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SOCIAL COUNCIL



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ECONOMIC COMMISSION FOR EUROPE

TIMBER COMMITTEE

REPORT OF THE SIXTH SESSION

Held at the Palais des Nations - Geneva
from April 3rd to 5th, 1950.

1. The Timber Committee held its Sixth Session in Geneva from April 3 to 5, 1950. Representatives of the following countries took part in its deliberations: Austria, Belgium, Canada, Denmark, Egypt, Finland, France, Italy, Luxembourg, Netherlands, Norway, Poland, Sweden, Switzerland, United Kingdom, United States of America, Yugoslavia. A telegram of regret was received from Czechoslovakia. An Observer from the International Labour Office was also present.
2. The Committee elected by acclamation Dr. Anton Ceschi, Austria, as Chairman and Mr. A. Kouwenaar, Netherlands, as Vice-Chairman.
3. The Committee heard a statement from the Executive Secretary reviewing the main events of the timber market situation during 1949 and discussing briefly the major items on the Agenda. It decided to defer consideration of this statement to the appropriate items on the Agenda.
4. Adoption of the Agenda. The Committee adopted the provisional Agenda as submitted by the Secretariat, transposing items 7 and 8 (E/ECE/TIM/30 Rev.1.)

5. European Softwood Situation

(a) 1949. The Committee noted the Secretariat Review.

The only point raised was with respect to the influence of reduction in the use of fuelwood on the production of industrial wood. The Committee was in accord with the policy of reducing the burning for fuel of all categories of wood utilizable for industrial purposes and the rational utilization of material suitable only for fuelwood.

The Committee commented on the lack of precise figures for stocks for some important producing countries and hoped that such could be made available in the future.

(b) 1950 & 1951. As regards sawn softwood, including the sawnwood equivalent of sawlogs, the Committee reviewed prospective imports and exports for 1950 and the outlook for 1951, as set forth in Tables 1 and 2, and drew the following conclusions therefrom:

1; Prospects for 1950. (in 1000 stds.)

Export Supplies

From Europe:	1935 to 2305
From Overseas:	425 to 500
	<hr/>
Total:	2360 to 2805

Import Demand

European:	2283
Mediterranean countries	150
Other normally exporting countries	100
	<hr/>
Total:	2533

The Committee noted that the difference between demand and supply varied from a deficit of 173,000 standards to a possible surplus of 272,000 standards provided all producing countries attained their maximum possible exports. The Committee felt that these variations were within the limit of error inherent in its calculations, because of the estimates which needed to be made both of

exports from countries not represented and of the requirements of some important importing countries. In this connection the Secretariat was asked to obtain, if at all possible, statistics of past imports of countries normally importing from Europe. It came to the conclusion that in the light of the present restricted consumption levels in Europe an approximate equilibrium would continue in 1950, even if an unexpectedly large increase of U.S.S.R. timber became available on the markets of Western Europe.

ii. Outlook for 1951. (in 1000 stds.)

Tables 1 and 2 indicate the following situation:

Export Supplies

From Europe:	1845 to 2205
From Overseas:	475 to 550

Total:	2320 to 2755
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Import Demand

Europe:	2450
Mediterranean countries:	150
Other normally exporting countries:	100

Total:	2700
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The Committee noted that these figures indicated an increase in import demands despite the fact that it had appreciably reduced its estimates of requirements of Mediterranean and other normally exporting countries below the figures entered for previous years. On the other hand export availabilities showed a downward trend. The attainment of a balance between demand and supply, including imports from the dollar area, could therefore be a more difficult achievement in 1951. In general there appeared to be no indication of a sawn softwood surplus position developing in 1950 and 1951.

Representatives of importing countries stressed the importance of being able to import sawlogs for conversion in their domestic sawmills, within the limits of the quantities made available pre-war. The lack of these created a real problem in these importing countries.

In this connection the importing countries noted the apparent change in policy evinced by the report of Western Germany precluding all exports of sawn softwood and softwood logs.

(c) Proposed Price Index Study: The Committee, although realising the complexity of the problem, approved of a proposal that the Secretariat study the possibility of formulating internal price indices for timber in each country as a guide to changes in demand and supply. These would be correlated with general price movements. The Representative of Switzerland who introduced the discussion, was invited to collaborate with the Secretariat in this project. The report would be available at its next ensuing session.

6. Pitprops

The Committee noted the Secretariat Report on the European Pitprop Situation 1949. It noted the statement of the Representative of France that fire-damaged pitprops had not, in fact, been available in quantity in 1949. It set up a Working Party to review the position during 1950 and 1951 as a result of figures presented by Representatives of Member countries as compiled on Table 3. The Committee adopted the following report of the Working Party:

Report of the Pitprop Working Party

The figures supplied by the various countries represented at the Sixth Session, supplemented by estimates for those countries from which returns have not been received, show a deficit between import requirements and export availabilities for 1950 of 423,000 solid cu.m.

