



**Timber Committee
Economic Commission for Europe**



**European Forestry Commission
Food and Agricultural Organization**

TEAM OF SPECIALISTS ON FOREST PRODUCTS MARKETS AND MARKETING

UNECE/FAO Timber Branch Market-Related Outputs Survey, 2005

Results and Analysis

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Background

The UNECE/FAO Team of Specialists on Forest Products Markets and Marketing conducted a survey of the UNECE/FAO Timber Branch's market-related outputs in March 2005, at the request of the FAO/UNECE Working Party on Forest Economics and Statistics, and in fulfillment of one of its mandate items.

Objectives

1. Evaluate all market-related outputs to enable a sound basis for decision on their content, timing and quality level.
2. Facilitate a Timber Branch stakeholder analysis.
3. Measure selected achievements of the UNECE/FAO Forest Products Marketing Programme.

Methodology

The Team drafted the survey to include all market-related outputs, including publications, UNECE Timber Committee Market Discussions, and the Timber Committee/European Forestry Commission Website. Preceded by a pre-notification message, the survey was sent by e-mail to the Timber Branch's entire contact database (approximately 1300 e-mail addresses), followed by a reminder notice. Instructions allowed respondents to find more information via web links and respondents could skip questions for unfamiliar outputs.

The results were tabulated and analyzed in the report below. The "interpretation of results and comments" are the Team's interpretations of both the survey results, and the respondents' comments. The Team's comments are included. Recommendations from the Team are included for each output.

The response rate was high, at 10% of the population. All stakeholder groups were successfully represented: family, partners, policy heads, supervisors, beneficiaries and contributors, commentators and opinion makers and "outsiders" (see survey in annex 2 for definition of stakeholder groups). A second objective of the survey was to collect information for a stakeholder analysis, however it is not included in this report, and will be completed separately.

Summary and conclusions on content, quality and periodicity by type of output

(numbering corresponds to survey)

III. Publications

1. The main market-related publication is the UNECE/FAO *Timber Bulletin* “Forest Products Annual Market Review”. 99% of respondents rated its content and quality as satisfactory or above, with nearly 60% rating it excellent. Nearly 90% said it should be produced annually, as now.

Interpretation of results and comments. The Review is vital according to respondents who rated highly its content, quality and annual periodicity. Respondents acknowledged time and budget constraints in its production.

Recommendations of the Team:

- 1. Maintain current content and quality level*
- 2. Continue to produce annually*

2. Another publication, which was formerly annual until the last edition is the UNECE/FAO *Geneva Timber and Forest Discussion Paper* “Status of Forest Certification in the UNECE Region”. 98% rated its content and quality as satisfactory or above. 60% said it should be again produced annually.

Interpretation of results and comments. The Certification Updates received high ratings. Most respondents indicated the need to have this update published annually or even more often. The Certification Update for 2003 was out-of-date when it was published in 2005. They cited the status updates as an objective source of balanced information from an independent source. A suggestion was made to include more information from certification schemes and the forest industry.

Recommendations of the Team:

- 1. Maintain current content and quality level*
- 2. Re-institute as annual publication*

3. Country market profiles are published periodically in the *Geneva Timber and Forest Discussion Paper* series and were previously included as special chapters in the “Forest Products Annual Market Review”. 97% responded that the profiles are satisfactory or better in quality and content. However 5% stated they should be discontinued. 60% recommended periodic publication and another 40% annually.

Interpretation of results and comments. The majority of respondents cited the country market profiles as helpful and authoritative. They requested their standardization and regular production.

Recommendations of the Team:

- 1. Standardize and produce regularly.*
- 2. Profiles could be better organized on the TC/EFC website, e.g. indicating which profiles have been done and when, and which profiles are underway and planned.*
- 3. Update country fact sheets on the TC/EFC website and hardcopy*

IV. Timber Committee Market Discussions

4. Discussions in session between experts and delegates

94% rated the content and quality as satisfactory or better and 83% said they should be annual.

Interpretation of results and comments. All respondents appreciate the annual Market Discussions—no one said discontinue. They provide information for policy setting. They are the only international forum to discuss broad international forest products market developments. Based on formal statistical information, the Discussions make the important bridge to the current market situation and forecasts for the next year. Respondents want continued focus on topical issues, which has been a strong point of the Discussions. The quality of the discussions varies.

Recommendations of the Team:

- 1. Continue the annual TC Market Discussions*
- 2. Maintain the high quality*
- 3. More industry involvement needed.*

5. Exchange of market related policy issues during the discussions

All rated the content and quality as satisfactory (61%) or excellent (39%).

