

ECONOMIC
AND
SOCIAL COUNCILCONSEIL
ECONOMIQUE
ET SOCIAL

RESTRICTED

E/ECE/TIM/29
23 September 1949

ORIGINAL: ENGLISH

ECONOMIC COMMISSION FOR EUROPETIMBER COMMITTEEREPORT OF THE FIFTH SESSION HELD IN GENEVA

from September 19-23, 1949.

1. The Timber Committee held its 5th Session in Geneva from September 19 to 23, 1949. Representatives of the following countries took part in its deliberations: Austria, Belgium, Canada, Czechoslovakia, Denmark, Finland, France, Greece, Italy, Luxembourg, Netherlands, Norway, Sweden, Poland, Switzerland, United Kingdom, USA, and Yugoslavia. The Secretariat was provided by the joint FAO and ECE staff.

2. Chairmanship:

In the absence of the Chairman and the Vice-Chairman, the Committee unanimously elected Dr. Anton Ceschi (Austria) as Chairman for the Session.

3. Executive Secretary's Statement:

The Committee heard a statement from the Executive Secretary outlining the Secretariat's views with regard to the major items to be discussed during the session. It decided to defer discussion of the various sections of this statement to the items on the agenda to which they referred.

4. Adoption of agenda:

The Committee adopted the agenda, as submitted by the Secretariat, and added an additional item "Disposal of exceptional timber supplies caused by forest fires in France".

5. European Softwood Situation:

The Committee reviewed prospective softwood imports and exports for 1949 and 1950, and amended the estimates made at the fourth session in the light of subsequent developments. The results of this review are found on Tables Nos. 1 and 2, from which the following conclusions emerge:

Prospects for 1949: (in 1000 stds)

| | | |
|-----------------------|----------------------|---------------------|
| <u>Export</u> | from Europe | 2010 to 2270 |
| <u>supplies</u> | <u>from Overseas</u> | <u>360 to 440</u> |
| | Total: | 2370 to 2710 |
| <u>Import Demand:</u> | from Europe | 2387 |
| | Mediterranean & | |
| | <u>Overseas</u> | <u>450</u> |
| | Total: | 2837 |
| | <u>Difference:</u> | <u>467 to - 127</u> |

Last March, the gap between effective import demand and prospective supplies was estimated at 260 - 800,000 stds. It now appears that a seven per cent reduction in import demand and an increase in export availabilities of the order of 5% have reduced this deficit to 130 - 470,000 stds. Such a narrowing of the gap towards the end of the year is a normal occurrence. The new figures confirm that effective demand remains substantially above minimum exports and is even slightly in excess of maximum export availabilities. Accordingly, European exporting countries may expect to sell all the softwood available for export in 1949, while importing countries would thus be able to cover practically their entire effective demand.

Outlook for 1950: (in 1000 stds)

Export Supplies:

| | | |
|-------------|--------------|------|
| From Europe | 2005 | 2470 |
| " Overseas | 400 | 480 |
| Total: | 2405 to 2950 | |

Import demand:

| | |
|----------------------|--------------|
| From Europe | 2474 |
| <u>From overseas</u> | <u>475</u> |
| Total: | 2949 |
| Difference: | - 544 to + 1 |

Also for 1950, a reduction of the earlier anticipated gap between export availabilities and import supplies can be noted. Last March, the difference between these two figures had been estimated at 400,000 to 1 million stds, while the present estimates indicate that the difference is likely to run between an approximate balance and a deficit of 540,000 stds.

The main reason for this change is to be found in the French forest fires which, according to the announcement made by that country's

delegation, improve Europe's timber balance by over 500,000 stds. It had indeed been expected that France would need to buy 290,000 stds in 1950. Present French plans provide for imports of only 50,000 stds during the next year and for export availabilities of 300,000 standards.

Other major changes are due to higher estimates for prospective exports from Austria, Finland, Roumania,⁽¹⁾ and the USSR,⁽¹⁾ which might attain a total of some 320,000 stds if the maximum export programmes of these countries can be achieved. On the other hand, exports of Western Germany earlier placed at 100,000 stds will be reduced to the amount of timber felled before December 31, 1949, in the French concessions in Germany to be imported into France in 1950.

Total European import demand now placed at 2.9 million stds, is 10% below earlier estimates, and this reduction is almost entirely due to the French forest fires.

A fundamental difference in the Committee's estimates of export availabilities should be noted between the figures for Europe and North America. European export estimates indicate in each case the maximum availabilities which countries expect to place on the market. For the USA and Canada the estimates indicate merely probable sales with due consideration to restrictions resulting from European financial difficulties. It has been indicated that maximum export availabilities from North America to Europe in 1950 could exceed a million standards although the figures for prospective shipments inserted for these two countries in the tables run from 380,000 - 400,000 stds.

The Committee concludes that if present estimates prove correct there should be no danger of a timber shortage in 1950.

The Committee also stresses the fact that a substantial change of the situation might occur when France's additional timber supplies have been absorbed. The importance of increasing export supplies of softwood for 1951 and beyond therefore remains unchanged.

6. Disposal of exceptional timber surplus caused by forest fires in France:

The Committee heard a detailed report from the French representative on the French forest fire disaster and was unanimous in expressing its sympathy to the Government of France.

(1) Unconfirmed Committee estimates.

It noted the figures about the extent of the damage and the fact that for a year or two its effect would be to transform France from a country normally covering half of its softwood needs by imports to a substantial exporter of softwoods.