The Working Party are conscious of the high degree of estimation which has been necessary in the case of countries from which definite figures have not been received, and this has to be kept in mind in considering the importance of

the deficit now shown. This deficit represents less than 3% of estimated requirements for the year, and although the figures of certain countries already envisage some reduction in stocks over the year, the Working Party consider that the deficit could, if necessary, be met from current stocks in the hands of consumers.

The Working Party consider therefore that on the basis of the figures now before them, pitprop requirements during 1950 are likely to be met.

The deficit between import requirements and export availabilities revealed for 1951 is estimated slightly to exceed 1,000,000 solid cu.m. It is normal to find a large deficit in forecasting so far ahead, and the present figure is not at this stage considered alarming. Experience has shown the effect changes in the demand of pulpwood have upon pitprop availabilities, and the position for 1951 will need to be kept under review. In this connection the stimulating effect on production of the early placing of contracts must be noted.

A question which arose in connection with the stock figures provided by the Belgian delegate, shows that there is some difference of understanding regarding the basis upon which stock figures have to be provided, and the Working Party consider that the Secretariat should take the necessary steps to clarify the position in this respect.

7. French Forest Fires

The Committee heard a further statement by the Representative of France on the disposal of timber damaged by the disastrous 1949 fires in the Landes district. It noted the effective action which had been taken by France and registered the willingness of Member countries to give such further assistance in the disposal of remaining surplus quantities as lay within their power. The Representative of France stressed the existence of large quantities of fire-killed wood suitable for the manufacture of kraft pulp still unsold.

8. Progress Report on 'More Rational Utilization of Wood'

The Committee received a further report from its expert Consultant, Mr. Campredon, on this subject. He informed the Committee that a large number

of Member Governments had appointed experts for consultation with him following the request made by the Executive Secretary on behalf of the Timber Committee. The Committee approved the proposals for future action made by Mr. Campredon including the establishment of a Working Party consisting of the above nominated experts, which would meet early in July. This Working Party would examine previous reports presented to the Timber Committee, indicate what practical steps in implementation of recommendations have already been made, and what further measures it would propose for adoption by Member Governments. The results of the Working Party's deliberations would be presented to the next ensuing meeting of the Committee. The Committee discussed in general the proposal for the establishment of a European Timber Documentation Centre. Its first reaction was favourable but the Committee concluded that it would defer any recommendation until the matter had been considered by the Working Party.

9. Timber Utilization Trends

The Committee considered this item concurrently with that on the more rational utilization of wood. The Representative of Switzerland stressed the fact that the changed market situation involved a reorientation of the work of the Committee. In his view the use of substitute materials for wood in certain producing countries was presenting problems in timber disposal, particularly affecting the lower grades. Progress in rationalization in the use of wood was necessary to enable it better to withstand the competition of substitutes which had established themselves during the timber shortage period. The most rational use of wood was in the interest of the economy of all countries.

In the discussion which followed it was brought out that there is a group of producing countries where a shortage of timber no longer exists, and it is in their interest that wood should assume its proper place in the national economy. Nevertheless, regarded as a whole, the present European timber equilibrium is still based on an artificially restricted consumption level, so that it cannot be stated that there is no longer a general timber shortage. Economic considerations in each particular country would decide whether and to what extent substitutes would continue to be employed in place of timber. The

Committee decided that the question of the use of wood substitutes should be referred to the Working Party of experts established as detailed in Section 8 above, to be taken into consideration in formulating its recommendations,

10. Draft Report of the Timber Committee to the Fifth Session of the Economic Commission for Europe.

The draft report of the Timber Committee to the E.C.E. was approved with minor amendments.

11. The Committee noted a Resolution (Chapter III, Section 3) included in the report of the Second Session of the F.A.O. Latin American Commission for Forestry and Forest Products indicating the desirability "that European concerns be permanently informed of the possibilities offered by the Latin-American Continent", in anticipation of further developing markets for Latin-American forest products.

12. 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.

A. IMPORTS (incl. Boxboards and Timber Equivalent of Sawlogs)

IMPORTATIONS (Y compris les parties de caisse et les Grumes Exprimees en Sciages)

