- *The Challenge of Private Standards in Agri-food Trade*
- *Dealing with the Information Flow relating to Official SPS Standards*
- *Using Existing Tools*
- *Moving Toward a Web-based National SPS Information System for Sri Lanka*

Since much more time was taken under this approach, and both regulatory and private sector leaders participated, it seemed to be more effective.

B. Creation of a web-based national SPS portal

Consistent with the findings of the initial assessment, work proceeded during Phase Two on the design and launch of a web-based national portal for agri-food standards, especially SPS standards. In order to make the portal as compatible as possible with the International Portal on Food Safety, Animal and Plant Health (IPFSAPH), which FAO took the lead in creating with the support of WTO, OIE, IPPC, and Codex, the same basic structure was used. However, as Annex One shows, some of the tabs, many of the topics and links, and a large part of the underlying database of documents had to be changed to better reflect the needs and interests of stakeholders in Paraguay and Sri Lanka. The two portals are currently being debugged, and will be formally launched this month, with additional content to be added over the next two months.

C. Creation of new websites for selected associations in key value chains

Although the initial idea had been to just create new websites for as many as five key agribusiness associations in each country, stakeholders in Paraguay actually felt that two of the key institutions in their SPS system needed new websites. So STDF 19 supported entirely new sites for both SENAVE (plant health NEP and NCP) and INAN (de facto NCP for food safety). Both sites are up and running, and can be seen at: <http://www.senave.gov.py/> and <http://www.inan.gov.py/>.

In addition, STDF 19 supported the design and launch of four more websites for leading associations. These include CADELPA (cotton), FECOPROD (federation of agricultural cooperatives, mostly of smallholders), Coordinadora Agricola (umbrella organization of smallholders, producing multiple plant and animal products), and CEPACOOP (fruits and vegetables). All four sites are currently operating and can be visited at: www.cadelpa.com.py, [http://www.fecoprod.com.py/](http://www.fecoprod.com.py), [http://www.coordinadoraagricola.org.py/](http://www.coordinadoraagricola.org.py), and [http://www.cepacoop.com/](http://www.cepacoop.com).

As far as Sri Lanka is concerned, because of the tsunami, and an intentional lag behind Paraguay, developments there are somewhat delayed. Five associations websites are currently under construction, and will be finalized and launched this month. They include: Sea Food Exporters Association of Sri Lanka; Spice & Allied Products Producers & Exporters Association (SAPPTA); Spice Council; Sri Lanka Floriculture Produce Exporters Association; and All Island Poultry Association.

Once all of the above sites are up and running, tweaks will be needed to make sure they all interconnect properly, and to ensure that pass-through functionality for WTO materials is working well, and that email response systems are manned and operating. This will require about six more weeks in total.

D. Targeted training for the gatekeeper staff in the above system

In the course of site preparation, website developers have already been training the individuals responsible for each site. Since the sites are almost all kept at a remote server located in Texas, which has redundant capacity, no maintenance of an actual server is required. Thanks to a simple program designed by the main developer in Paraguay, uploading of additional documents and creation or correction of links is very easy for authorized users.

Nevertheless, assuming the additional funding requested last October is forthcoming from WTO, more training would be product, especially for the various associations. SENAVE and INAN have already assigned fully competent people to the task of maintenance.

E. Capacity-building (i.e. training and technical assistance) for the NNA, some of the NEPs, and selected leading organizations in the private sector

In the case of Paraguay, a one-day training session on notification procedures for the staff of the

NNA and NEPS was carried out in the middle of 2006 by Ing. Aristides Raidan, well-known to the SPS Committee. Since Sri Lanka's NNA is in flux, without fixed staff, it has not been possible to conduct specific training yet, but it would be desirable to do so as soon as possible. However, because funds originally planned for this have been allocated to development of the portal and websites, additional funding is needed.

F. Support for the establishment of regular SPS working group meetings

Several months after STDF 19 began, the NNA, NEPs and NCPs in Paraguay voluntarily decided to form a national SPS committee to better interface with this project and others. With the support of IICA, the government passed a decree in late 2005 formally establishing a national coordinating committee. It has been meeting regularly, and now serves as the main counterpart to STDF 19.

Although theoretically a national SPS committee does exist in Sri Lanka, it has not been meeting regularly, apparently for lack of a clear reason to do so. However, a large \$15 million World Bank project for Highly Pathogenic Avian Influenza (HPAI) has been signed. Since AI inherently cuts across health and animal agriculture, the advent of this project provides hope and reason for a national SPS committee to formally get established, as well as financial support for one. If STDF 19 is extended through early April, as requested by the contractor, one of the tasks in the next several months will be to work with officials involved in the AI project to try to use it to revitalize the national SPS committee.

V. Lessons Learned and Issues to Address

A. Conceptual Approach

1. An SPS information network that interconnects a national portal backwards with the WTO, the three standard-setting organizations, the NNA, the NEPs, and the NCPs, as well as forwards to the websites of leading associations in agriculture continues to hold promise of substantially improving information flow in all directions, and in facilitating stakeholder awareness and participation. Initial results seem positive, but more time must pass to be sure.
2. Most officially generated SPS content—and virtually all WTO content—is of consistent interest only to regulators, industry leaders and consultants, so this is primarily a wholesale operation. Nevertheless, to the extent that SPS and WTO content can be bundled with information on dealing with emerging standards as a pre-condition to greater competitiveness, this can have retail appeal to private economic actors of all sorts.
3. Content development and incorporation is a continuing task, that cannot be approached passively. It requires on-going attention by individuals charge with the task.
4. Conversion of a web-based system from a simple repository of information to a vibrant two-way communications system, and eventually a virtual network that interconnects all stakeholders, will take more time and promotional effort than originally anticipated

5. Dealing more effectively with SPS requires not just better information flow but also better interpretation and ability to take appropriate action, so WTO's need for better handling of notifications is fundamentally a trade capacity problem.
6. Since some NNAs and some NEPs are more capable than others, a different level and mix of trade capacity building assistance is required for each country. The assistance must be customized.
7. Since the TCB needs of some NEPs exceed the resources available under projects like STDF 19, an additional effort should be made by WTO or the government to arouse interest among other donors—especially the EU, then IDB or ADB, then bilateral donors such as USAID—and to leverage their funds.

B. Practical Challenges

1. Design and maintenance of a national portal is a major effort, for which no funding was allocated in the original STDF 19 budget. To replace funds reallocated from other areas, especially follow-up training and technical assistance, a modest amount of additional funding was requested.
2. Aside from making sure that the individual portals and websites supported under STDF 19 all work in and of themselves, for purposes of this project it is their networking that is of equal interest. To make sure that works requires careful attention to details of linkages and communication, as well as substantial prodding.
3. Although the procedure for updating content and linkages has been made fairly simple, decisions as to what to change require higher level knowledge of the SPS field than many client entities have available. That is especially true for associations, whose staff is not always as attuned to SPS issues as they should and could be.
4. While operation of the STDF-19 sites has been ensured for all of 2007 via forward payment of web hosting services and the contractor's own commitment to update technical content for that same period, the sponsoring organizations will need to take over this modest financial responsibility sometime this year. So far they all seem willing and able to do so, but the dates have not yet come due.

C. Achieving Sustainability

1. Public versus Private Responsibility

Since SPS matters encompass public, private and mixed goods, it follows that responsibility for them should also be mixed. Certainly the proper and legal role of national government in dealing with WTO, the Three Sisters, and other governments should be respected, along with the responsibility of government to protect human welfare and the environment. Yet the role of the private sector in appropriately shaping and then complying with SPS standards must also be respected. It is important to achieve a balance between public and private roles and

responsibilities.

2. Charging for Data or Use

Precisely because SPS has a public goods character in most cases, and because it is so important, it is very difficult and probably not appropriate to charge for it. Therefore any system has to be supported financially either by the government, by the private sector associations, by donors and/or by advertising revenue that seeks to take advantage of web-based traffic.

3. Who needs it?

Basic to resolving the question of sustainability is stimulation of effective demand on the part of intended beneficiaries and users in both the public and private sector.

In the case of Paraguay, both SENAVE and INAN have already concluded that the need for institutional sites is real, and have demonstrated that conviction by assigning staff and resources to their websites.

It is too early to say for sure in the case of all the associations, but early indications suggest that they are willing to continue to feed information into the sites because they see them as a valuable service to members.

Sponsorship and upkeep of the national portals is probably the greatest challenge for the approach taken under STDF-19. The main options include: (1) seeking governmental funding or co-funding; (2) convincing a leading private sector chamber, federation, or development foundation to take it over; (3) combining it with advertising revenue. All of these options will be further explored and tested between now and April, assuming that the requested incremental funding and time are granted as requested.

Annex One:

Screenshots of Homepages from the Paraguay SPS Portal, Websites for
SENAVE and INAN, and Websites for 4 Associations

 12:53 AM

CALELPA - Cámara Algodonera del Paraguay - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address  <http://www.cadelpa.com.py/>

CALELPA
CÁMARA ALGODONERA DEL PARAGUAY



Principal

- > Acerca de la CADELPA
- > Empresas Asociadas
- > Algodón Paraguayo
- > Estadísticas internacionales
- > Normas y estándares internacionales
- > Sanidad Vegetal
- > Producción sostenible
- > Biotecnología en el Algodón
- > Conferencias y eventos
- > Enlaces de interés
- > Publicaciones

**Bienvenido a la web de la
CADELPA**

Cámara Algodonera del Paraguay

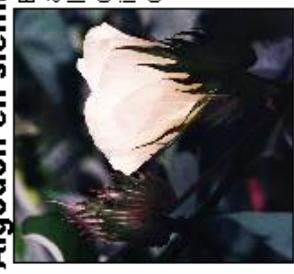
Publicaciones

- Senave hará un fuerte control en desmotadoras
- Nuevo titular del MAG con algodoneros
- MAG buscará desactivar movilización campesina y elevar subsidio al algodón
- Productores y Gobierno no logran acuerdo sobre precio de algodón
- Millonario subsidio del Ejecutivo no impide la movilización campesina
- PAIS, Campesinos piden 2000 guaraníes por cada kilo del producto
- Agricultura anuncia alza de canon a envíos del textil
- MAG estudia alza de impuesto para frenar la fuga de algodón al Brasil

Destaque

Algodón en siembra directa

Buscando levantar la producción agrícola los agricultores de la localidad de Yatayty del Norte, departamento de San Pedro, están implementando el sistema de siembra directa...