In accordance with the desire of the French representative, the Committee merely noted that negotiations had been initiated with several countries for the disposal of the softwood which France is compelled to export. The Secretariat was instructed to circulate the full statement of the French representative regarding the fire disaster and its effects as a separate document to all governments. The Committee expressed its willingness to review the matter further should present efforts of the French Government to sell its timber surplus meet with difficulties.

The Committee also registered a statement of the French representative that the figures given regarding the additional timber supplies to be expected, and their effect on France's position in the international timber market, should be regarded as provisional, since time had not yet permitted the assessment of the exact amount and composition of the timber attacked by the fire which can still be salvaged.

7. Timber Loan:

In accordance with the Committee's instructions, the Secretariat has continued to assist interested governments in their negotiations regarding the conclusion of the timber loan. Shortly before the session a number of major points of principle still remained unsolved but on Saturday, September 17, a confidential cable was received from the International Bank for Reconstruction and Development in Washington for the information of Committee members reading as follows:

"1. RE MY CABLE 16th AGREEMENTS NOW REACHED IN PRINCIPLE WHICH SHOULD PERMIT EARLY PRESENTATION TO BANK BOARD OF DIRECTORS OF YUGOSLAV AND FINNISH TIMBER EQUIPMENT LOANS STOP DISCUSSIONS CONCERNING LOAN TO CZECHOSLOVAKIA STILL UNDER WAY STOP

2. FOLLOWING COUNTRIES HAVE AGREED IN PRINCIPLE TO ENTER INTO TIMBER PAYMENTS AGREEMENTS IN CONNECTION WITH YUGOSLAV AND FINNISH LOANS
RE YUGOSLAV LOAN OF DOLLAR 2,700,000, UK DOLLAR 1,700,000, NETHERLANDS DOLLAR 400,000, ITALY DOLLAR 400,000, FRANCE DOLLAR 200,000

RE FINNISH LOAN OF DOLLAR 2,300,000, UK DOLLAR 1,400,000,
DENMARK DOLLAR 450,000, BELGIUM DOLLAR 450,000 STOP

3. IF LOAN AGREEMENTS SIGNED BANK EXPECTS TO SEND
REPRESENTATIVE TO EUROPE TO ASSIST IN EXECUTION OF TIMBER
PAYMENTS AGREEMENTS STOP WILL ADVISE IF FURTHER ASSISTANCE
OF ECE TIMBER COMMITTEE SECRETARIAT NEEDED STOP

4. FOREGOING ONLY FOR INFORMATION OF MEMBERS OF TIMBER
COMMITTEE STOP IMPERATIVE THAT NO PUBLIC ANNOUNCEMENT OR
PRESS RELEASE BE MADE REGARDING LOANS SINCE PREMATURE
PUBLICITY WOULD PREJUDICE THEIR SUCCESSFUL CONCLUSION

ILIFF INTBAFRAD."

The developments reported in this cable were still largely unknown to the representatives of interested countries when the Timber Committee opened its session and it therefore became necessary to agree that all discussions regarding the timber loan which took place during the meeting be regarded as informal and subject to the reservation that the validity of statements made by representatives depended in each case upon confirmation by their respective governments of the facts reported in the Bank's cable quoted above. During the meeting information tending to confirm the facts contained in the Bank's cable was received by the representatives from Finland, Italy and the Netherlands.

The Committee further stressed that the changes in currency rates which began on September 18, would involve among other results an increase in the amounts of Tranche B. timber to be delivered by exporting countries, in connection with the repayment of the Bank's loan.

The Committee heard a statement from the representative of the United Kingdom that his Government's participation in the various loans as discussed below was subject to the following two conditions:

- a) that all negotiations be completed and papers signed by December 31, 1949;
- b) that the importing countries scheduled to participate in Tranche B. purchases should take up their shares by that date.

The representative of the Netherlands indicated that the same conditions applied to his country's participation in the Yugoslav loan.

The Committee noted the following position with regard to the loans under negotiation:

FINLAND:

Arrangements have been completed between Finland and the Bank and also with the three importing countries participating in the loan, including Tranche B. timber sales. Payments agreements still need to be signed with the United Kingdom and remain to be negotiated with Denmark and Belgium, although the terms of these latter two agreements do not seem to raise any fundamental issues.

It is contemplated that a Finnish delegation will visit the three interested countries during the latter part of October at which time the payments agreements could be signed. It is noted that the Bank intends to send to Europe an officer to assist in these final negotiations. Representatives also expressed the wish that the Bank should communicate to all participating countries detailed payments schedules.

YUGOSLAVIA:

Complete agreement on all points has been reached between Yugoslavia and the Bank. Final equipment lists as well as information necessary for the other schedules attached to the loan agreement have been supplied to Washington. Points still to be settled are:

- a) doubts raised by the British Government regarding certain items in the Yugoslav equipment list. Informal conversations among representatives attending the Timber Committee have resulted in clarifying that issue;
- b) the details of Tranche B. sales have not yet been negotiated with the Netherlands. The representative of the Netherlands indicated that his Government was now prepared to settle the Tranche B. timber contract and payments agreement with Yugoslavia without delay;
- c) the Tranche B. contract with Italy remains to be concluded and raises two technical questions:
 - (1) deliveries under Tranche B. must be effected beyond the period of the present Italo-Yugoslav trade

agreement which ends on December 31, 1950; (2) the Italian Government believes that the Tranche B. sales should be over and above the quantities contained in the current trade agreement and therefore necessitate a supplementary agreement between the two countries. The Yugoslav Government is prepared to accept that view and will approach Rome as quickly as possible to conclude the necessary Tranche B. and payments agreements;

- d) a more serious difficulty arises with regard to France which as a result of recent forest fires has become a timber exporter. Imports of Tranche B. timber are difficult to reconcile with the prospective position of France in 1950 and maybe even in 1951. It will therefore be necessary to explore with competent authorities how France's participation in the loan could best be organized, possibly by authorizing that country to arrange for deferment of Tranche B. deliveries from Yugoslavia in the value of 200,000 dollars until the end of 1951 or the beginning of 1952. The Committee drew the attention of the French Government to the fact that no matter what payment dates are agreed upon the papers must be signed by December 31, 1949.