Interpretation of results and comments. All responses were positive. A suggestion is to include more discussion between CIS and central and eastern European countries, especially those in transition to market economies. The TC Market Discussions are a key forum for all countries in the UNECE region to discuss policy and market issues, which are proving to be increasingly important in a free market.

Recommendations of the Team:

- 1. Continue annually.*

6. Expert presentations

59% rated the content and quality as excellent, 40% as satisfactory. 67% said they should be annual, with 33% replying periodic.

Interpretation of results and comments. The experts' presentations are valued highly. Improvements could be made to the website, for example to allow a selection by subject, rather than chronological. One respondent wanted written reports, however since speakers are not paid, this could be difficult.

Recommendations of the Team:

- 1. Maintain the annual expert presentations at their current high quality level*
- 2. Speakers should cite sources, including dates, of information in their presentations, especially since the PowerPoint slides remain on the TC/EFC website for years.*
- 3. Consider improving the website to allow selection of presentation by subject, rather than simply a chronological listing.*

7. TC annual market forecasts

94% rated the content and quality as satisfactory or better. 6% rated as below satisfactory. 83% said they should be annual.

Interpretation of results and comments. While the majority were satisfied with the forecasts as a basis for the TC Market Discussions. However, 6% rated the forecasts as below satisfactory, criticizing the lack of standardization of forecasting methods and subjectivity of forecasting. One respondent stated that producing country's forecasts were valuable in building an industry-government dialogue.

Recommendations of the Team:

- 1. The Team believes that forecasting needs to be reviewed and improved.*

8. TC annual market statements

47% rated the content and quality as excellent, and 51% as satisfactory. 85% said they should be annual.

Interpretation of results and comments. This outcome of the TC Market Discussions is the basis of a press release and formerly the body of the Timber Bulletin. Respondents supported the Committee's statement without comment.

Recommendations of the Team:

- 1. The Team feels that this statement is important by being the most up-to-date market-related output. Maintain the annual market statement at its high quality level.*

9. Country market statements

41% rated the content and quality as excellent and 49% as satisfactory. 10% rated the content and quality as below satisfactory, the largest by far for any output. 85% said they should be annual.

Interpretation of results and comments. The largest rating of unsatisfactory of any output, but all want the country statements to continue. Criticisms were on their standardization, despite secretariat attempts to provide guidance for the statements in advance. Country reports have great potential, and are a "tremendous resource" for both the industry trade, and governments.

Recommendations of the Team:

- 1. Significant improvement is needed with a goal of consistency*
- 2. Improve the number of countries responding (21 of 55 in 2004).*

V. Website

10. TIMBER database of forest products consumption, production and trade

54% rated the content and quality as excellent and 39% as satisfactory. 7% rated the content and quality as below satisfactory. 74% suggested an annual update, with 25% a periodic update.

73% stated TIMBER is easy to find, download and use. 25% stated difficulty in finding specific statistics. Only 2% stated TIMBER statistics are impossible to find.

Interpretation of results and comments. While it seems that most respondents are satisfied, indeed many people, 25%, indicated difficulty in accessing data. Given the antidotal evidence based on comments, it seems that the respondents might not have understood the question referred only to the TIMBER database of statistics. For example, maybe they responded to the TC/EFC website in general, and not the TIMBER database.

Recommendations of the Team:

The Team feels that the TIMBER database is a strong foundation of the work of the TC and secretariat, but that it is seriously underutilized by clients, mainly due to difficulty in accessing individual statistics, and that potential users do not know it.

- 1. Make the database selectable for individual statistics.*
- 2. Conduct adequate, regular publicity.*

11. TC Market Discussions, reports, presentations and press release

100% stated the content and quality as satisfactory or better, with 44% as excellent. 61% were for annual updates, 39% for periodic.

Interpretation of results and comments. Respondents supported this website, but noted that better organization of the website would be helpful for the expert presentations. One respondent indicated that Timber Bulletin #6 on "Forest Products Market Prospects" was no longer available.

Recommendations of the Team:

1. *Maintain the website and keep it up to date.*
2. *Inform clients when updates occurred. A “webminder” would have public relations benefits for the market-related outputs.*
3. *The TC/EFC website search mechanism was mentioned as necessary to find information. Fix the search mechanism which has not been working for months.*
4. *More reports from CIS and central and eastern European countries are desired, as this is truly one of the potential strong points of the TC and EFC.*

12. Certification website

71% responded the content and quality are satisfactory, 21% excellent and 7% below satisfactory. 56% wanted to continue the site annually, and 40% periodically. 4% said it should be discontinued.