(+ mas)

CEPACOOP - Central Paraguaya de Cooperativas de Producción, Comercialización y Servicios Ltda. - Microsoft Internet Explorer

- X

File Edit View Favorites Tools Help

Address <http://www.cepacoop.com/>

Go Links BUSCAR



CENTRAL PARAGUAYA DE COOPERATIVAS DE PRODUCCIÓN, COMERCIALIZACIÓN Y SERVICIOS LTDA.

Principal

Bienvenido a la web de la CEPACOOP - Central Paraguaya de Cooperativas de Producción, Comercialización y Servicios Ltda..

La CEPACOOP es una organización que proporciona a los asociados de las cooperativas socias de la Central, medios para mejorar la producción e infraestructuras adecuadas para el desarrollo de los negocios de comercialización de los variados productos agrícolas ... [+ MAS](#)



Acerca de la organización

Antecedentes

Inocuidad de alimentos y sanidad vegetal

Matriz de Estacionalidad

Sostenibilidad

Calidad y condición

Normas Técnicas Internacionales

Normas Fitosanitarias Internacionales

Guías y Manuales

Industrialización de los Productos Hortícolas

Conferencias y eventos

Publicaciones

Newsletter

Enlaces

Contacto

Cotizaciones

Cotizaciones en el Mercado Central de Abasto

Piña: 20.000 Gs. la caja
 Tomate: Min 25.000; Max 30.000 la caja
 Banana: 5.000 Gs. la caja

Novedades

+ MAS

- Control de calidad de bananas paraguayas exportadas
- Exportación de banana generó este año US\$ 200 mil a dos cooperativas
- Ministro cree que en tres años se puede dejar de importar cebollas

Sitio elaborado por UPLOAD y ABT ASSOCIATES Inc. bajo contrato con la QMC
 < Diseño y programación= UPLOAD >

arriba △

Start

A screenshot of a Microsoft Internet Explorer window showing the website of the Coordinadora Agrícola del Paraguay. The page features a green header with the acronym C.A.P. and a logo of a tractor and sunburst. Below the header is a large image of a hand holding a small potted plant. The main content area has a green sidebar with links like 'Principal', 'Acerca de la CAP', etc., and a central column with sections for 'Misión', 'Valores', and 'Acerca de la CAP'. A right-hand sidebar contains a large image of agricultural fields. The Windows taskbar at the bottom shows various open applications.

FECOPROD - Federación de Cooperativas de Producción del Paraguay Ltda. - Microsoft Internet Explorer

- X

File Edit View Favorites Tools Help

Address http://www.fecoprod.org/ Go Links >

Federación de Cooperativas de Producción

FECOPROD

Principal Acerca de la FECOPROD Objetivos Servicios prestados a las Cooperativas Estadísticas Asociados Proyectos Inocuidad de alimentos Sanidad animal y vegetal Enlaces de interés Publicaciones Resoluciones INCOOP Educación Newsletter Contacto

Bienvenidos a la web de la FECOPROD Federación de Cooperativas de Producción Ltda.

Somos una entidad de segundo grado que cree y confía en la Producción Cooperativa Agropecuaria Forestal y en la sostenibilidad del medio ambiente.

Cooperativas Agrarias : Instrumentos del desarrollo sostenible donde no existen socios marginados ni pobres.

Destaque

Los sojeros se comprometen a cooperar en el combate a la inseguridad

Gremios de la producción y cooperativistas del interior del país se comprometieron en la fecha ante el ministro del Interior, Rogelio Benítez a trabajar en forma conjunta con las autoridades en la implementación de acciones contra... [\(+ mas\)](#)

Publicaciones

- Fecoprod entrega microcréditos
- Dan apoyo crediticio a centro cooperativo
- Volvió a bajar precio de carne vacuna al gancho
- Ganado caro paraliza industrias
- Supermercados no aceptaron oferta de carne de frigoríficos
- Merma triguera sería del 40%
- Mejor control de plagas
- MIC culpa a ganaderos y frigoríficos de desabastecer mercado

Start

Instituto Nacional de Alimentación y Nutrición - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <http://www.inan.gov.py/acerca.php>

buscar

REPÚBLICA DEL PARAGUAY
MINISTERIO DE SALUD PÚBLICA Y BIENESTAR SOCIAL

INSTITUTO NACIONAL DE ALIMENTACIÓN Y NUTRICIÓN

INAN



Acerca del INAN

Misión del INAN

El Instituto Nacional de Alimentación y Nutrición es una institución dependiente del Ministerio de Salud Pública y Bienestar Social, rectora en el área de alimentos y nutrición, que con recursos institucionales y el apoyo de organismos internacionales promueve, desarrolla y coordina acciones de carácter intersectorial y multidisciplinario, con el propósito de prevenir la mal nutrición y ofrece el acceso a una alimentación adecuada e inocua, para mejorar la calidad de vida de la población.

Visión

Institución rectora reconocida en el área alimentaria nutricional como ejecutora de acciones eficaces y equitativas que contribuyan al mejoramiento de la calidad de vida de la población.

Dirección General

Responsable de conducir las tareas relacionadas con Programas y Servicios por medio de acciones de Planificación, Coordinación, Normalización, Evaluación y Control, en consonancia con los objetivos y metas del M.S.P.y B.S., a través de sus direcciones:

-Programas de Nutrición
-Vigilancia de alimentos
-Laboratorio de Alimentos
-Administración de Finanzas
-Recursos Humanos

> Principal

> Acerca del INAN

> Dirección de Vigilancia de Alimentos

> Dirección de Programas en Nutrición

> Dirección de Laboratorio de Alimentos

> Inocuidad de alimentos

> Guías Alimentarias del Paraguay

> Guías Alimentarias para menores de 2 años

> Publicaciones

> Manuales

> Formularios

> Proyectos

> Galería de Fotos

> Investigaciones SISVAN

> Biblioteca INAN

> Lista de Correo

> Contáctenos

Start | 12:54 AM

Portal nacional sobre inocuidad de los alimentos y sanidad animal y vegetal - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://www.upload.com.py/portal/

Principal Fuente Producto Temas intersectoriales Tipo de información

Portal paraguayo de inocuidad de alimentos, sanidad animal y vegetal

Bienvenido

El portal paraguayo de inocuidad de alimentos, sanidad animal y vegetal facilita el comercio de productos alimentarios y agrícolas y apoya la ejecución del Acuerdo de medidas sanitarias y fitosanitarias (MSF) proporcionando un punto de acceso único sobre normas y regulaciones nacionales en la región de América Latina y el Caribe en relación con la inocuidad de los alimentos y la salud animal y vegetal.

Búsquedas frecuentes

- Normas del Codex
- Límites máximos de residuos - plaguicidas
- Límites máximos de residuos - medicamentos veterinarios
- HACCP
- Alergias de origen alimentario
- Semillas
- Residuos de plaguicidas, otros que LMR
- Buenas prácticas agrícolas (BPA)
- Buenas prácticas higiénicas (BPH)
- Leche y productos lácteos
- OGMs/Biotecnología
- Ánalisis de riesgos
- Aditivos alimentarios

Eventos

Fecha	Título
20/06/06	Comité Mixto FAO/OMS de Expertos en Aditivos Alimentarios (Residuos de Medicamentos Veterinarios) (JEFCA) (67a reunión)
03/05/06	Reunión preparatoria para un posible Tercer Foro mundial FAO/OMS de Autoridades de Reglamentación sobre Inocuidad de los Alimentos
01/05/06	Comité del Codex sobre Etiquetado de los Alimentos
24/04/06	Conferencia Regional para América Latina y el Caribe (LARC) (29a reunión)
24/04/06	Comité del Codex sobre Aditivos Alimentarios y Contaminantes de los Alimentos

Enlaces

(VER MÁS)

- IPFSAPH
- CAN
- COSAVE
- FAO
- FAO America Latina y Caribe
- IICA
- MERCOSUR
- NAPPO

Links >

Mapa del sitio | Buscar en el portal | Ayuda |

Start | Go | Links > | 3 Internet... | 2 Microso... | Microsoft P... | 12:58 AM

 : SENAVER :: Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address  http://www.senave.gov.py/

< Go Links > >

SENAVE

Servicio Nacional de Calidad y Sanidad Vegetal y de Semillas

>> Principal > SENAVER > Presidencia > Servicios > Contáctenos



NOTICIAS

SENAVE HARÁ UN FUERTE CONTROL EN DESMOTADORAS

El Servicio Nacional de Calidad y Sanidad Vegetal y de Semillas (Senave) reforzará el control en las desmotadoras, por indicación del nuevo ministro Ing. Agr. Alfredo Molinas, según reveló el titular de esa entidad autárquica, Ing. Agr. Edgar Esteche. "Vamos a trabajar en forma conjunta con funcionarios del Ministerio de Agricultura y de la Secretaría del Ambiente en el control, fiscalización y ..."

DESTRUYEN SOJALES QUE NO RESPETAN FRANJA DE SEGURIDAD EN LAS RUTAS

El Servicio Nacional de Calidad y Sanidad Vegetal y de Semillas (Senave), y la Secretaría del Medio Ambiente (Seam), iniciaron ayer la destrucción de las parcelas de soja que no se adecuan a las reglamentaciones vigentes sobre las franjas de seguridad. El operativo se inició en la zona de 3 de febrero del departamento de Caaguazú y destruyó ayer la primera parcela. Para hoy se prevé la destrucción de otras 10.