Also with regard to Yugoslavia's loan representatives expressed the hope that the Bank would circulate to all interested countries at the earliest moment detailed payments schedules of Tranche B. delivery dates.

CZECHOSLOVAKIA:

The Czechoslovak representative presented a detailed statement attached to this report (Annex I) outlining the efforts made by this country since the end of the fourth session to bring the timber loan to a rapid conclusion. Although agreement on all aspects of the loan had been reached with the Bank by May, the attempts to complete Tranche B. timber sales with the United Kingdom and the Netherlands had failed so far. He therefore requested the Timber Committee to give a final answer whether the project could be carried out or should be abandoned.

The representative from the United Kingdom indicated his Government's willingness in principle to conclude a Tranche B agreement with Czechoslovakia for 400,000 dollars provided these negotiations could be terminated before 31 December, 1949, and provided other importing countries participate in the project as contemplated. The Netherlands representative advised the Committee, that, under his present instructions his Government was not in a position to make dollars available in connection with the Czechoslovak timber loan. In view of this attitude and as long as no importing country could be found to take up the rest of Czechoslovak Tranche B the Committee noted that the United Kingdom would be unable to go ahead with the project.

The Timber Committee felt that Czechoslovakia had taken all possible steps to bring the project to a rapid conclusion and expressed the hope that the Netherlands Government would reconsider its position or that some other importing country would be prepared to replace the Netherlands for the purchase of Tranche B timber. Entirely upon the Secretariat's initiative, and without any commitment on either side, the representative of the Bizone agreed to approach the competent authorities immediately upon his return and to keep the Executive Secretary informed.

The Czechoslovak delegate stated that he interpreted the outcome of the discussions as a negative answer and reserved for his Government complete freedom of action. In particular failing a satisfactory solution by 15 October he stated that Czechoslovakia would not be able to pursue the loan project further. The statement made by the representative of Czechoslovakia at the conclusion of the debate on this point is attached (Annex II).

The Committee also registered the fact that meanwhile Czechoslovakia is under no obligation as to the amounts of softwood to be placed by her on the European timber market.

8. Pitprops:

The Committee reviewed figures presented during the session and made certain amendments after consultation with the delegates concerned. Certain estimates given in the session by the committee regarding export availabilities of the USSR and the Russian Zone of Germany, as well as import requirements of Hungary, were also

amended after due consideration of information provided by importing countries and by exporting countries. A line has been added to the table in order to provide for other exports which cannot be specified in details but are known to provide certain import requirements listed in the table. Finally some arithmetical corrections have been made.

A new table giving effect to these changes is attached to this report. Examination of this table shows a surplus of 210,000 cu.m. in 1949. For 1950, a deficit of 1,509,000 cu.m. is shown but this does not take into consideration possible exports from Canada and the USA from which sources large quantities are available.

In 1949, the stocks which according to table 5 of document TIM/32 prepared by the Secretariat were to be considered as normal at the beginning of the year, increased substantially in France, Holland, and in the United Kingdom, owing to new availabilities. It should however be pointed out that the increase of stocks in France shown for 1949, due to the additional French exploitation as a result of the forest fires in the Landes, may be spread over 1950. The yield of this exploitation is not yet known in view of the uncertain amount of wood that can be produced.

For 1950, a deficit appears to exist of approximately 10% of total estimated requirements. However, the following factors have to be taken into account:

i. Requirements at this stage are liable to be over-estimated and export availabilities are also assessed on a conservative basis; for instance if contracts are placed early with Finland it is possible that that country may be able to reach the volume of exports attained in 1949; there is also the exportable surplus shown for 1949 to be taken into account,

ii. France has indicated export availabilities of only 200,000 cu.m., but owing to increase in her 1949 stocks she may well be able to export a larger quantity, in particular with regard to the requirements of the Sarre.

iii. Stocks in certain consumer countries also show increases in 1949 which could offset the import deficit in 1950.

iv. Likely exports from Canada and USA in 1950 are difficult to assess at this stage but substantial quantities can be provided from these sources if contracts are placed.

After carefully reviewing the above-mentioned factors the Committee is of the opinion that the pitprop situation in 1950 should not present any serious problems, but considers that it should be kept under careful review.

9. Brazilian Softwoods:

The FAO has advised the Timber Committee of the existence of substantial resources mainly untapped of good softwood called "Parana Pine" in Southern Brazil, and drew attention of member countries to the fact that an industrial development of these resources with the aid of modern logging and saw-milling techniques might open within a few years a source of additional softwood supplies to Europe of the order of 100,000-200,000 stds. annually. The Committee noted the information regarding the possibilities of future softwood supplies from Brazil, expressed interest in the project and the wish to be kept informed about its progress. It assumed that Brazilian producers and exporters would examine the marketing possibilities for their woods in the normal manner. Delegates expressed the hope that Brazilian industrialists would utilize European experience and wood-working machinery.