Interpretation of results and comments. 4% called for discontinuation. However, perhaps it is a question of timing. Along with question 2, the late appearance in early 2005 of the Certification Update 2003 resulted in negative ratings of this site. The site has a low profile, but has more potential. The site is designed to be extremely simple, and is intended to facilitate updating within secretariat resources. As in the other websites, an annual update is not often enough, at least for 40% who want more frequent updating.

Recommendations of the Team:

The TC and EFC are impartial in certification, indeed the only non-stakeholder, which is a great advantage to researchers and governments.

1. *Maintain the site on the TC/EFC website*

Results of the survey in light of the 3 objectives

1. Evaluate all market-related outputs to enable a sound basis for decision on their content, timing and quality level.

The survey achieved this objective.

2. Facilitate a Timber Branch stakeholder analysis.

The stakeholder analysis is incomplete, and was not intended as part of the report for the WPFES. We do have an analysis of respondents by function and the survey had a wide spread of respondents which appears to have included all stakeholder groups. The Team will analyse stakeholders more, especially with regards to the private versus public mix, and attempt to identify any groups that did not respond.

3. Measure selected achievements of the UNECE/FAO Forest Products Marketing Programme.

The respondents indicate that the Forest Products Marketing Programmes current outputs are regarded excellent and satisfactory for most users. The survey has provided useful feedback and additional specific suggestions for consideration by the Team in its future work.

Annex 1. Summary of responses (120 responses)

III. Publications

1. Forest Products Annual Market Review

Rating content and quality:

Excellent	58%
Satisfactory for my needs	41%
Below satisfactory	1%

Please explain improvement needed:

1. Generally very good analysis and discussion by FAO, but whole thing is undermined by inaccurate and often misleading wood trade statistics. This is no fault of FAO, but reflects fragmentation of international industry and deeper failings of customs.
2. Mais il serait intéressant d'avoir les prévisions un peu avant. Je consulte votre site en permanence afin d'avoir information actualisé.
3. Not really, but better than satisfactory. There are myriads of improvements but i am sure you have time and budget constraints

How often should this be produced?

Continue annually	89%
Continue periodically whenever needed	10%
Discontinue. <i>Please explain:</i>	1%

1. Half-yearly
2. The publication is excellent already now, but in future the contents probably could be still enlarged a bit, so that connections, relations and comparisons of forest sector with respect to other sectors to economies could be made at some extent.

Additional comments?

1. An annual report is good, but it must appear soon after the year that is being reviewed and the data must be accurate
2. Not all of it is of relevance for us, but I always find good information that I am regularly using.
3. The timetable is quite astonishing (19 Aug on the Website). Excellent achievement by the Timber Branch, but remember Eurostat's role also (JFSQ data collection, validation etc.). Good substance improvements (policy-orientation, shorter chapters, etc).
4. UNECE/FAO Timber Branch must inform in Spanish too, not only in English or French, because the press releases or other different documents are often in English in your web

2. Status of Forest Certification in the UNECE Region, a previously annual UNECE/FAO Geneva Timber and Forest Discussion Paper.

Rating content and quality:

Excellent	26%
Satisfactory for my needs	72%
Below satisfactory	2%

Please explain improvement needed:

1. German version
2. This harsh judgment only reflects the fact that I monitor certification events regularly myself, so as far as I'm concerned all the information is way out of date by the time I receive it! I have no problem with quality of the report and analysis

How often should this be produced?

Continue annually	60%
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Continue periodically whenever needed 38%

Discontinue. *Please explain:* 2%

1. Sujet important, mais qui me concerne un peu moins étant donné que ce qui m'intéresse essentiellement est le comportement du marché mondial. Néanmoins je tiens compte et je regarde cette information tous les ans.

Additional comments?

1. A very much market oriented issues. Therefore input or comments from forest industries & other involved institutions would be more appropriate.
2. Annual my no longer be necessary as there is more information on the various certification schemes being published by others. The UNECE does provide a nicely balanced and complete view which is needed; and difficult to achieve.
3. Country statistics by certification system could be added, also illustrated whenever possible by forest ownership categories
4. Current problem in accessing 2003 report from this webpage
5. Include statements on the reports by the main certification schemes. The link with the last report seems not to be active
6. Last descriptions actually available for 2003. These information are no longer relevant
7. More regular issues would be even better, as the statistics are still changing very rapidly. The focus on Chain of Custody needs to be strengthen as it addresses both SFM but is also seen as a solution to illegal logging.
8. Problems with quality from time to time. One more aspect for continuation: A workshop will be arranged on forest certification in September. This is not the time to discontinue.
9. This is an increasingly important document and a valuable tool for the wood products industry in addressing the frequent hyperbole and misinformation of ENGOs.