[todas las noticias +]

REGISTROS
Empresas y Productos

ORGANIZACIÓN MUNDIAL DEL COMERCIO

Manual - Uso y Manejo Seguro de Plaguicidas en Paraguay



Uso Y manejo seguro de plaguicidas en Paraguay

Portal Nacional para las normas Agropecuarias, Sanitarias y Fitosanitarias

Enlaces de Interés

Comunicados de prensa

Publicaciones

Licitaciones

Trámites

Estadísticas

Leyes

Decretos

Resoluciones

+ Noticias

> VERIFICAN SITUACIÓN DE SOJAL EN SAN PEDRO

> SENAVER REDUCIRÁ LOS PUNTOS DE INGRESOS DE

Start

1:01 AM

Annex Two:

Agenda and Powerpoint Presentations
from the 16 November 2006 Workshop in Sri Lanka

Effectively Dealing with Emerging Public and Private Standards for Agri-food Products: Information, Commentary, and Compliance

*A workshop sponsored by the World Trade Organization and National Partners
Holiday Inn, Banquet Room B, Colombo, November 16, 2006*

8:00am- 9:00am	Registration
9:00am - 9:15am	Introduction Mr. John E. Lamb, WTO Consultant
9:15am – 9:30am	Opening Remarks Mr. Neil Mahagederagamage, Deputy Director of Commerce
9:30am – 10:10am	Overview: <i>What do we mean by standards? What is the difference between public and private standards? Why do standards matter so much to global trade in agri-food products? How are standards promulgated and enforced? What are associated costs, benefits? Who pays?</i> Mr. John E. Lamb, Principal Associate for Agribusiness, Abt Associates Inc (WTO Consultant)
10:10am – 10:30am	Discussion and Q&A Session on Agri-food Standards
10:30am – 10:45am	Tea/coffee break
10:45am - 12:00pm	Understanding Official Standards: <i>What is the history and structure of the WTO agreements. What is the distinction between TBT's and SPS measures? What role do the "Three Sisters" play as standard-setting bodies? How do OIE, IPPC, and Codex standards influence national SPS standards?</i> Panel consisting of: Dr. Srilal da Silva, WTO Consultant; Dr. C.K. Shanmugarajah of the Department of Health; Dr. Mrs. K.K.S. Fernando of the Department of Agriculture; and Dr. S.K R. Amarasekera of the Department of Animal Health
12:00pm – 12:30pm	Discussion and Q and A Session on Official SPS standards
12:30pm-1:30pm	Luncheon Keeping the EU Market Open for Sri Lankan Cinnamon Speaker: Miss Ruwanthi Ariyaratna,

Assistant Director, Department of Commerce.

1:30pm-2.10pm

The Challenge of Private Standards in Agri-food Trade: *What is driving the emergence of private standards? Are there significant differences between fresh and processed food requirements? How do private standards vary between major markets and different channels of distribution? How have Sri Lanka players been coping?*

Panel consisting of:

Mr. John E. Lamb, WTO Consultant

Ms. Sunanda Weerasinghe, Sugan International

Ms. Chulan Senewiratna, Kelani Valley Canners

Mr. Maliek de Alwis, Ma's Tropical Food Processing Center

2:10pm – 2:30pm

Q and A on Private Agri-food Standards

2:30pm – 3:10pm

Dealing with the Information Flow relating to Official SPS Standards: *What are the roles of the National Notification Agency, the National Enquiry Points, and the National Contact Points for Codex Alimentarius, OIE and IPPC? What are the challenges? Who should take responsibility and take charge? Should there be an interagency SPS committee that meets regularly? How best to deal with complex SPS emergencies like highly pathogenic avian influenza or other zoonoses?*

Panel consisting of;

Dr. C. K. Shanmugarajah of the Department of Health;

Dr. Mrs. Kumudu Fernando of the Department of Agriculture;

Dr. S.K.R.Amarasekera of the Department of Animal Health; and

Mrs. Sepalika Wickramasinghe, Deputy Director of the Department of Fisheries and Aquatic Resources

3:10pm-3:30pm

Q and A on WTO SPS Notifications and Commentary

3:30pm-3:45pm

Tea/coffee break

3:45pm-4:00pm

Dealing with the Information Flow relating to Private SPS Matters: *What are the special challenges? Who are the main actors? Who should take responsibility and take charge?*

John Lamb, WTO Consultant

4:00pm-4:15 pm **Moving Toward a Web-based SPS Information System**

John Lamb, WTO Consultant

4:15pm-5:00pm **The Private Sector Viewpoint**

Panel consisting of selected association representatives:

Mr. Dilip de Silva, Floriculture

Mr. Sarath de Silva, Fruits and Vegetables

Mr. Tyeab Akbarally, Processed Foods

Dr. Wanasinghe, Poultry

5:00pm-5:30 pm **Closing Remarks**

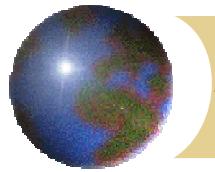
John Lamb, WTO Consultant

Officials representing the National Notification Authority (NNA)
and National Enquiry Points (NEPs)

"Effectively dealing with Emerging Public and Private Standards for Agri-food Products: Information, Commentary, and Compliance"

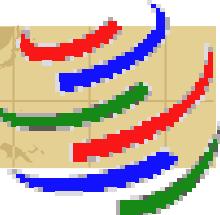


Solving problems, guiding decisions – worldwide



Background

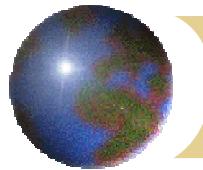
WORLD TRADE
ORGANIZATION



- This workshop is sponsored by the WTO
- WTO exists primarily to encourage and facilitate rules-based trading between member states

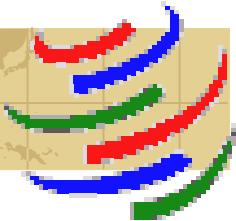


- Sri Lanka became a member in 1995
- 149 countries in total as of this moment



Background

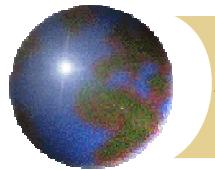
WORLD TRADE
ORGANIZATION



➤ WTO Agreements:

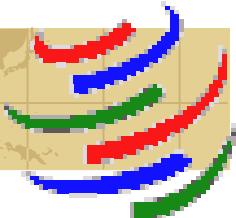
- Cover goods, services and intellectual property
- Spell out the principles of liberalization, and the permitted exceptions
- Include individual countries' commitments to lower customs tariffs and other trade barriers, and to open and keep open services markets
- Set procedures for settling disputes
- Prescribe special treatment for developing countries





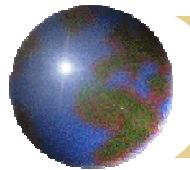
Background

WORLD TRADE
ORGANIZATION



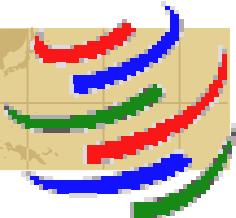
➤ Objectives:

- Raise standard of living;
- Ensure full employment;
- Achieve a growing volume of real income and effective demand;
- Expand production of, and trade in, goods and services;
- Contribute to sustainable development and environmental protection



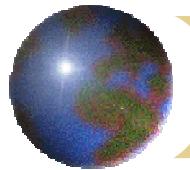
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WORLD TRADE
ORGANIZATION



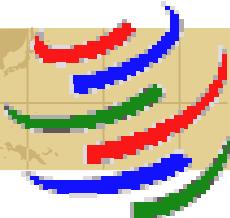
➤ Functions:

- ❖ Implementation, administration, and operation of the covered agreements;
- ❖ Provide a forum for negotiations;
- ❖ Manage dispute settlement;
- ❖ Conduct reviews of national policies;
- ❖ Provide coherence in global economic policy-making
- ❖ Make trade policies transparent by requiring members to notify the WTO about laws in force and measures adopted

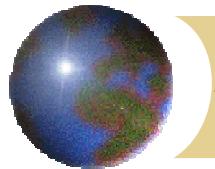


Background

WORLD TRADE
ORGANIZATION

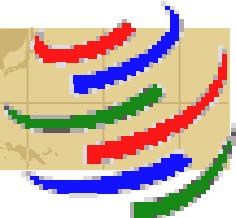


- Notification provisions allow members to:
 - ✓ Request full legal text of a notified measure
 - ✓ Ask for details on scientific basis
 - ✓ Ask for implementation details
 - ✓ Request special and differential treatment
(i.e. longer timeframe or technical assistance/training)

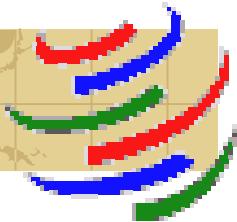
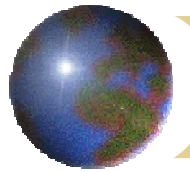


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WORLD TRADE
ORGANIZATION

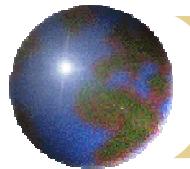


- Today we are concerned about agri-food trade
- One of the general provisions in GATT allows countries to protect themselves in terms of human safety, animal life and health, and plant life and health.
- There is also a specific Agreement on Sanitary and Phytosanitary Measures that covers these same three overlapping concerns.
- To assist Sri Lanka in implementing the SPS Agreement, the WTO is providing assistance via our project, which is called....



“Model Arrangements for SPS Stakeholder Involvement at the National Level”





Overall objective of STDF19

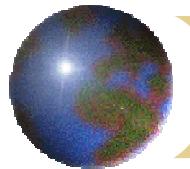
"improve the institutional capacity of the member country...

to work in an international trading system...

that applies demanding standards...

in food safety, animal and plant health"



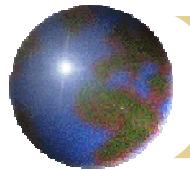


Purpose of STDF 19

- Improve SPS-related information flow as well as information sharing between the public and private sector...



...with positive spin-offs for market access

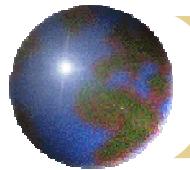


Specific task areas

- (1) To identify parameters for best practice in order to improve the co-ordination of sanitary and phytosanitary (SPS) activities in government departments and in the private sector at a national level;

- (2) To improve the technical capacity of government bodies to assimilate and respond to flows of SPS related information;

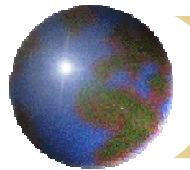
continued



Specific task areas (cont.)

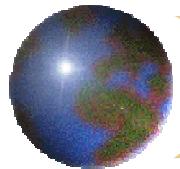
- (3) To improve the technical capacity of government bodies to assess the implications for national exports of new SPS measures or international standards developed by Codex, IPPC, and OIE; and

- (4) To establish consultative mechanisms between government and the non-governmental actors, particularly in the private sector.



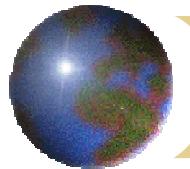
The WTO SPS Agreement...

- Says that a country has to provide information...
- ...but doesn't say clearly how a country should handle information emanating from other members, nor how to request info or make comments



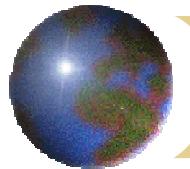
The WTO SPS Agreement...

- Calls for the establishment of a National Notification Agency and National Enquiry Point(s),....
- ...but is not clear on how they should operate, especially behind the border



The WTO SPS Agreement...