10. Woodpulp:

In accordance with the instructions of the Committee's third and fourth sessions, the Executive Secretary placed on the agenda a review of the World Conference on wood pulp problems, that had been organized by FAO in April 1949 in Montreal, and presented to the Committee in his opening statement and during the debate an analysis of the Secretariat's views on this matter. In particular he reported the Secretariat's impression that the conclusions of the Montreal conference needed to be supplemented and informed the Committee that a study on the structure and location of pulp industries and on the consumer demand for their products was under preparation as a joint project of FAO, UNESCO and ECE. The Committee noted the report of the Montreal conference and having heard the statements of the Secretariat and the discussions during the meeting, concluded that the information available at this time to the Committee regarding the international pulp situation as it affects Europe called for no action by the Timber Committee. This conclusion was unanimously accepted by the Committee but certain delegations added the following reservations:

The delegations of Finland, Sweden, Norway and the United Kingdom stated on behalf of their governments: that their acceptance of this

conclusion was without prejudice to the attitude of their governments if the Timber Committee were to be invited at a future date to consider again the international pulp situation as affecting Europe. It was further stated by Finland, Norway and the United Kingdom that they doubted very much the advisability of the survey mentioned by the Executive Secretary. They reserved their position with regard to the provision of estimates and information which might be requested in connection with such a survey, partly because commercial interests might in some cases be unwilling to make information available, and partly because the validity of any long-term statistical forecasts would be very doubtful.

The Swedish representative did not wish to make any formal pronouncement on the study undertaken by the Executive Secretary but referred to statements made during the debate to the effect that he largely shared the hesitations just recorded.

The representative from France stated for the record that his government attached considerable importance to the European pulp wood situation and therefore welcomed the study undertaken and wished that the Secretariat should follow the problem.

11. Report on more rational utilization of wood:

The Committee received Mr. Campredon's second report which completed the investigation he had been entrusted to carry out. It expressed its gratitude to Mr. Campredon for the excellency of the document, for his untiring efforts in assembling the necessary materials, and congratulated him on having made a major technical contribution. The Secretariat was instructed to prepare as soon as possible printed English and French versions of both parts of Mr. Campredon's report, and to circulate these with a covering letter drawing the attention of governments to the importance of Mr. Campredon's proposals. It was suggested that this letter should also request governments to indicate whether or not they were willing to initiate action, and along what lines. In the affirmative they should be asked to nominate a technical agency with whom Mr. Campredon could maintain contact in preparing a set of specific proposals for governmental action. When these proposals are ready and have been checked with the national experts concerned, they will be placed before the Timber Committee.

12. Programme of Work:

The Committee was unanimously of the opinion that its continuing existence was obviously necessary, both in the interests of producing and consuming countries, and, in view of the importance of the timber problem in the economy of Europe. After discussion of its future programme of work, the Committee recommended that its terms of reference should be authorized by the Economic Commission for Europe as follows:

"The Timber Committee is authorized:

1. To continue the collection and publication of adequate statistics on primary forest products.
2. To publish periodic analyses of the Timber market situation in Europe.
3. To keep the position of the principal forest products⁽¹⁾ such as sawn softwood and pitprops under close review, and to make such recommendations to governments as it may deem necessary as a result thereof.
4. To pay particular attention to the possibilities of the more rational utilization of wood."

13. Statistics:

The Committee received a questionnaire on roundwood requirements by products referred to it for further action by the Second Session of FAO's European Commission on Forestry and Forest Products. It also was advised of the proposal made by that Commission for the organization of a world statistical conference on forestry and forest products.

The Committee assumed that a decision regarding the proposed statistical conference would be taken next November by the Annual Conference of FAO and saw no need to add any further suggestions.

It was anxious to stress, however, the great difficulties which seemed to arise in connection with answering the questionnaire of roundwood requirements and exports and that it would be difficult to include this questionnaire in its statistical programme.

14. Next Meeting: The date and place of the next meeting will be decided by the Executive Secretary, in consultation with the Chairman and Vice-Chairman of the Timber Committee.

Note: (1) The Committee decided at its fifth session that "the information available at this time to the Committee regarding the international pulp situation as it affects Europe called for no action by the Timber Committee."

STATEMENT BY THE DELEGATE OF CZECHOSLOVAKIA

Mr. Chairman, Gentlemen,

Concerning the question of the loan, the plan for which was prepared in the Timber Committee, I should like, in the name of my Government, to draw attention to the following facts:

At the Fourth Session of the Timber Committee last March, I stated that:

- (1) Czechoslovakia was in principle prepared to begin negotiations with a view to obtaining a dollar loan from the International Bank for the purchase of forest equipment from America
- (2) Should that loan be granted to us, Czechoslovakia would undertake to export during each of the years 1949 and 1950, 20,000 extra standards of timber, naturally on the main condition that the countries importing Tranche B would pay, or, rather, would liquidate that loan by making direct payments in dollars to the Bank.

Our statement was supplemented by statements made by the representatives of the Netherlands and the United Kingdom, i.e. of the countries which had been proposed as importers of the Czechoslovak Tranche B. According to the statements of those representatives, those two countries were in principle prepared to undertake negotiations with us concerning the payment in dollars for certain quantities of timber. Those payments were to take place in 1949 and 1950, until the loan in question had been repaid. Those countries stated that they were prepared to begin negotiations as soon as they had been informed by the Executive Secretary that the progress of the negotiations between Czechoslovakia and the Bank justified such a step. The Timber Committee took note of all these statements, approved them and recommended that all the parties concerned settle all the questions pending in a spirit of collaboration. The facts which I have just mentioned appear also in the official publications prepared by the Secretariat during and after the Fourth Session.