3. Country market profiles. Periodically we highlight a specific country's forest products markets (formerly in a special chapter of the Forest Products Annual Market Review) or in a Geneva Timber and Forest Discussion Paper.

Rating content and quality:

Excellent 45%

Satisfactory for my needs 52%

Below satisfactory 3%

Please explain improvement needed:

1. I have taken note of these publications, but for some reasons not "remembered" them when I would have needed them. They should be a good reference for a country, though. Promise to use them more.
2. I've found these very helpful in the past. By concentrating on one country, I get the impression more time can be taken to assess quality of stats, which I sense are more reliable
3. Je me renseigne surtout sur les principaux pays producteurs
4. German version. 2 reports each year. More reports from countries outside of Europe. Where can I find reports of the past? Where can I find a preview of intended reports?

How often should this be produced?

Continue annually	39%
Continue periodically whenever needed	60%
Discontinue. <i>Please explain:</i>	5%

1. 2 reports each year
2. The quality of these reports changes and e.g. the report for Russia was excellent, and much better than the report in the above address. It might be good to try to standardize the reports, so that certain basic info is presented for all countries.

Additional comments?

1. Continue periodically, possibly covering several countries in one issue to receive satisfactory coverage of countries during not very long period.
2. Regularly updated web pages (as on FAO website) may be more useful for country profiles, but occasionally produced reports may be seen as more authoritative.
3. Sometimes these papers are very different in content and layout from each other. It would be very useful to have exactly the same format provided each time (where possible)
4. The forest products annual market review provides an invaluable review of current market trends. I particularly value the recent additions to the report on such topics as policy drivers, certification, secondary processed wood products, country reports of
5. This information is very much welcomed by some of my members (in Particular Portugal, Spain, Italy)
6. Until such time as we can trust the international assessments, do more of these.

IV. TC Market Discussions

4. Discussions in session between experts and delegates

Rating content and quality:

Excellent	41%
Satisfactory for my needs	53%
Below satisfactory	5%

How often should this be produced?

Continue annually	83%
Continue periodically whenever needed	17%
Discontinue. <i>Please explain:</i>	0%

Additional comments?

1. Although I do not attend the meetings the papers presented at the meetings and posted on the web site are often very useful. See Q6 below to which this comment is more appropriate
2. Annual discussions should be continuous. Besides, special discussion can be held after extraordinary events which have strong impact on forest product market, like 1999's windblow damage
3. Back to the same theme, should be discussion of the quality of the data as much as of the markets. However, the anecdotal information obtained during market discussions is very useful.
4. Discussion is of varying quality. Presentations are usually really excellent and very valuable
5. Dynamism in the discussion is sometimes lacking. Maybe a moderator bringing the discussion to sensitive issues with a real panel of experts would be a way to raise interest within the audience.
6. Engage experts from developing countries (e.g. Georgia).
7. Market discussions tend to be nice overviews, well-presented and informative, there is some lack of real discussion (perhaps connected to the profile of country representatives - not many representatives from industry)
8. More often we use unece discussion papers as background information for policy setting situations. The depth of the papers is of key importance to us.

9. The only international platform to discuss the broad international forest products markets developments
10. The quality of these sessions are not as high as they should be. Delegates come because they represent their country, but they are not necessarily well prepared. Reports take verbatim what participants say.

5. Exchange of market-related policy issues during the TC Market Discussions

Rating content and quality:

Excellent	39%
Satisfactory for my needs	61%
Below satisfactory	0%

Please explain improvement needed:

1. Engage developing countries in TC Market Discussions.

6. Expert presentations.

Rating content and quality:

Excellent	59%
Satisfactory for my needs	40%
Below satisfactory	1%

Please explain improvement needed:

1. A written text should be added to the slides
2. J'utilise cette information et j'analyse avec beaucoup d'intérêt.

How often should this be produced?

Continue annually	67%
Continue periodically whenever needed	33%
Discontinue. <i>Please explain:</i>	0%

Additional comments?