- Deals only with official standards...
- ...yet the WTO SPS Committee is aware that private standards in the agri-food area have become increasingly important



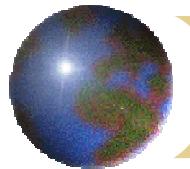
So today we'll discuss

→ Not just how Sri Lanka might deal more effectively with WTO SPS obligations and the standard-setting bodies to which the WTO makes reference....



FAO/ WHO Food Standards

CODEX alimentarius



So today we'll discuss

→ But also how Sri Lanka might deal more effectively with emerging private standards, such as

EUREPGAP®



For Primary
Producers



BRITISH RETAIL CONSORTIUM

Annex Three:

Paraguay Conference (July 2005)

*“Diversificación Agrícola en el Paraguay:
Desafíos de la Globalización y Enfoques Nuevos”*

Diversificación Agrícola en el Paraguay: Desafíos de la Globalización y Enfoques Nuevos

Presentación ante el Ministerio de Agricultura y Economía,
Asunción, Paraguay (12 de julio de 2005)



Solving problems, guiding decisions – worldwide

Realizada por John E. Lamb,
Asociado Principal-Agronegocios
Abt Associates, Inc.
Bethesda, Maryland



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Associates, Inc. Se reservan todos
los derechos

Temas a tocar

- 👉 Principales causas y efectos de la globalización del comercio agrícola internacional
- 👉 Desafíos para Paraguay
- 👉 Requisitos fundamentales para competir en los mercados externos a través del tiempo
- 👉 Enfoques alternativos para la diversificación



Principales causas de la globalización – al nivel del consumidor

- Expansión económica en los años Noventa en los EEUU e inicialmente en Asia => mayores ingresos per capita disponibles
- Cambios demográficos (“baby boom”, immigración, diversidad étnica) en los principales mercados de destino => mayor preocupación por la calidad y la salubridad de los productos, más variedad en la alimentación
- Ambos padres trabajando, familia sin pareja, multiples adultos => mayor valorización del tiempo libre, búsqueda de productos listos a comer sin mucha preparación, porciones más variadas
- Porcentaje mayor del consumo de alimentos fuera de la casa => rápido crecimiento entre los proveedores institucionales
- Auge en el turismo mundial => más interés en los alimentos exóticos

Principales causas de la globalización – al nivel de los canales de comercialización

- Revolución en las industrias de computación y telecomunicaciones => más información disponible sobre los patrones de consumo, así como también más posibilidades de ajustar la gama de productos y los inventarios en respuesta a cualquier cambio en demanda efectiva
- Para responder a la nueva demanda sentida y prognosticada, los detallistas y los distribuidores grandes querrían lograr una oferta estable durante todo el año y una gama más amplia de productos => búsqueda de productos de contraestación, tanto a nivel nacional como desde el exterior, así como también de nuevas presentaciones y de productos totalmente nuevos
- Expansión de las grandes cadenas hacia los mercados emergentes y los países en vías de desarrollo => cambios estructurales (reducción en el rol de los mercados centrales y las tiendas) en el sistema agroalimentario en muchas partes del mundo

Principales causas de la globalización – al nivel de los suplidores

- Aumento continuo en la productividad agrícola en los países más desarrollados => búsqueda de nuevos mercados que pudieran absorber los excedentes, presión ejercida por sus gobiernos para reducir la protección arancelaria mediante negociaciones de tratados
- Mayor énfasis en la apertura de nuevos mercados => presión para reducir las barreras técnicas, especialmente las sanitarias y fitosanitarias
- Necesidad de los productores y exportadores de ser más grandes para competir => temporadas más largas, extensión de su línea de productos, búsqueda de nuevos mercados regionales, formación de alianzas estratégicas

Principales efectos de la globalización

- Las ventanas de oportunidad más obvias se van cerrando
- El acceso a nuevos mercados se ha vuelto algo más fácil y menos costoso con las disciplinas acordadas en el Acuerdo sobre la Agricultura de la OMC, pero el nivel de competencia también se ha aumentado
- La tendencia hacia mayor concentración a todo nivel eleva las barreras contra la entrada de nuevas empresas y de nuevas fuentes de origen
- Al abastecerse de producto que viene desde lejos, a la fuerza los compradores tienen que dar más importancia al uso de normas y estandares, que sirven para bajar los costos de transacción y para reducir el riesgo de mercancía no aceptable

Desafío #1: Manejo apropiado de las normas



El concepto de normas es muy antiguo...

- El impulso de tener estandares se ha derivado de la necesidad de (1) definir condiciones de pago; (2) asegurar uniformidad; (3) evitar daños a la salud; (4) conservar materiales estratégicos; (5) facilitar la comercialización ordenada.
- En 1898 se fundó la Sociedad Americana para la Metrología y los Materiales (ASTM) en EEUU; el Comité Británico de Normas (BSC) en 1901; ambos enfocados en la ingeniería al principio
- En EUA, se promulgó el “Pure Food and Drug Act” y luego el “Meat Inspection Act” en 1906. La Oficina de Mercados (ahora USDA/AMS) fue fundada en 1913 después que la industria se dió cuenta que el uso de estandares facilitaba la comercialización de productos agropecuarios y elevaba los precios promedios recibidos
- La Organizacion Internacional para la Estandarization (ISO) fue creada en 1947 como la primera federación de entidades normativas

Todavía persisten muchas normas de calidad establecidas hace décadas....

- Estandar Universal para el Algodón acordado en 1924

Fiber Measurements

A description of each measurement included in USDA's official cotton grade follows:

Leaf Grade - Highly trained human classers determine the leaf grade by comparison with the practical forms of the Universal standards for the grades.

Fiber Length - Fiber length is measured on a beard of cotton fibers on HVI systems and is reported in hundredths of an inch and equivalent staple length in thirty-seconds of an inch. Length is a good indicator of yarn strength and spinning efficiency.

Length Uniformity - Length uniformity measures the degree of fiber length uniformity in a sample. Fiber length uniformity is related to spinning efficiency, yarn uniformity, and yarn strength.

Strength - The fiber strength measurement is made by clamping and breaking the beard of fibers with 1/8-inch gage spacing between the clamp jaws. The strength reported is the force in grams required to break a bundle of fibers one tex unit in size.. A tex unit is equal to the weight in grams of 1,000 meters of fiber. Fiber strength is closely related to yarn and fabric strength and to spinning efficiency.

Micronaire - The airflow instrument in the HVI system measures fiber fineness. Fineness and maturity are highly correlated within the same cotton variety. Fiber fineness affects yarn appearance, yarn uniformity, and yarn strength.

Trash - The trash measurement is made by a video trashmeter, which measures the percentage area of trash on the sample surface. This measurement provides an estimate of the total amount of trash in the bale.

Color - Color measurements are made by a colorimeter. The instrument measures grayness (R_d), which indicates how light or dark the sample is, and also yellowness ($+b$), which indicates how much yellow color is in the sample. Color gives an indication of the fibers' ability to accept dyes in the manufacturing process.



Las normas de calidad se evolucionan, pero lentamente...



Quality Standards

AMS

USDA

SEARCH

CANNED FRUITS

- Apples, effective October 17, 1953 ([PDF](#))
- Apple Butter, effective August 5, 1957 ([PDF](#))
- Apple Juice, effective March 11, 1982 ([PDF](#))
- Applesauce, effective March 11, 1982 ([PDF](#))
- Apricots, Regular and Solid Pack, effective May 12, 1976 ([PDF](#))
- Blackberries & Other Similar Berries, effective May 12, 1976 ([PDF](#))
- Blueberries, effective May 12, 1976 ([PDF](#))
- Cherries, RTP, effective May 12, 1976 ([PDF](#))
- Cherries, Sweet, effective May 12, 1976 ([PDF](#))
- Cranberry Sauce, effective March 19, 1951 ([PDF](#))
- Figs, Kadota, effective May 12, 1976 ([PDF](#))
- Fruit Cocktail, effective May 12, 1976 ([PDF](#))
- Fruit Jelly, effective September 3, 1979 ([PDF](#))
- Fruit Preserves (Jams), effective January 4, 1980 ([PDF](#))
- Fruits for Salad, effective June 20, 1973 ([PDF](#))
- Grapefruit, effective October 25, 1973 ([PDF](#))
- Grapefruit Juice, From Concentrate & Conc. Grapefruit Juice for Mfg., effective September 12, 1983 ([PDF](#))
- Grapefruit & Orange for Salad, effective January 11, 1984 ([PDF](#))
- Grapefruit Juice & Orange Juice (Blend), effective November 1, 1972 ([PDF](#))
- Grape Juice, effective May 14, 1951 ([PDF](#))
- Grapes, effective May 12, 1976 ([PDF](#))
- Lemon Juice, effective December 8, 1962 ([PDF](#))
- Lemon Juice, Conc. for Mfg., effective August 1, 1959 ([PDF](#))

Con el tiempo se inició el proceso de convergencia de normas a nivel internacional

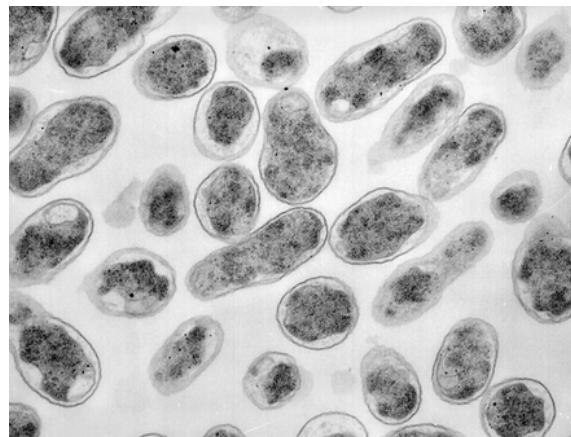
- Al firmar el Acuerdo General (GATT) y luego el Acuerdo sobre la Agricultura (AoA), los países miembros de la OMC aceptaron ciertos principios básicos y pautas que regulan comercio internacional (“rules-based trading”)
- El Acuerdo SPS define las normas sanitarias y fitosanitarias, haciendo referencia a las recomendaciones de los tres cuerpos (“3 Hermanas”) que fijan los estandares globales: Codex Alimentarius, Consorcio Internacional para la Protección Vegetal (IPPC), Oficina Internacional para los Epizoóticos (OIE)
- Tradicionalmente la fijación y el seguimiento de estas normas ha sido responsabilidad del gobierno principalmente, con la ayuda de entidades internacionales

A medida que el comercio agroalimentario creció, el tema SPS se volvió más importante



“Aquellas medidas que afectan a la vida o a la salud de las plantas...

