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TIMBER COMMITTEE
Fifty-seventh session
27-30 September 1999

MARKET DEVELOPMENTS IN 1999 AND PROSPECTS FOR 2000

(Item 4 of the Provisional Agenda)

Note by the secretariat

This document contains the schedule for the forest products markets discussions and the preparation of the market statement. The document requests timely submission of national market statements and forest products forecasts.

The Committee is invited to:

- discuss developments in forest products markets;
- draft a market statement for issue after the session;
- comment on the *Forest Products Annual Market Review*.

1. The market discussions at the fifty-sixth session of the Timber Committee are scheduled for Tuesday 28 September 1999.

2. Each forest products market segment will be introduced by a secretariat analysis of responses to the Timber Committee forecasting questionnaire for 1998-2000 and followed by expert presentations for the sector on which the Committee will be invited to discuss. Following is a proposed timetable, which could be adjusted according to length of discussions on individual market segments:

- (a) 1000 hours General economic developments in the ECE region and general developments in forest products markets by the secretariat;
- (b) 1030 hours Roundwood markets, including briefly woodpulp and paper;
- (c) 1130 hours Softwoods: markets for coniferous sawnwood and logs;
- 1300 hours End of morning session;
- (d) 1500 hours Hardwoods: markets for temperate and tropical non-coniferous sawnwood and logs;
- (e) 1600 hours Wood-based panels and engineered wood products markets (particle board, plywood and fibreboard including MDF);
- (f) 1700 hours Certified forest products markets;
- 1800 hours End of afternoon session.

Preparation of the Committee's market statement

3. The following timetable for preparing and approving the Committee's market statement and press release is proposed:

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| <u>Tuesday</u> | - morning and afternoon | Market discussions; |
| <u>Thursday</u> | - morning 0900 hours | Drafting Committee prepares statement, on the basis of a secretariat draft (as there will be no formal interpretation on Thursday morning, the secretariat proposes that the Drafting Committee be conducted in English); |
| | - afternoon | The draft statement (in English, French and Russian) is submitted for approval by the Timber Committee; |
| <u>Friday</u> | | Text of statement issued as press release with a summary table. |

4. The Committee's market statement will be published in the *Timber Bulletin* No.6 "Forest products markets in 1999 and prospects for 2000", with national forecasts and posted on the website.

5. In previous years the following countries have been represented at the Drafting Committee: Austria, Canada, Finland, France, Germany, Hungary, the Netherlands, Poland, Russian Federation, Sweden, United Kingdom and United States of America. However, every country is welcome to participate.

Country market statements

6. Delegations' market statements are imperative to the success of the market discussions as they provide the only means of insuring that all countries' market developments are announced to the other delegations and the secretariat (there is not sufficient time during the session to enable all individual country presentations). They also provide an opportunity to explore certain issues which are important but cannot be included in the Committee's syntheses. Delegations' attention is drawn to the explanatory notes for the Provisional Agenda (ECE/TIM/92) in relation to item 4. A format is suggested in Annex I.

7. This year, for the first time, countries are invited to submit their statements in written and *electronic* form. The former would be circulated to delegates at the session as in previous years; the latter would be posted on the timber website, for the benefit also of those who cannot attend the session, and so that delegations can read other countries statements before the session. Therefore delegations are invited to send an electronic copy of their statement, preferably by e-mail, but alternatively on diskette, by **13 September 1999** to the secretariat. The electronic version of the written statement may be in WordPerfect or Word.

8. Delegations are also reminded to send 120 copies of their written statements on developments in their forest products markets to the secretariat in Geneva for arrival by **13 September 1999**. At its fifty-fourth session the Timber Committee requested the inclusion of a special section in the statements on "markets for certified forest products". If it is not possible to send all 120 copies by the deadline, please ensure that at least an electronic version is transmitted (or as last resort, by fax). Please note that reproduction of written statements cannot be done at the session.

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| ECE Timber Section | E-Mail info.timber@unece.org |
| Trade Division | |
| Palais des Nations | Tel. + 41 22 917 2868 |
| CH-1211 GENEVA 10 (Switzerland) | Fax + 41 22 917 0041 |

9. The Timber Committee places high priority on "review of short-term forest products market developments and prospects" (09(B).1.3, priority 2 of programme of work) and "collection of forest products statistics and publication of the *Timber Bulletin*, (priority 4 of the programme of work). This second activity is shared with the European Forestry Commission. The secretariat feels that the ability to fulfil these most important mandates is directly contingent on prompt and complete replies to the questionnaires, as refined and endorsed by member countries. Delegations are reminded that the deadline for replies to the Timber Committee Questionnaire is **31 August 1999** and are requested to ensure that this deadline is adhered to. It is impossible to prepare the Committee's statistics and reports in time for the meeting unless all statistics are received by the deadline.

Forest Products Annual Market Review, 1997-1998

10. The "Forest products annual market review, 1998-1999", *Timber Bulletin*, Volume LII (1999), Number 3, will be published ahead of the session. It is intended to serve as a background document for the session's market discussions. To ensure distribution to meeting delegates, it will be placed on the Committee's website(<http://www.unece.org/trade/timber>).

11. Delegates will find a several special chapters in the *Review* and it is anticipated that some of their authors will give presentations during the market discussions. Improvements in the *Review* are directly from comments and suggestions received from the ongoing user survey of Timber Committee and European Forestry Commission products and services.

12. Delegates may suggest subjects for future special chapters, either current issues, new developments, trends or specific ECE or non-ECE forest products markets. Comments on the *Review* are welcome by the secretariat.

Annex

Suggested format for written country market statements

Written market statements are traditionally organized like the market discussions. It is suggested that the following subjects be addressed, where appropriate, for the current year as well as for the next year's forecast. Following this format will facilitate the uploading and reading of the electronic statements:

1. General economic trends affecting the forest and forest industries sector

2. Developments in forest products markets sectors

Pulp and paper

Roundwood including pulpwood

Softwood (sawnwood and logs)

Hardwood (sawnwood and logs)

Wood-based panels (particle board, fibreboard and MDF, OSB, plywood)

Certified forest products

3. Tables

Economic indicators

Forest products production and trade in 1998, 1999 and 2000.