1. Add the month year of presentation and summary in the index
2. Ad-hoc meeting on selected issues could be added between the Timber Committee sessions in order to dig further in issues.
3. Very useful

7. TC annual market forecasts.

Rating content and quality:

Excellent	44%
Satisfactory for my needs	50%
Below satisfactory	6%

Please explain improvement needed:

1. As before, seems pointless "forecasting" until you get trade data accurate and on time! Also, with the exception log production data, I don't take any notice of trade forecasts issued by government bodies. Public officials not involved in day-to-day trade
2. Could look further forward and be based on simple product indices - pulp, sawn timber, etc.
3. These are mainly projections of current poor information (poor because actual data is not yet available) or personal opinion about the present situation on the future period

How often should this be produced?

Continue annually	83%
continue periodically whenever needed	14%
discontinue. <i>Please explain:</i>	3%

1. Misleading for reasons above
2. Would be nice if econometrics was used as a companion technique for forecasting

Additional comments?

1. Forecasts are usually just a continuation of historical trends. Here more emphasis should be given to new methods of extracting information on future developments, on top or instead of technical equilibrium-based model forecasting.
2. More explanation on underlying factors influencing forecasts would be useful
3. Preparation of annual forecasts provides good structure for national dialogue with forestry industry associations on statistical trends.
4. TC annual market forecasts are in the segment of forecasting unreliable. Other data (previous years) are already collected by JFSQ before we do TC annual market forecasts. Because of that I think that is not rational to do market forecasts every year.
5. The reliability of these forecasts is naturally a problem, but anyway they give some sight of the future. Many countries seem just to inform the same figures for the current and following year.
6. Very important as a base for discussions especially for countries with strong forest and forest industries sector, however some other countries can feel some burden when preparing requested data

8. TC annual market statements.

Rating content and quality:

Excellent	47%
Satisfactory for my needs	51%
Below satisfactory	2%

Please explain improvement needed:

1. German version
2. Only because I have come to seriously doubt the quality of the data
3. Quand je peux le consulter, cela n'a pas ete le cas cette fois-ci.

How often should this be produced?

Continue annually	85%
Continue periodically whenever needed	14%
Discontinue. <i>Please explain:</i>	1%

1. Statements from year 2002 are no longer relevant in dynamic markets.

Additional comments?

1. Rather useful
2. The country reports for the market statement from each country has the same pattern of writing text. New issues are perhaps not included by most countries.

9. Country market statements prepared for annual TC session.

Rating content and quality:

Excellent	41%
Satisfactory for my needs	49%
Below satisfactory	10%

Please explain improvement needed:

1. A more detailed general framework is necessary.
2. Again, the format and content of these statements need to be more universal, as some focus on certification, some on wood markets, etc. It would be more useful if the author were given a format to adhere to
3. Desirable to improve standardisation of statements and to give delegates opportunity to comment on them during TC session.
4. German version. Information from other markets is missing here (e.g. China, Japan)
5. Reporting is very inconsistent and generally poor. Most statements are very thin, particularly on hardwoods, and give the impression of being thrown together at the last minute. Needs more accurate, more comprehensive and more timely log production.
6. Standardization needed
7. Very inconsistent in content and structure.

How often should this be produced?

Continue annually	85%
Continue periodically whenever needed	15%
Discontinue. <i>Please explain:</i>	0%

Additional comments?

1. Countries need to give more attention to completing these in full. Some market statements are excellent while some others do not provide enough detail. All countries should be encouraged to do their best on this important baseline information.
2. Country reports have potential - at present totally unrealised - to be a tremendous resource for the trade and industry
3. Is of varying quality but is often very informative
4. Preparation of annual market statement provides good structure for national dialogue with forestry industry associations on market developments
5. Same as in Q7
6. This an excellent idea to have up-to-date market information on different countries. However, the quality of the reports changes quite much. Could some standardization also in this case (instructions for writers?) help to improve the reports
7. Try to improve the incorporation of the national statements in the policy related discussions
8. Would benefit from having a standard template and consistent reporting for each country - easier said than done!

V. Website

10. TIMBER database of forest products consumption, production and trade.

Rating content and quality:

Excellent	54%
Satisfactory for my needs	39%
Below satisfactory	7%

Please explain improvement needed:

1. Needs clarification of content
2. This is an excellent report and helps me tremendously in getting information on world wood products markets
3. Too complicated to use. Data too inaccurate. Practice of repeating data from previous year when no more recent data is available should be avoided - it is misleading. It is better to record that no recent data is available.

How often should this be produced?