A medida que el comercio agroalimentario creció, el tema SPS se volvió más importante



“...de los animales...

A medida que el comercio agroalimentario creció, el tema SPS se volvió más importante



“...o del ser humano

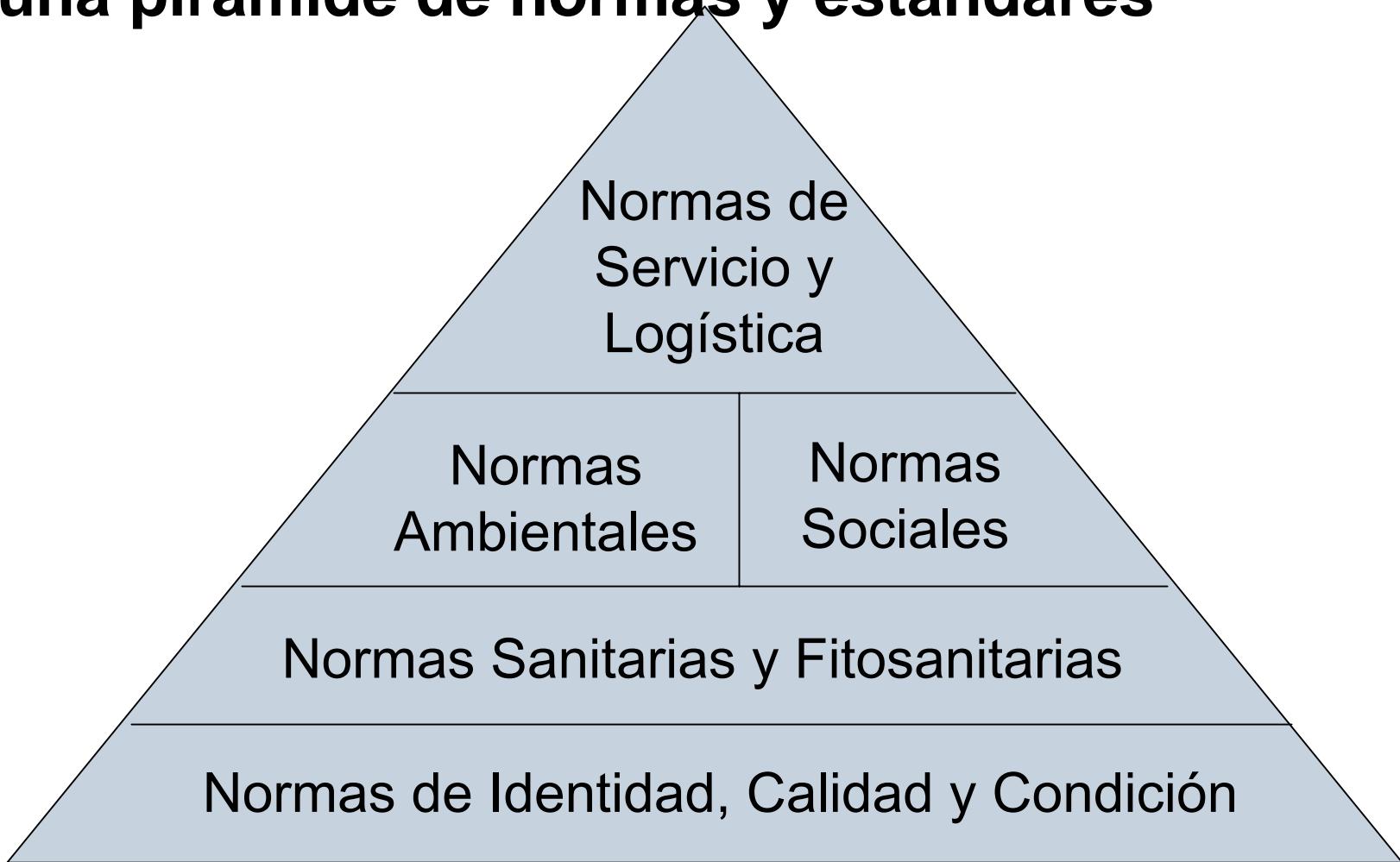
- Los 10 patógenos en alimentos más temidos

- ✖ *Campylobacter*
- ✖ *Clostridium botulinum*
- ✖ *E. coli* 0157:H7
- ✖ *Listeria monocytogenes*
- ✖ *Norovirus*
- ✖ *Salmonella*
- ✖ *Staphylococcus aureus*
- ✖ *Shigella*
- ✖ *Toxoplasma gondii*
- ✖ *Vibrio vulnificus*

La OMC está buscando la mejor forma de mejorar la capacidad SPS de los miembros

- Proyecto Piloto #1: Plan de Acción a Nivel Nacional
 - Uganda
 - Perú
- Proyecto Piloto #2: Arreglos Modelos para la Participación de los Interesados en las Medidas SPS
 - Sri Lanka
 - Paraguay

Pero la verdad es que ahora los productores, exportadores y países tienen que enfrentar toda una pirámide de normas y estandares



Dentro de esto, las normas privadas han cogido mucho más fuerza en la última década

- Con el avance de la globalización el mundo de comercio agroalimentario se ha tornado más complicado
- Por las razones antes expuestas, en ciertas situaciones los requisitos privados ahora son hasta más determinantes que las normas públicas
- Las normas privadas cubren no solamente el producto en sí, sino también los procesos utilizados, las condiciones que giren alrededor de la actividad económica, y el servicio dado antes y después de la entrega de la mercancía
- El costo de no cumplir con las normas privadas es sumamente alto: al inicio, no ser aceptado como suplidor; después, no tan sólo la pérdida de cajas, tarimas, o contenedores que hayan sido rechazados, sino la pérdida del cliente mismo

Hay que respetar no solamente las normas privadas en cuanto a calidad y condición...



..pero tambien sus requisitos de inocuidad..



October 1, 2000

Dear Supplier,

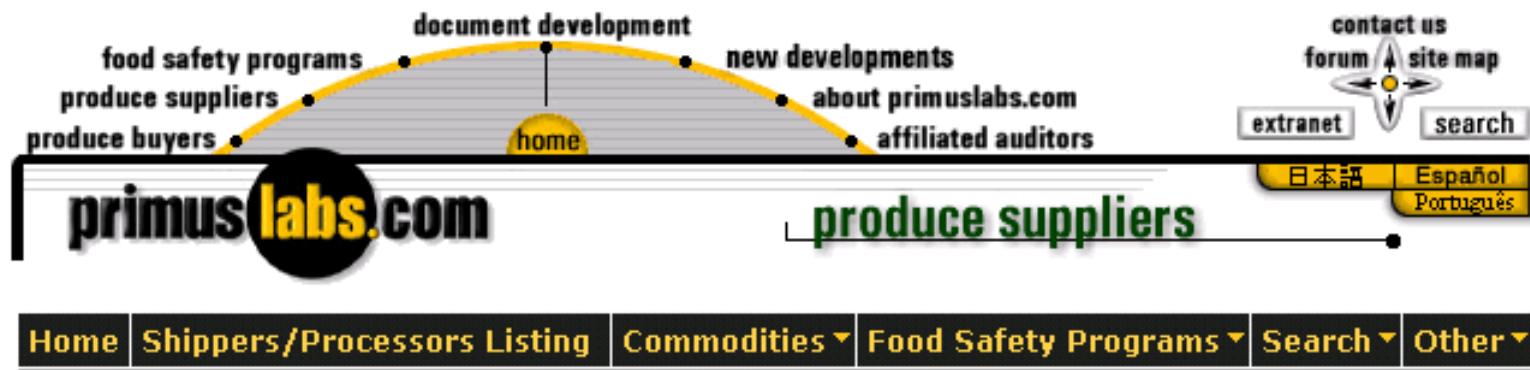
Introduction

The concern with food safety and hygiene in the fresh produce industry, as well as with consumers, has prompted Pick 'n Pay to become one of the first South African retailers who will be assuring its customers that our growers/suppliers have taken measures to develop guidelines and procedures to help minimise food safety risks associated with food handling. We are also more rigorously addressing the ever-present issue of having consistent quality fresh produce available - according to the preset product specifications and standards.

In response to these changing dynamics, Pick 'n Pay is expanding its Produce Buying Safety Program. With the help of produce growing and handling professionals, we are initiating a scientifically based audit program. As a condition of doing business with Pick 'n Pay, growers/suppliers of fresh produce will be required to participate in a verifiable, Independent Third Party Food Safety Audit. The program will initially focus on produce, which has been identified as a high risk for potential contamination. Once the Produce Safety Program is in place, we will purchase produce only from growers/suppliers meeting the objective standards necessary to be certified under the program.

Certification and Audit Parameters

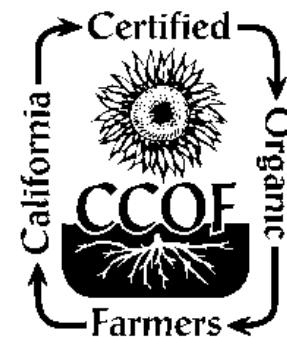
...muchas veces avalados por terceros que se dedican a la capacitación, certificación, auditoría



Al mismo tiempo, las normas privadas ambientales están ganando mayor fuerza...



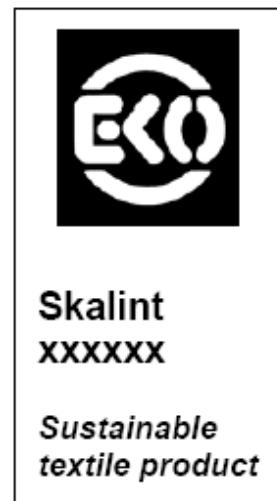
Conservation Beef



...y las normas sociales privadas piden tanto que resultan nuevos nichos de mercado



Promoting the interests of
workers, communities and the
environment in world trade



Hay empresas que tienen su propio código de conducta social...

UK social Code of Conduct for consumer goods: Sainsbury's

1. History

Sainsbury's started the development of a code of conduct in March 1995. The code was released in March 1998. During this time, initial pilot studies were carried out with the Fairtrade foundation. There were a number of reasons for introducing a code of conduct:

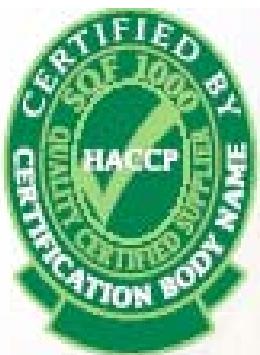
- Recognition of their social responsibility to improve employment conditions.
- A way to address the concerns about "ethical accountability" raised by interested parties such as consumers, NGOs and staff.
- Enabling Sainsbury's to set out the principles by which they want to underpin their trading relationships with their Own Label suppliers. These principles will enable Sainsbury's to work with suppliers who share the same values and who are committed to being socially responsible.
- By developing a code, a tool was created through which the performance of their suppliers can be monitored as well as their own performance, in terms of social responsibility.