Taking into consideration the recommendations of the Timber Committee, we at once, at the end of March, began negotiations with the International Bank. The Bank, acting on the basis of the conclusions reached, and the recommendations made at the Fourth Session, stated, as early as the beginning of April 1949, that it was ready to grant us a loan of 800,000 dollars. It also prepared a final text covering the loan. The Secretariat was immediately informed by us of the affirmative attitude taken by the Bank. I am sure that confirmation of that attitude was also communicated to the Secretariat direct by the International Bank in Washington.

At the same time as we requested a loan from the Bank, we began trade negotiations with the Netherlands and the United Kingdom, in which we endeavoured to obtain from the competent authorities of those two countries written confirmation of the promise made in principle by their representatives at the last Session of the Timber Committee. Each of these two countries was to purchase certain quantities of Czechoslovak timber by direct payments in dollars to the Bank. By these direct payments, to be made according to the scheme for the repayment of the loan, of sums amounting to approximately 400,000 dollars on the part of the Netherlands and the same on the part of the United Kingdom, with additional bank charges, the loan was to be completely repaid by these two countries on our behalf in the year 1950. The trade negotiations between the Netherlands and Czechoslovakia resulted in the conclusion of a fresh agreement, initialled on 10 May 1949, and signed on 7 July 1949. Unfortunately, the competent Netherlands authorities throughout all the negotiations concerning payment in dollars for certain quantities of Czechoslovak timber, adopted a purely negative attitude, contrary to the promise I mentioned that they had made. The fact that according to this agreement we are delivering fairly large quantities of timber to the Netherlands, in itself confirms that price and quality meet the requirements of Dutch merchants. The competent Netherlands authorities then took a final decision for reasons beyond our control and influence. It is a self-evident fact that by the attitude taken a corner-stone in the loan structure has been broken. The Secretariat was duly informed by us of this situation.

As for our negotiations with the United Kingdom, the situation was much the same from the beginning of the conversations until the end of August. The competent United Kingdom authorities rejected our request as

far as payments in dollars were concerned, whenever the request was made by our negotiators. At the beginning of August, we were informed by the Secretariat that the attitude of the competent United Kingdom authorities was not entirely negative, as we had considered it, and that the possibility existed of the deadlock being broken. According to information I received before leaving Prague negotiations between Czechoslovakia and the United Kingdom will soon reach a final stage. I hope that, at this Session, the United Kingdom representative will confirm this position and also confirm the promise made in March to pay in dollars for Tranche B. If we strike a balance of the situation as it is to-day, we may note that:

(1) Czechoslovakia has collaborated loyally in the scheme prepared and approved by this Committee, even though at the time we made several criticisms concerning the financial structure and the nature of this short-term loan. Czechoslovakia has done all she could.

(2) Six months have elapsed since the last session. These six months represent, for a very short-term loan as ours will be, a fairly considerable period. We are almost at the end of 1949, the year in which we should already have made deliveries of extra timber. This year has already almost ended without our having been able as yet to place orders for forest equipment, equipment which was to justify our extra deliveries and which, all being well, could be delivered within a period of approximately six months from the date of placing the orders.

(3) The question of the payment in dollars by the importing countries, i.e. by the Netherlands and the United Kingdom, still remains the principal condition of our interest in this matter of the loan. For that reason, I request that during this plenary session the representatives of the Netherlands and the United Kingdom should unequivocally confirm their intention of paying for Tranche B in dollars, in accordance with the promise they made in March.

I request the Secretariat to do its utmost to have the corresponding reply transmitted to us as soon as possible during this plenary session, for I share the opinion of Mr. Myrdal, the Executive Secretary, that the whole question of loans should be finally settled at this session. If the replies of the representatives of the Netherlands and the United Kingdom do not reach us during this session, we reserve our right to draw the appropriate conclusions in the circumstances.

FURTHER STATEMENT BY THE DELEGATE OF CZECHOSLOVAKIA

1) The Timber Committee, during its fifth session, took note of the statement made by the representative of Czechoslovakia on the subject of the timber loan to that country. The statement, which has been circulated by the Secretariat under reference ME/630/4^a will appear as an annex to the final report.

2) The Timber Committee is agreed that Czechoslovakia has done everything in its power to conclude the loan in accordance with the previous recommendations of the Timber Committee. The failure to conclude a loan agreement is due solely to the fact that the Netherlands, one of the countries envisaged as an importer of Tranche B timber, gave a negative reply, in the course of the present session, on the question of payment in dollars for Tranche B purchases and to the fact that the United Kingdom, the second country importing Tranche B timber, stated it was only willing to pay for its portion of Tranche B purchases in dollars on condition that the Netherlands agreed to pay in dollars for their portion of Tranche B timber from Czechoslovakia.