Continue annually	74%
Continue periodically whenever needed	25%
Discontinue. <i>Please explain:</i>	1%

1. Would prefer one authoritative database as source (with indication that it has been reviewed and agreed by NC) - not clear how this DB relates to FAO DB

Ease of Use:

The statistics are easy to find, download and use	73%
I have difficulty finding the specific statistics I need	25%
I find access to TIMBER statistics impossible	2%

Additional comments?

1. Almost daily use. What you should take with you if you were to live on a desert island...
2. Any chance of including stats on secondary processed wood products?
3. I see this database a very good tool to get data, even if much data are missing. I also know that the information is difficult to obtain. So, all that you can collect is very welcome.
4. I would prefer more user-friendly format than this database. Having located the database the statistics are easy enough to find, but not so easy to use, because data columns alternate with symbols, time series would be easier to view as columns.
5. More data needed, and regularly updated
6. Normally we use FAOSTAT for country coverage reasons, but TIMBER Is more reliable (some large-scale anomalies in FAOSTAT). Timber Branch databases are not sufficiently known to users. More marketing is needed.
7. Put for disposal more comparable international data, e.g. wood consumption per head in compliance with improved pan-European indicator for SFM.
8. The flat files are powerful but require some practice.
9. The UNECE Trade timber website has changed quite often over the last years, however, I still find it sub-optimal, as even when I know which products I am looking for & know that they are on the server I have difficulties to find them
10. Use very infrequently
11. Used them 2 years ago, thus my comments are based on that experience. Hard to download, have to know exactly what the different categories are, etc.
12. With the volume of information, such statistics can never be straightforward!

11. Timber Committee (TC) Market Discussions reports, presentations, press release.

Rating content and quality:

Excellent	44%
Satisfactory for my needs	56%
Below satisfactory	0%

Please explain improvement needed:

1. mais tres en retard. Le numero 6 de Timber Bulletin 2004 je ne l'ai pas vu.

How often should this be produced?

Continue annually	61%
Continue periodically whenever needed	39%
Discontinue. <i>Please explain:</i>	0%

Additional comments?

1. Develop push technology with specific email updates a la CNN, NY Times, etc.
2. In this list, the presentations are most useful for me. There is much information and I have again a feeling that some reorganization might make the pages more friendly for visitors to search information. (of course, the "search command" is always available.
3. Present the reports and presentations from developing countries.

12. Certification website.

Rating content and quality:

Excellent	21%
Satisfactory for my needs	71%
Below satisfactory	7%

Please explain improvement needed:

1. Bit behind the times. Not current.
2. More market related information needed. E.g. product volumes, price premiums, market segments
3. Of course in this part of the web you have excellent reports on certification but I think that from time to time depending on the developments you could publish some press releases or information about this developments.
4. Seems to be the same every year.

How often should this be produced?

Continue annually	56%
Continue periodically whenever needed	40%
Discontinue. <i>Please explain:</i>	4%

Additional comments?

1. A little more information on the recent development on the main systems
2. Any more information on quantities of certified timber products being traded would be very useful but i realise that in the absence of such stats being collected by governments this is probably impossible. Is there any chance protocols could be agreed.
3. It gives a good and 'independent' overview.
4. It seems not up to date - e.g. The FPAMA chapter on CFPs is not there
5. More data/information needed, evaluations of both regional standards, coherence of the whole systems, and issues of transparency and stakeholder involvement regionally and internationally.

6. Replies 'continue periodically whenever needed' indicate that it could be even more often than on annual basis, but it is also caused of current and persisting lack of resources
7. This site is very low profile, but that could be effective
8. Who produces the value added?

VI. UNECE/FAO Timber Branch Stakeholder Analysis

13. Which of our informal stakeholder groups from our new communications strategy do you consider yourself (Please indicate ALL that apply):

Family

Heads of delegations to TC or EFC	13%
Delegates – TC, EFC, WPFES, workshops	31%
Teams of Specialists	34%
National contact points for market statistics, forest resources, certification	31%

Partners

FAO Forestry Department	19%
MCPFE	13%
UNECE (secretariat)	19%
EFI	13%
ITTO	8%
ILO	5%
UNFF	7%
EU including DGs & Eurostat	15%
IUFRO	14%

“Outsiders” in other sectors of:

Transportation	1%
Energy	5%
Agriculture	8%
Environment	15%
Regional development	7%
Trade	15%