J Sainsbury plc

2. Contents

Sainsbury's wants their customers to be confident that when they purchase Sainsbury's own brand products, they are buying goods that are not produced at the expense of people working in developing countries who may be working in unsafe conditions and for poor wages. The code of practice is drawn up along the lines of the relevant ILO conventions and recommendations. The code focuses on:

...hay códigos muy especializados...



For Primary
Producers



For Food
Manufacturers

BRITISH RETAIL CONSORTIUM



For Packing Houses

..aun hay esquemas globales que tratan de cubrir todo tipo de norma a la vez



EUREPGAP®

Desafío #2: Enfrentar la realidad creada por la consolidación mundial en el sector

- 6 empresas manejan el 75% de las ventas de plaguicidas
- 2 empresas producen y comercializan la mitad del volumen global de bananos
- 5 empresas controlan el 75% del comercio en granos
- 30 empresas producen un tercio de los alimentos procesados
- 3 empresas tostadoras procesan el 45 % del café grano y 4 empresas comercializan el 40% del café oro
- 6 empresas chocolateras controlan el 50% de las ventas globales

El proceso de consolidación al nivel de ventas al consumidor sigue también

- Se proyecta que las ventas (de tipo supermercado) de Wal-Mart, US\$82 mil millones hoy en día, ascenderán a \$162 mil millones en 2007, equivalentes al 35% de las ventas de supermercado en EEUU
- En el Reino Unido, 9 empresas controlan el mercado de alimentos; 4 controlan más de la mitad de las ventas a nivel de supermercado
- 5 supermercados controlan el 90% del mercado Francés; 82% del Bélgico, 64% del mercado Holandés, 60% del Alemán
- A nivel global, 30 cadenas detallistas lograron \$1 trillion de ingresos brutos en 2001, o sea el 10% de los alimentos vendidos en el mundo; 10 captaron el 57% de la totalidad de ventas de alimentos

Efectos de la consolidación

- Mayor concentración entre las empresas grandes las conduce a:
 - Una racionalización de sus propias operaciones post-fusión
 - Mayor atención a la innovación tecnológica, especialmente en el uso de la informática y en los sistemas de distribución
 - Búsqueda de mayor eficiencia en sus cadenas de logística, que incluye la eliminación de todo actor que no agregue valor
 - Creación y adopción del concepto de cadenas de valor
 - Selección de suplidores preferidos capaces y dispuestos a invertir, innovar, tomar riesgos, y aceptar precios más bajos a cambio de mayor volumen
- La creciente dominación de las grandes empresas tiene un efecto que se siente a lo largo de cada cadena de valor--los actores a determinado nivel dan preferencia a los suplidores más capaces (usualmente los más grandes) en el nivel inferior, et cetera

Desafío #3: Ganar y consolidar posición dentro de las importantes cadenas de valor

- Tres elementos básicos: **producto, punto de origin, mercado**
- Otros variantes: **forma, presentación, método de transporte, clientela, recibidor específico**
- Puede extenderse desde el campo hasta el consumidor (o sea, “*farm to fork*”)
- Involucra todo el conjunto de actividades y actores requeridos para crear un producto, manejarlo, venderlo, y luego entregarlo a su destino final
- Por “crear y entregar” se entiende producción, manufactura, manejo físico y distribución del producto
- No todas las cadenas tienen un solo punto de origin

¿Cuáles son las diferencias entre una cadena de valor y una cadena logística?

- La cadena de valor se preocupa por lo que el mercado pagará para un producto determinado

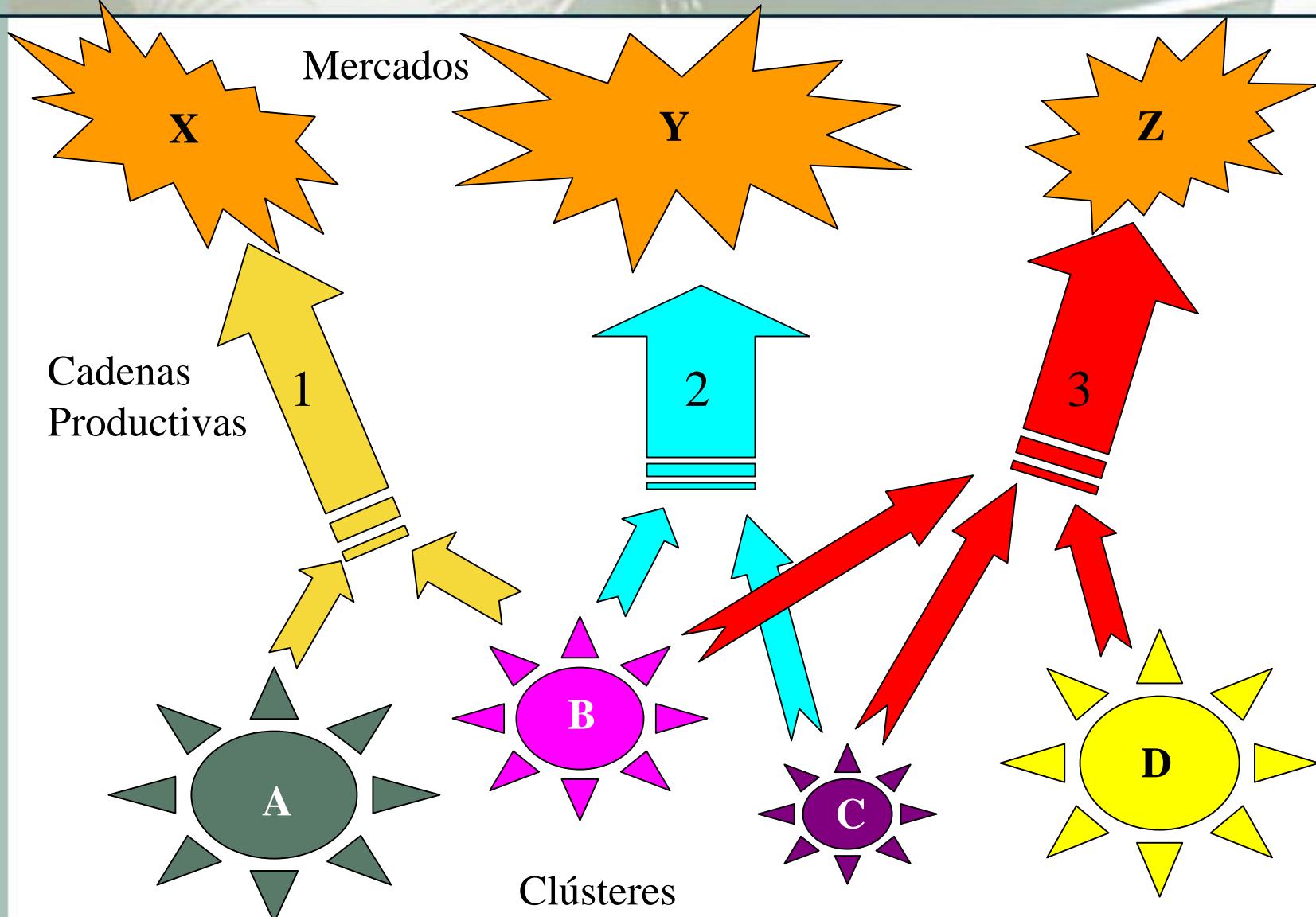
→ En la gestión de las cadenas de valor, lo que se busca es maximizar la participación en el mercado (“market share”) y/o las ventas brutas a través del tiempo
- El concepto de cadenas logísticas tiene más que ver con los costos incurridos en la producción, el manejo físico y la distribución de un producto determinado

→ En la gestión de las cadenas logísticas, se busca reducir el número de actores y todo tipo de fricción que pudiera elevar los costos de transacción y/o generar demoras

¿En que sentido es nueva y diferente esta situación?

1. Pocos actores controlan más volumen, eliminando progresivamente a los intermediarios que no agreguen valor
2. Las partes tienen una visión compartida, hacia el largo plazo
3. Arreglo más estable entre dos ó más compañías, no basada como antes en la relación personal entre vendedor y agente de compras
4. Existe responsabilidad moral y financiera conjunta
5. Las partes buscan rentabilidad y crecimiento de la categoría como tal, evaluando resultados a fin del año, no cada día o cada semana
6. El uso de tecnología de informática es clave, porque se trata de una empresa extendida en todo sentido
7. Personal compartido y/o instalaciones dedicadas

Desafío #4: Conectar los clústeres de producción a las cadenas más promisorias



Clústeres en el desarrollo económico

→ Un conjunto de empresas que operan en la misma industria, muchas veces desde la misma área de producción y con deseos de suplir las mismas cadenas



Flores de corte

Vainilla



Cereales

¿Porqué son importantes los “clusteres”?