Table No. 1

IMPORTS OF SAWN SOFT-WOOD
(in 1 000 of Standards)IMPORTATIONS DE SCIAGES RESINEUX
(en 1 000 de Standards)E/ECE/TIM/29
Appendix I
Tableau No. 1

(incl Boxboards and Timber equivalent of Sawlogs)

(y compris les parties de caisse et les grumes exprimées en sciages)

| | IMPORTS - IMPORTATIONS | | | IMPORTS REQUIREMENTS - BESOINS D'IMPORTATION | | | | |
|------------------------------------|------------------------|----------|------------------|--|---|--|---|--------------------------------------|
| Principally importing countries | 1937 | 1948 | Jan. - June 1949 | Eff. demand as estimated in March 1949 | 1949 Eff. demand revised in Sept. 1949 | Eff. demand as estimated in March 1949 | 1950 Eff. demand revised in Sept. 1949 | Principaux pays importateurs |
| | | | jan - juin 1949 | Demande eff. estimée en mars 1949 | Demande eff. révisée en sept. 1949 | Demande eff. estimée en mars 1949 | Demande eff. révisée en sept. 1949 | |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | |
| Belgium (275) | (1) 190.0 | 104.0 | 46.0 | 180.0 | 150.0 | 190.0 | 150.0 | Belgique |
| Denmark | 171.0 | 147.0 | 29.0 | 160.0 | 140.0 | 175.0 | 175.0 | Danemark |
| France (475) | (1) 190.0 | 286.0 | 113.0 | 290.0 | 213.0 | 290.0 | (50.0) | France |
| Germany: Bizone | | 19.0 | 14.0 | 30.0 | 35.0 | 60.0 | 90.0 | Allemagne: Bi-zone |
| French Zone | | | | - | | - | | Zona Française |
| Russian Zone | | | | - | | - | | Zone Russe |
| TOTAL GERMANY | 731.0 | 19.0 | 14.0 | | 35.0 | | 90.0 | TOTAL ALLEMAGNE |
| Greece | 70.0 | (2) 52.0 | | 80.0 | 80.0 | 80.0 | 80.0 | Grèce |
| Hungary | 192.0 | 65.0 | | 85.0 | (85.0) | 85.0 | (85.0) | Hongrie |
| Ireland | 80.0 | 31.0 | 21.0 | 50.0 | (50.0) | 50.0 | (50.0) | Irlande |
| Italy | 312.0 | 70.0 | 82.0 | 171.0 | 171.0 | 171.0 | 171.0 | Italie |
| Luxembourg | 8.0 | 7.0 | 3.0 | 10.0 | 8.0 | 10.0 | 8.0 | Luxembourg |
| Netherlands | 374.0 | 320.0 | 112.0 | 325.0 | 340.0 | 340.0 | 350.0 | Pays-Bas |
| Portugal | .. | .. | | 5.0 | (5.0) | 5.0 | (5.0) | Portugal |
| Switzerland | 41.0 | 69.0 | 18.0 | 55.0 | 35.0 | 65.0 | 35.0 | Suisse |
| Turkey | 5.0 | 12.0 | | 50.0 | (25.0) | 50.0 | (25.0) | Turquie |
| United Kingdom | 2 366 | 1 025.0 | 340.0 | 1 100.0 | 1 050.0 | 1 200 | 1 200.0 | Royaume Uni |
| sub-total | 4 730.0 | 2 219.0 | 778.0 | 2 591.0 | 2 387.0 | 2 771.0 | 2 474.0 | sous-total |
| Egypt | 98.0 | 50.0 | | | | | | Egypte |
| French North Africa | 60.0 | | | | | | | Afrique du Nord française |
| Iraq | 14.0 | | | | | | | Irak |
| Lebanon | | 236.0 | | 250.0 | (250.0) | 250.0 | (275.0) | Liban |
| Palestine | 54.0 | | | | | | | Palestine |
| Syria | | | | | | | | Syrie |
| Other importing countries | (150.0) | | | | | | | Autres pays importateurs |
| Other countries normally exporting | (200.0) | 200.0 | | 200.0 | (200) | 200.0 | (200.0) | Autres pays normalement exportateurs |
| Total A: | 5 306.0 | 2 693.0 | 778.0 | 3 041.0 | 2 837.0 | 3 221.0 | 2 949.0 | Total A: |

Remarks:

(1) The average figure for imports in 1918-32 was 475.0 for France and 275.0 for Belgium

(2) Only January - September, 1948

General Remark:
Estimates figures are in brackets.

Remarques:

(1) La moyenne des importations pour la période 1918-32 a été de 475,0 pour la France, et de 275,0 pour la Belgique

(2) Janvier-septembre 1948 seulement.

Remarque Generale:
Les chiffres estimés sont entre paranthèses

Table No.2

L/ICE/TIM/29
Appendix II
Tableau No. 2

EXPORTS OF SAWN SOFTWOOD

(incl. Boxboards and Timber equivalent of Sawlogs)
(in 1000's of standards)

EXPORTATIONS DE SCIAGES RESINEUX

(y compris les parties de caisse et les grumes exprimées en sciages)
(en 1000 de standards)