Policy heads

Head of Forest Services	11%
Forest Ministers	3%

Supervisors

Missions – Geneva and NYC	3%
Auditors	3%
FAO	8%
UNECE (Commission)	8%

Beneficiaries/Contributors

National forest admin/services	25%
Research institutions	23%
Trade associations	9%
Universities	18%
Consultants	22%
Info-seekers	10%
Companies	12%

Commentators/Opinion Makers

ENGOS	11%
Media	11%

14. Which work area within the Timber Branch do you interact (Please indicate ALL that apply)

WA1 Markets and statistics	73%
WA2 Forest resources assessment	43%
WA3 Long-term outlook studies	41%
WA4 Social aspects of forestry	25%
WA5 Policy analysis	37%
None	2%

15. How often do you participate at one of our meetings?

Never	26%
Less than once a year	41%
Once a year	23%
More than once a year	11%

16. How often do you check the TC/EFC website?

Once or more times each month	23%
Once a month	36%
Less than once a month	40%
Never	1%

17. Which outputs do you use or redistribute to your clientele? (Please indicate ALL that apply)

Market analyses	71%
Resource analyses	59%
Long-term outlook studies	51%
None	10%

Annex 2. Survey



**Timber Committee
Economic Commission for Europe**



**European Forestry Commission
Food and Agricultural Organization**

UNECE/FAO Timber Branch Market-Related Outputs Survey

I. Objectives

1. Evaluate all market-related outputs to enable a sound basis for decision on their content, timing and quality level.
2. Facilitate a Timber Branch stakeholder analysis.
3. Measure some achievements of the UNECE/FAO Forest Products Marketing Programme.

II. Background

We conduct periodic user surveys of UNECE/FAO Timber Branch's market-related outputs (and other outputs too). The FAO/UNECE Working Party on Forest Economics and Statistics charged the UNECE/FAO Team of Specialists on Forest Products Markets and Marketing to conduct a wider survey of the Branch's contacts for all of our market-related outputs. The analysis of the results is to be presented by the Team to the Working Party on 22 March 2005.

III. Publications

1. *Forest Products Annual Market Review*. For more info see:
www.unece.org/trade/timber/docs/fpama/2004/fpama2004a.htm

If you are not familiar with this output, go to next question.

Rating content and quality:

- Excellent
- Satisfactory for my needs
- Below satisfactory. Please explain improvement needed:

How often should this be produced?

- Continue annually
- Continue periodically whenever needed
- Discontinue. Please explain:

Additional comments?

2. *Status of Forest Certification in the UNECE Region, a previously annual UNECE/FAO Geneva Timber and Forest Discussion Paper*. For more info see: www.unece.org/trade/timber/docs/certification/cert.htm

If you are not familiar with this output, go to next question.

Rating content and quality:

- Excellent
- Satisfactory for my needs
- Below satisfactory. Please explain improvement needed:

How often should this be produced?

- Continue annually
- Continue periodically whenever needed
- Discontinue. Please explain:

Additional comments?

3. Country market profiles. Periodically we highlight a specific country's forest products markets (formerly in a special chapter of the *Forest Products Annual Market Review*) or in a *Geneva Timber and Forest Discussion Paper*. For an example see: www.unece.org/trade/timber/docs/dp/dp-32.pdf

If you are not familiar with this output, go to next question.

Rating content and quality:

- Excellent
- Satisfactory for my needs
- Below satisfactory. Please explain improvement needed:

How often should this be produced?

- Continue annually
- Continue periodically whenever needed
- Discontinue. Please explain:

Additional comments?

IV. TC Market Discussions

4. Discussions in session between experts and delegates

If you are not familiar with this output, go to next question.

Rating content and quality:

- Excellent
- Satisfactory for my needs
- Below satisfactory. Please explain improvement needed:

How often should this be produced?

- Continue annually
- Continue periodically whenever needed
- Discontinue. Please explain:

Additional comments?

5. Exchange of market-related policy issues during the TC Market Discussions

If you are not familiar with this output, go to next question.

Rating content and quality:

- Excellent
- Satisfactory for my needs
- Below satisfactory. Please explain improvement needed:

6. Expert presentations. For more info see: www.unece.org/trade/timber/docs/tc-sessions/tc-62/presentations/item-3a.htm

If you are not familiar with this output, go to next question.

Rating content and quality:

- Excellent
- Satisfactory for my needs
- Below satisfactory. Please explain improvement needed:

How often should this be produced?

- Continue annually
- Continue periodically whenever needed
- Discontinue. Please explain:

Additional comments?

7. TC annual market forecasts. For more info see: www.unece.org/trade/timber/mis/forecasts.htm

If you are not familiar with this output, go to next question.