- Ofrecen mayor eficiencia (mejor utilizacion de capacidad instalada, temporada más prolongada, costo de compra de insumos más bajo, menos necesidad de mantener un “stock” de insumos o repuestos, más disponibilidad y menor costo de transporte, et cétera)
- Generan externalidades positivas (desarrollo tecnológico, más personal capacitado, mayor disponibilidad y variedad de insumos, mayor atracción para los compradores, más apoyo político, et cétera)
- Permiten una capacidad de respuesta más rápida, flexible y amplia

Fortalezas que el pequeño agricultor ofrece al cluster

- + Vocación agrícola
- + Condiciones agroecológicas aptas para algunos cultivos
- + Temporada extendida en las áreas tropicales y subtropicales
- + Jornal bajo, y luego de capacitación, bajo costo de la mano de obra
- + En algunos casos, más bajo costo de producción
- + Falta de opciones, que conduce a alta motivación
- + A veces, una tradición de trabajos comunales
- + Cercanía a los mercados que crecerán más en el futuro



Debilidades del pequeño agricultor

- Escasez de capital y falta de garantía para prestar dinero
- Poco acceso a la tecnología
- Dificultad en accesar las mejores tierras
- Tendencia de degradar el medio ambiente (suelos y agua)
- Dificultad en controlar las plagas y enfermedades
- Insumos no disponibles o llegan tarde
- Energia escasa y cara
- Tiempo, distancia, costo al mercado
- Infraestructura y servicio de transporte no adecuado
- Pequeña escala de la unidad productiva, dificultades en entregar los volúmenes solicitados
- Analfabeto muchas veces
- Falta de conocimiento del los mercados externos, pocos contactos, nada de ingles
- Poca influencia política

Los pequeños podrán aspirar a participar in las cadenas de valor globales siempre y cuando:

- ✓ Se les trata como agroempresarios como individuos y como grup
- ✓ Se les ayuda comprender los mercados y el mercadeo moderno
- ✓ Hay cadenas de valor que valen la pena desarrollar
- ✓ Se les ayuda eliminar cuellos de botella en las cadenas de logistica
- ✓ Se connectan con “export catalysts” (empresas lideres)
- ✓ Se les ayuda entender y cumplir con las norma oficiales y técnicas de todo tipo
- ✓ Logran generate los volumenes necesarios
- ✓ Reciben ayuda para asimilar las tecnologías requeridas

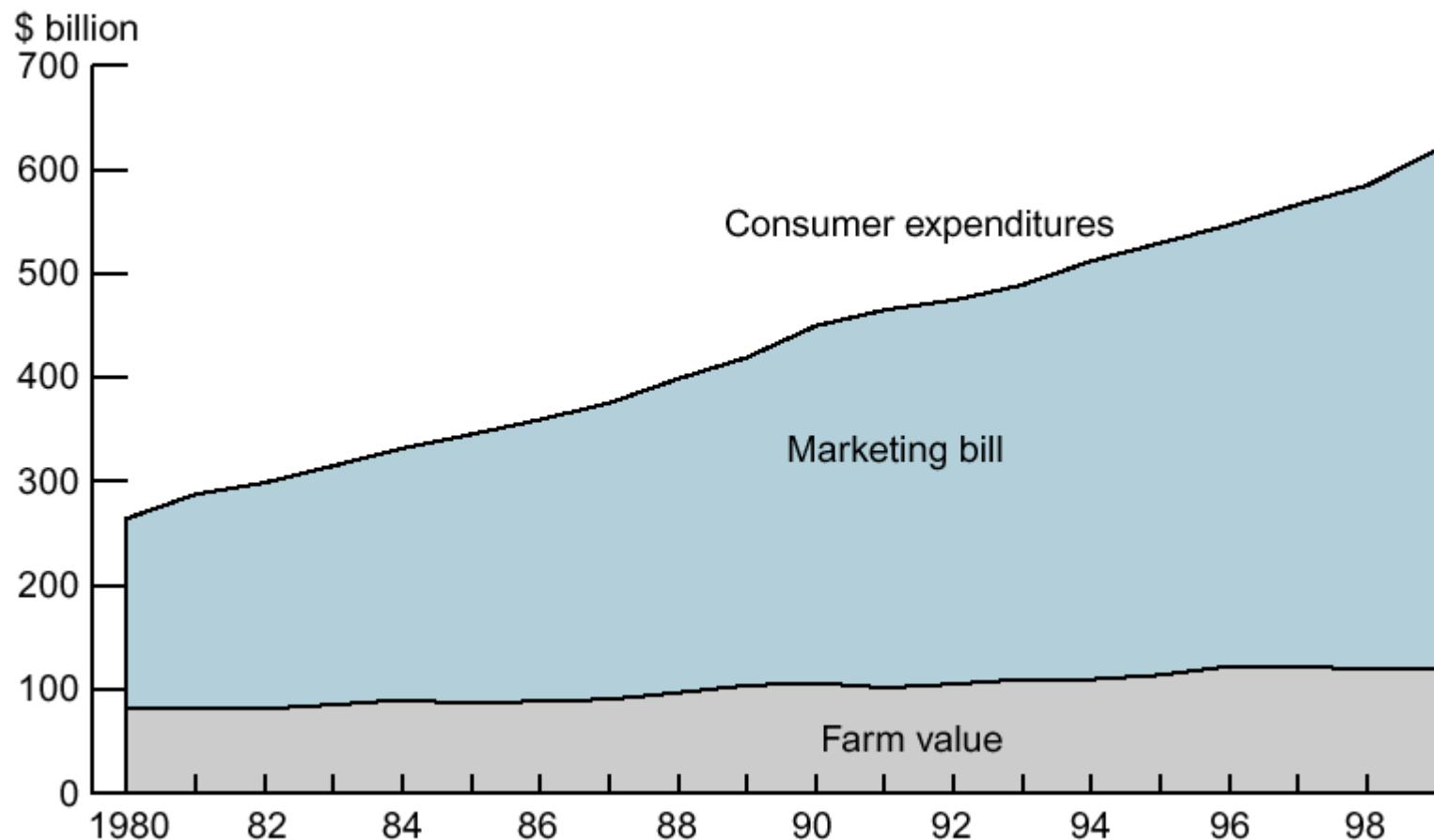
Desafío #5: Cambio en el valor, la composición, y el rumbo del comercio agroalimentario

- Caida de precio en los productos agrícolas primarios
- Cambios en el contenido de la canasta de productos comercializados a nivel internacional
- Evolución de los mercados de destino más promisorios



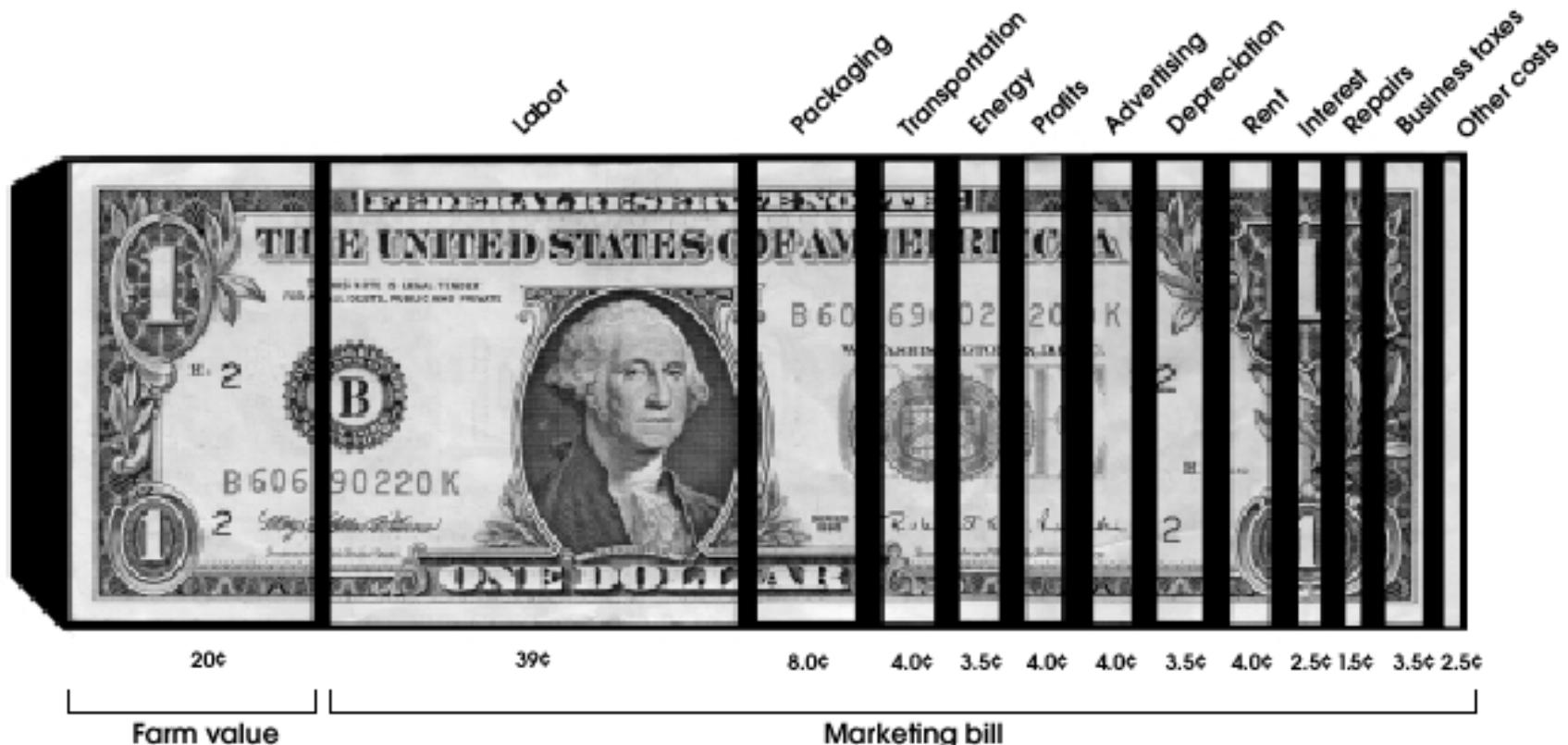
Desafío #6: Subir el valor unitario de las exportaciones y rendirle más al productor

Marketing Costs Rose 45 Percent Between 1990 and 1999



Source: Economic Research Service, USDA, 2000

El porcentaje del precio final absorbido por las actividades de mercadeo tiende a subir



En el banano, solamente el 2% del valor de ventas al consumidor queda en manos del productor; los países de origen reciben el 12%

Fuente: USDA/ERS

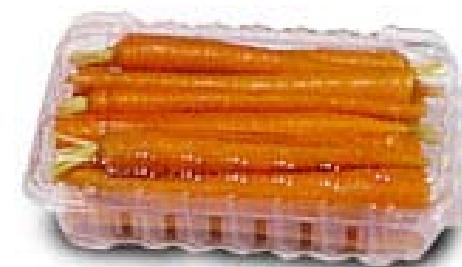
Valor agregado

- Segun los economistas, “valor agregado” significa la diferencia entre el precio de venta y el costo total de utilización de los factores de producción y bienes/servicios intermedios
- En las cadenas agroalimentarias, valor agregado significa un aumento en la rentabilidad (margenes mayores o mejor retorno sobre capital) de la cadena como tal, gracias a alguna acción tomada
- A veces, los participantes en una cadena consideran un alza en el porcentaje de mercado captado como otra forma de valor agregado
- Los diversos actores dentro de la cadena pueden beneficiarse en proporciones distintas, dependiendo de quien hace la inversión y quien controla más la cadena (por ejemplo, “food safety”)

→ El valor agregado se logra mediante innovación

Ejemplos de innovaciones en producto

- Cambiar el producto o la variedad
- Cambiar la forma o la presentación
- Diferenciarse con una nueva marca
- Extender la gama de productos ofrecidos
- Cambiar el producto genéticamente
- Introducir un nuevo empaque o contenedor
- Añadir información (origin, recetas, cualidades)