| Principally exporting countries | EXPORTS - EXPORTATIONS | | | EXPORT PROSPECTS - PREVISIONS D'EXPORTATION | | | | | | | | Principaux pays exportateurs |
|--|------------------------|----------------------|------------------------------------|---|---|---|---|---|---|---|---|--|
| | 1937 | 1948 | Jan-June 1949 Jan-Juin 1949 | 1949 | | | | 1950 | | | | |
| | | | | Normal | Maximum | Normal | Maximum | Normal | Maximum | Normal | Maximum | |
| | | | | As estimated in March 1949 Estimées en mars 1949 | Revised in September 1949 Revisées en septembre 1949 | As estimated in March 1949 Estimées en mars 1949 | Revised in September 1949 Revisées en septembre 1949 | As estimated in March 1949 Estimées en mars 1949 | Revised in September 1949 Revisées en septembre 1949 | As estimated in March 1949 Estimées en mars 1949 | Revised in September 1949 Revisées en septembre 1949 | |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | |
| Austria | 317.0 | 104.0 | 126.0 | 100.0 | 120.0 | 200.0 | 280.0 | 100.0 | 120.0 | 200.0 | 280.0 | Autriche |
| Czechoslovakia | 176.0 | 70.0 | .. | 25.0 | 45.0 | 25.0 | 45.0 | 25.0 | 45.0 | (25.0) | (45.0) | Tchécoslovaquie |
| Finland | 1 045.0 | 524.0 | 109.0 | 350.0 | 420.0 | 450.0 | 500.0 | 350.0 | 420.0 | 400.0 | 470.0 | Finlande |
| France | | 82.0 | 50.0 | - | - | 100.0 ⁽⁴⁾ | 100.0 ⁽⁴⁾ | - | - | 300.0 ⁽⁴⁾ | 300.0 ⁽⁴⁾ | France |
| Germany : Bi-zone) French Zone) Russian Zone) | .. | 203.0 242.0 .. | 72.0 87.0 .. | 100.0 125.0 | 100.0 125.0 | 80.0 125.0 | 80.0 125.0 | (50.0) (50.0) | (50.0) (50.0) | (50.0) | (50.0) | Allemagne : Bizone Zone Française Zone Russe |
| Total Germany | | | 159.0 | | | 205.0 | 205.0 | | | - | - | Total Allemagne |
| Norway | 51.0 | 14.0 | 7.0 | 36.0 | 36.0 | 30.0 | 30.0 | 45.0 | 45.0 | 40.0 | 40.0 | Norvège |
| Poland | 334.0 | 40.0 | .. | 65.0 | 65.0 | 65.0 | 65.0 | 60.0 | 60.0 | 60.0 | 60.0 | Pologne |
| Portugal | .. | 22.0 | - | 41.0 | 41.0 | (40.0) | (40.0) | 41.0 | 41.0 | (40.0) | (40.0) | Portugal |
| Rumania | 353.0 | 100.0 | .. | 100.0 | 100.0 | (100.0) | (100.0) | 100.0 | 100.0 | (100.0) | (150.0) | Roumanie |
| Sweden | 820.0 | 548.0 | 177.0 | 510.0 | 560.0 | 550.0 | 575.0 | 550.0 | 575.0 | 550.0 | 575.0 | Suède |
| Yugoslavia | 197.0 | 140.0 | ⁽²⁾ 49.0 | 60.0 | 160.0 | 85.0 | 160.0 | 60.0 | 160.0 | 60.0 | 160.0 | Yugoslavie |
| U.S.S.R. | 1 362.0 | 100.0 | .. | 150.0 | 180.0 | (160.0) | (170.0) | (180.0) | (200.0) | (180.0) | (300.0) | U.R.S.S. |
| Sub-total | 4 655.0 | 2 189.0 | 836.0 | 1 662.0 | 1 952.0 | 2 010.0 | 2 270.0 | 1 611.0 | 1 866.0 | 2 005.0 | 2 470.0 | Sous total |
| Canada ⁽³⁾ | 508.0 | 295.0 | 103.0 | 450.0 | 450.0 | 250.0 | 300.0 | 550.0 | 550.0 | 300.0 | 300.0 | Canada ⁽³⁾ |
| U.S.A | 110.0 | 100.0 | .. | 100.0 | 300.0 | 90.0 | 90.0 | 90.0 | 300.0 | 80.0 | 100.0 | U.S.A |
| Other sources | - | ⁽¹⁾ 100.0 | .. | 20.0 | 80.0 | 20.0 | (50.0) | 20.0 | 80.0 | (20.0) | (80.0) | Autres provenances |
| TOTAL | 5 273.0 | 2 684.0 | 939.0 | 2 232.0 | 2 782.0 | 2 370.0 | 2 710.0 | 2 271.0 | 2 796.0 | 2 405.0 | 2 950.0 | TOTAL |

Remarks :

- (1) Including 82.0 stds from France
- (2) Only sawn softwood
- (3) Only to Europe
- (4) These figures are the result of first estimates in respect of the total volume of wood available after the Landes fires; they are subject to be revised later.

GENERAL REMARK :
ESTIMATED FIGURES ARE
IN BRACKETS.

Remarques :

- (1) Inclus 82.0 stds exportés par la France
- (2) Seulement sciages résineux
- (3) Seulement à destination de l'Europe
- (4) Ces chiffres résultent de premières estimations concernant le volume total du bois à exploiter après les incendies des Landes; ils sont susceptibles d'être révisés ultérieurement.

REMARQUE GENERALE :
LES CHIFFRES ESTIMES
SONT ENTRE PARENTHESES

FORECAST OF PRODUCTION, EXPORTS AND IMPORTS OF PITPROPS FOR 1949 and 1950
PREVISIONS DES PRODUCTIONS, EXPORTATIONS ET IMPORTATIONS DE BOIS DE MINES POUR LES ANNEES 1949 et 1950