Rating content and quality:

Excellent

Satisfactory for my needs

Below satisfactory. Please explain improvement needed:

How often should this be produced?

Continue annually

Continue periodically whenever needed

Discontinue. Please explain:

Additional comments?

8. TC annual market statements. For more info see: www.unece.org/trade/timber/mis/forecasts.htm

If you are not familiar with this output, go to next question.

Rating content and quality:

Excellent

Satisfactory for my needs

Below satisfactory. Please explain improvement needed:

How often should this be produced?

Continue annually

Continue periodically whenever needed

Discontinue. Please explain:

Additional comments?

9. Country market statements prepared for annual TC session. For more info see:

www.unece.org/trade/timber/mis/market/market-62/market-62.htm

If you are not familiar with this output, go to next question.

Rating content and quality:

Excellent

Satisfactory for my needs

Below satisfactory. Please explain improvement needed:

How often should this be produced?

Continue annually

Continue periodically whenever needed

Discontinue. Please explain:

Additional comments?

V. Website

10. TIMBER database of forest products consumption, production and trade. For more info see:

www.unece.org/trade/timber/database/timber.zip

If you are not familiar with this output, go to next question.

Rating content and quality:

Excellent

Satisfactory for my needs

Below satisfactory. Please explain improvement needed:

How often should this be produced?

Continue annually

Continue periodically whenever needed

Discontinue. Please explain:

Access and ease of use:

The statistics are easy to find, download and use

I have difficulty finding the specific statistics I need

I find access to TIMBER statistics impossible

Additional comments?

11. Timber Committee (TC) Market Discussions reports, presentations, press release. For more info see: www.unece.org/trade/timber/mis/forecasts.htm

If you are not familiar with this output, go to next question.

Rating content and quality:

- Excellent
- Satisfactory for my needs
- Below satisfactory. Please explain improvement needed:

How often should this be produced?

- Continue annually
- Continue periodically whenever needed
- Discontinue. Please explain:

Access and ease of use:

- The reports and presentations are easy to find, download and use
- I have difficulty finding the specific info I need
- I find access to reports and presentations impossible

Additional comments?

12. Certification website. For more info see: www.unece.org/trade/timber/mis/cfp.htm

If you are not familiar with this output, go to next question.

Rating content and quality:

- Excellent
- Satisfactory for my needs
- Below satisfactory. Please explain improvement needed:

How often should this be produced?

- Continue annually
- Continue periodically whenever needed
- Discontinue. Please explain:

Additional comments?

VI. UNECE/FAO Timber Branch stakeholder analysis

We will use the info above and below to analyse what our different stakeholders' needs are and how to better fulfil their needs.

13. Which of our informal stakeholder groups from our new communications strategy do you consider yourself (you may choose more than one):

Family

- Heads of delegations to TC or EFC
- Delegates – TC, EFC, WPFES, workshops
- Teams of Specialists
- National contact points for market statistics, forest resources, certification

Partners

- FAO Forestry Department
- MCPFE
- UNECE (secretariat)
- EFI
- ITTO
- ILO
- UNFF
- EU including Directorate-Generals and Eurostat
- IUFRO

“Outsiders” in other sectors of

- Transport
- Energy
- Agriculture
- Environment
- Regional development
- Trade

Policy heads

- Head of forest services
- Forest ministers

Supervisors

- Missions – Geneva and NYC
- Auditors
- FAO
- UNECE (Commission)

Beneficiaries/Contributors

- National forest administration or service
- Research institutions
- Trade associations
- Forest owners associations
- Universities
- Consultants
- Info-seekers
- Companies

Commentators/Opinion Makers

- Environmental non-governmental organizations
- Media

14. Which work area within the Timber Branch do you interact (you can choose more than one)

- WA1 Markets and statistics
- WA2 Forest resources assessment
- WA3 Long-term outlook studies
- WA4 Social aspects of forestry
- WA5 Policy analysis

15. How often do you participate at our meetings?

- Once a year
- More than once a year
- Less than once a year

16. How often do you check the TC/EFC website?

- Once or more times each week
- Once a month
- Less than once a month

17. Which outputs do you use or redistribute to your clientele?

- Market analyses
- Resource analyses
- Long-term outlook studies

Thank you for filling out this survey. Last questions:

Your name: _____ Descriptive title of your position: _____ Organization or company: _____
 Your e-mail: _____ Would you like a copy of the results of the survey e-mailed to you? _____