Ejemplos de innovaciones en proceso

- Convertir la producción al sistema orgánico
- Introducir Buenas Prácticas Agrícolas (GAP)
- Eliminar el uso de químicos nocivos
- Implementar un nuevo sistema de control de calidad
- Introducir un sistema de trazabilidad
- Lograr certificación ética (“Fair Trade”)
- Implementar un Plan HACCP



Reseña de los desafíos

- #1: Manejo apropiado de las normas
- #2: Enfrentar la realidad creada por la consolidación mundial
- #3: Ganar y consolidar posición dentro de las importantes cadenas
- #4: Conectar los clústeres de producción a las cadenas más promisorias
- #5: Cambios en el valor, la composición, y el rumbo del comercio agroalimentario
- #6: Subir el valor unitario de las exportaciones y rendirle más al productor

Tareas

1. Mejorar la productividad, especialmente en los productos primarios
2. Reducir fricción en las cadenas logísticas
3. Aumentar competitividad a nivel de producto, empresa productor/exportador, cluster y/o país
4. Agregar valor dentro de las cadenas
5. Lograr mayor capacidad de manejar las normas
6. Ampliar la participación de pequeños productores

Opción #1: Eliminar barreras sanitarias o fitosanitarias que no se justifican

- Negociar directamente con las autoridades SPS del mercado de destino
- Seguir el proceso de Análisis de Riesgos especificado en los acuerdos IPPC o OIE
- Desarrollar métodos de amortiguar los riesgos (enfoque sistemas, tratamiento cuarentenario, zona libre)
- Presentar queja ante la OMC

Opcion #2: Buscar ventanas estacionales

- Brazil Deal: Tommy Atkins from 8/20 to 11/10, air then sea
 - \$12.00-\$5.00/10 lb. box
 - Ecuadorian Deal: Tommy's and Hadens from 11/15 to 1/30, all by sea
 - \$5.50-\$3.25
 - Peruvian Deal: Hadens from 12/15 to 1/31, Kents from 12/25 to 3/1, all sea
 - \$3.75-\$6.50
 - Chiapas Deal: Ataulfos 3/1 to 5/30, by land
 - \$8.00-\$4.00
 - Oaxaca Deal: Haden's, Tommy's from 2/15 to 4/15, by land
 - \$5.00-\$3.50
 - Michoacan Deal: Hadens from 4/1 to 6/15, by land
 - \$4.00-\$1.60
 - Nayarit Deal: Hadens, Tommy's, Ataulfos from 5/15 to 7/1, by land
 - \$4.50-\$1.50
 - Sinaloa Deal: Hadens, Tommy, Kents and Keitts from 7/15 to 9/10, by land
 - \$2.00-\$3.75
- 
- Haden
- 
- Tommy Atkins
- 
- Ataulfo

Opcion #3: Mejorar la productividad...

- Mejorar el germoplasmo
- Aumenta los rendimientos a nivel de campo, empacadora, procesadora
- Reducir las pérdidas pos-cosecha
- Extender la vida de tránsito/anaquel
- Reducir los rechazos y reclamos



Opcion #4: Hacer inversiones estratégicas

Pre-enfriamiento en el campo ➔



➔ Mécanización

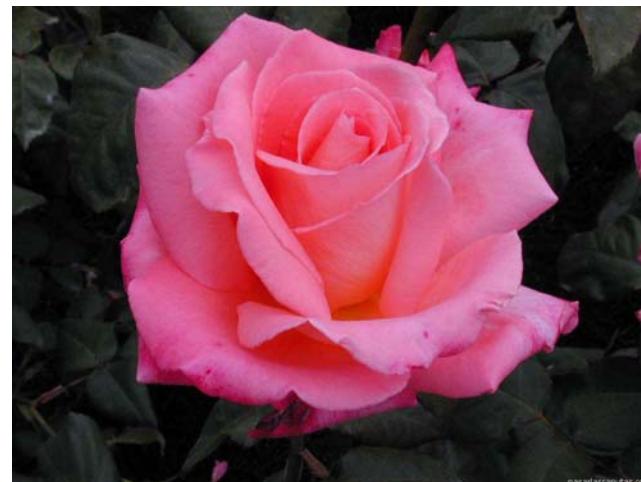
Mejores métodos ➔



Opcion #5: Mejorar la calidad...

Abt

Americana Best



Opcion #6 Mejorar la selección y la clasificación



Selección manual
(cebollas)

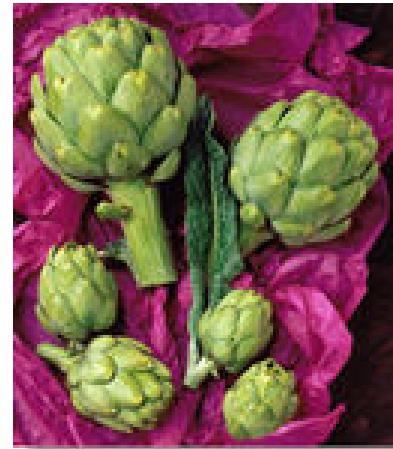
Clasificación
óptica (mangos)



Opcion #7: Diferenciar el producto por sus atributos



Opcion #8: Mejorar la presentación



Opcion #9: Utilizar empaques para el consumidor



Opcion #10: “Extender la linea” cuando se ha tenido exito con cierto producto



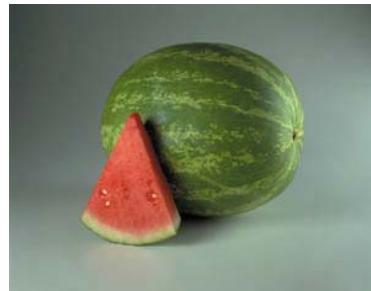
Melon
blanco



Bolas de melón
IQF



Sandia con
semilla



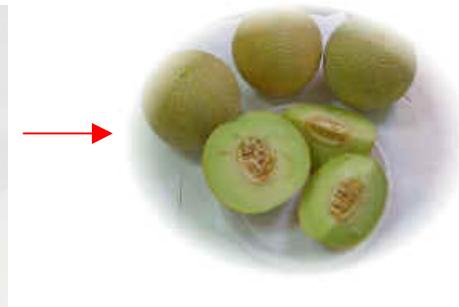
Sandia sin semilla



Cantalup



Charentais

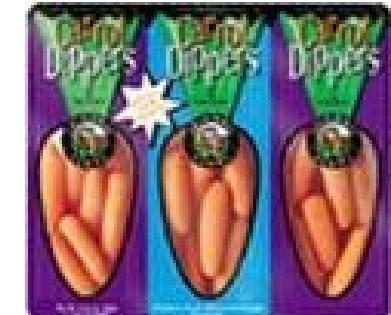
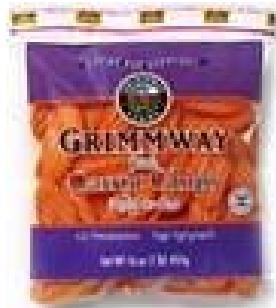
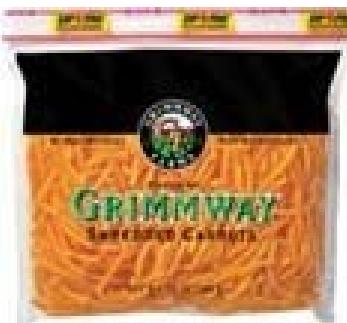
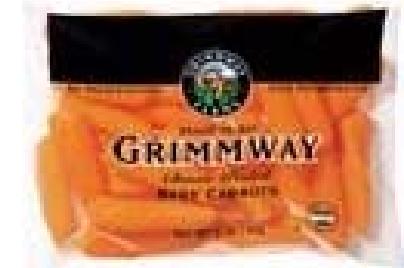
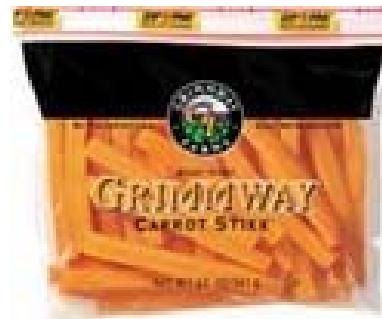
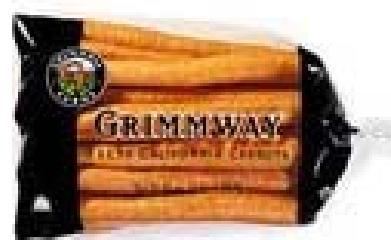


Melon Galia



Melones de
regalo

Opcion #11: Pre-cortar los vegetales, también extendiendo la linea con diversas presentaciones,....

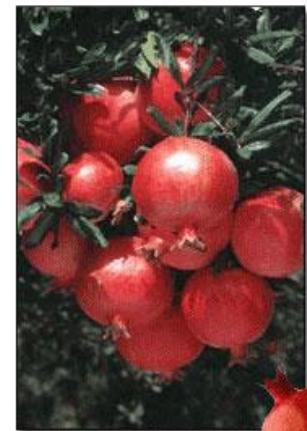


(All images copyrighted by Grimmway farms)

Opcion #12: Congelar el producto,...



Opcion #13: Procesarlo de alguna otra manera



Opcion #14: Desarrollar nuevos productos alimenticios o industriales manufacturados,...



- Sólamente el 1% del maíz producido en EUA se consume directamente en forma fresca, congelada o enlatada
- Lo demás se dedica a toda una gama de usos derivados:
 - Alimentos para ganado y aves
 - Ingrediente
 - Etanol
 - Aceite comestible
 - Almidón
 - Para endulzar

Opcion #15: Diferenciar su producto con una marca (*branding*),....



Pasos generales sugeridos

- Eliminación continua de todo sesgo contra la exportación
- Trabajo permanente a nivel de cada país en la eliminación de las barreras no arancelarias (SPS) en los EUA y dentro de la región
- Re-análisis de las **ventajas comparativas** de Paraguay
- Identificación y evaluación (por las asociaciones u otras entidades involucradas en la promoción de las exportaciones) de las **ventajas competitivas** de la región, seguido por un plan de acción
- Re-priorización de las cadenas de valor más promisorias
- Análisis detallado de los cuellos de botella u otros factores limitantes, que habría que eliminar para abrir y explotar nuevas oportunidades
- Acción conjunta entre gobierno, sector privado, sociedad civil