E/ECE/TIM/29
Appendix III
Tableau 3
En milliers de mètres cubes

In thousands of cubic meters

| Countries | Production 1948 | 1949 | | | | | | 1950 | | | | Pays |
|-----------------|--------------------|---------------------|-------------------------|-------------------------|---------------------------------|----------------------------|---------------------------------|---------------------|-------------------------|-------------------------|----------------------------|------------------|
| | | Normal requirements | Indigenous production | Import requirements | | Export possibilities | | Normal requirements | Indigenous production | Import requirements | Export possibilities | |
| | | Besoins normaux | Production nationale | Besoins d'importation | | Possibilités d'exportation | | Besoins normaux | Production nationale | Besoins d'importation | Possibilités d'exportation | |
| | | | Revised in Sept. 1949 | Revised in Sept. 1949 | Imports by June 1949 | Revised in Sept. 1949 | Exports by June 1949 | | Revised in Sept. 1949 | Revised in Sept. 1949 | Revised in Sept. 1949 | |
| | | | Revus en septembre 1949 | Revus en Septembre 1949 | Importations jusqu'en juin 1949 | Revus en septembre 1949 | Exportations jusqu'en juin 1949 | | Revus en septembre 1949 | Revus en septembre 1949 | Revus en septembre 1949 | |
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | |
| Austria | 257 | 200 | 320 | | | 120 | 46 | 210 | 330 | - | 120 | Autriche |
| Belgium | 700 | 1 184 | 700 | 484 | 77 | - | 4 | 1 248 | 600 | 648 | - | Belgique |
| Czechoslovakia | (704) | 670 | 670 | | | (-) | | 670 | (670) | - | (-) | Tchécoslovaquie |
| Finland | 1 278(2) | - | 1 100 | | | 1 100 | 155 | - | 900 | - | 900 | Finlande |
| France | 2 125 | 3 750(5) | 3 600(6) | 350 | 342 | 200 | 171 | 2 800(8) | 3 000 | - | 200 | France |
| Germany Bizone | 4 077 | 3 505 | 3 163 | 337 | 161 | - | | | | | | Allemagne Bizone |
| French Zone | 839 | - | 1 010 | | | 1 010 | 488 | 3 630 | 3 393 | 507 | 270 | Zone française |
| Hungary | .. | (150) | (100) | (50) | | - | | (150) | (100) | (50) | - | Hongrie |
| Ireland | 8 | 2 | (11) | - | | (9) | 8 | (2) | (11) | - | (9) | Irlande |
| Italy | 126 | (180) | 181 | - | | 1 | 1 | 190 | 190 | - | - | Italie |
| Luxembourg | 120 | 15 | 80 | 5 | 2 | 70 | 16 | 10 | 50 | 10 | 50 | Luxembourg |
| Netherlands | 29 | 293(5) | 50 | 243 | 71 | - | | 289 | 40 | 249 | - | Pays-Bas |
| Norway | 78(2) | - | 90(7) (2) | - | | 90 | 34 | - | (80) | - | (80) | Norvège |
| Poland | 1 575 | 2 066 | (1766) | (450) | | (150) | | (2 066) | (1766) | (450) | (150) | Pologne |
| Portugal | (98) | (40) | (165) | - | | (125) | | 40 | (165) | - | (125) | Portugal |
| Saar | .. | 517 | (30) | (487) | | - | | 500 | (30) | (470) | - | Sarre |
| Sweden | 195(2) | - | 600(2) | - | | 600 | 275 | - | 400 | - | 400 | Suède |
| Switzerland | (14) | - | 10 | - | | 10 | | - | 30 | - | 30 | Suisse |
| Turkey | 110 | 203 | (71) | (132) | | - | | (203) | (71) | (132) | - | Turquie |
| United Kingdom | 624 | 3 104(5) | 600 | 2504 | 853 | - | | 3 094 | 600 | 2 494 | - | Royaume-Uni |
| USSR (4) | .. | .. | (750)(2) | | | (750) | | - | (850)(2) | - | (850) | URSS |
| Yugoslavia | 61(2) | 60 | 245 | | | 185 | 68 | 60 | 245 | - | 185 | Yougoslavie |
| TOTAL | | | | | | | | | | | | TOTAL |
| EUROPE | 13 018 | 15 939 | 15 317 | 5042 | 1 506 | 4 420 | 1 266 | 15 162 | 13 521 | 5 010 | 3 369 | EUROPE |
| Canada | 958 | - | 700(2) | | | 700 | 143 | - | ? (9) | - | ? (9) | Canada |
| U.S.A. | - | - | .. | | | | | - | ? (9) | - | ? (9) | Etats-Unis |
| Other countries | - | - | 132(2) | | | 132 | | - | (132)(2) | - | (132) | Autres pays |
| Total | 13 976 | 15 939 | 16 149 | 5 042 | 1 506 | 5 252 | 1 409 | 15 162 | 13 653 | 5 010 | 3 501 | Total |
| Balance | | | +210 | | | +210 | | | -1509 | | -1 509 | Balance |

Remarks (1) Estimates made by the Secretariat are in brackets
(2) Exports as production
(3) Excluding 100,000 cubic meters carried over from 1948
(4) Estimates include the USSR Zone of Germany
(5) Including increases in stocks
(6) Assuming all pitprops from Landes will be out in 1949.
(7) Production 31/6/48 to 1/7/49 100.000 cu.m.
(8) Real requirements are 3.256.000 cu.m. Balance covered by stock withdrawals.

(9) See report, paragraph : Pitprops.

Remarques (1) Estimations faites par le Secrétariat sont entre parenthèses
(2) Exportations comme production
(3) Non compris 100,00 m.3 reliquat de 1948
(4) Estimations comprenant la Zone russe de l'Allemagne
(5) Y compris l'augmentation des stocks.
(6) En supposant que tous les bois des mines landais seront coupés en 1949.
(7) Production 31/6/48 - 1/7/49 100.000 m3.
(8) Besoins réels 3.256.000 m3. Différence couverte par les prélèvements sur les stocks.
(9) Voir rapport, paragraphe : Bois de mines.