Principally Importing Countries	Imports - Importations		Imports Requirements 1950		Besoins d'importations 1951	Principaux Pays Importateurs
	1937	1949	Eff. demand as estimated in September 1949. Demande Eff. estimee en Septembre 1949	Eff. Demand revised in April 1950. Demande Eff. revisee en Avril 1950	Eff. Demand as estimated in April 1950. Demande Eff. estimee en Avril 1950	
1	2	3	4	5	6	
Belgium (275)	(i) 190.0	117.0	150.0	150.0	150.0	Belgique
Denmark	171.0	154.6	175.0	150.0	150.0	Danemark
France (475)	(i) 190.0	208.2	50.0	50.0	125.0	France
Germany Bizone	..	61.9	90.0	100.0	100.0	Allemagne: Bizone
" French Zone	..	..	)	)	)	" Zone-Francaise
" Russian Zone	..	..	..	..	..	" Zone-Russe
Total Western Germany	731.0	..	90.0			Total Allemagne Occidentale
Greece	70.0	50.9	80.0	(80.0)	(80.0)	Grèce
Hungary	192.0	..	(85.0)	(25.0)	(25.0)	Hongrie
Ireland	80.0	58.0	(50.0)	(50.0)	(50.0)	Irlande
Italy	312.0	169.4	171.0	220.0	(230.0)	Italie
Luxembourg	8.0	8.0	8.0	8.0	8.0	Luxembourg
Netherlands	374.0	351.1	350.0	350.0	350.0	Pays-Bas
Portugal	..	1.6	(5.0)	(5.0)	(5.0)	Portugal
Switzerland	41.0	32.5	35.0	25.0	25.0	Suisse
Turkey	5.0	25.0	(25.0)	(20.0)	(20.0)	Turqui
United Kingdom	2366.0	1102.5	1200.0	1050.0	1100.0	Royaume Uni
Sub-Total	4730.0	2340.7	2474.0	2283.0	2448.0	Sous Total
Egypt	98.0	..	(	(	(	Egypte
French North Africa	60.0	)	(	(	(	Afrique Du Nord Francaise
Iraq	14.0	)	((275.0)	((150.0)	((150.0)	Irak
Israel (iii)	54.0	)	(	(	(	Israel (iii)
Lebanon		(250.0)	(	(	(	Liban
Syria		)	(	(	(	Syrie
Other Importing Countries	(150.0)	)	(	(	(	Autres Pays Importateurs
Other Countries Normally Exporting	(200.0)	)	(200.0)	((100.0)	((100.0)	Autres Pays Normalement Exportateurs
Total A:	5306.0	2590.7	2949.0	2533.0	2698.0	Total A:

Remarks: (i) The average figure for imports in 1918-32 was 475.0 for France and 275.0 for Belgium.

(ii) January to August only

(iii) Palestine within its 1937 frontiers

General Remarks: Estimated figures are in brackets

.. = not available

Remarques: (i) La moyenne des importations pour la periode 1918-32 été de 475.0 pour la France, et 275.0 pour la Belgique

(ii) Janvier - Aout seulement

(iii) Palestine - Frontieres de 1937

Remarque Generale: Les chiffres estimes sont entre parentheses

.. = chiffres non disponibles

TABLE No. 2
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Exports of Sawm Softwood
(in thousands of standards)
B. (incl. Boxboards and Timber Equivalent of Sawlogs)

Exportations de Sciages Resineux
(en milliers de standards)

(Y compris les parties de caisse et les Grumes exprimées en sciages)

TABLEAU No. 2
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Page 10
Sixieme Session

Principally Exporting Countries	Exports - Exportations		Export Prospects				Previsions d'exportations		Principaux Pays Exportateurs
	1937	1949	1950		1951				
			Normal as estimated in September 1949 Estimées en Septembre 1949	Maximum	Normal revised in April 1950 revisées on Avril 1950	Maximum	Normal as estimated in April 1950 estimees en Avril 1950	Maximum	
1	2	3	4	5	6	7	8	9	
Austria	317.0	267.9	200.0	280.0	250	300	250	350	Autriche
Czechoslovakia	176.0	..	(25.0)	(45.0)	(25)	(25)	(25)	(25)	Tchécoslovaquie
Finland	1045.0	636.5	400.0	470.0	500	600	500	600	Finlande
France	..	83.4	(i) 300.0	(i) 300.0	100	120	10	20	France
Germany	Bizone	72.0	..	..	25	25	0	0	Allemagne: Bizone
	French Zone	..	(-)	(-)	..	..	..	..	Zone Française
	Russian Zone	..	..	..	..	..	..	..	Zone Russe
Total Germany	..	..	-	-	..	..	..	..	Total Allemagne
Norway	51.0	16.2	40.0	40.0	(35)	(35)	(35)	(35)	Norvège
Poland	334.0	39.0	60.0	60.0	(60)	(60)	(60)	(60)	Pologne
Portugal	..	15.0	(40.0)	(40.0)	(25)	(25)	(25)	(25)	Portugal
Rumania	353.0	25.0	(100.0)	(150.0)	(30)	(30)	(30)	(30)	Roumanie
Sweden	820.0	661.6	550.0	575.0	575	625	550	600	Suède
Yugoslavia	197.0	154.2	60.0	160.0	60	160	60	160	Yougoslavie
U.S.S.R.	1362.0	131.0	(180.0)	(300.0)	(250)	(300)	(300)	(300)	U.R.S.S.
Sub-total	4655.0	2101.8	1955.0	2420.0	1935	2305	1845	2205	Sous-Total
Canada	508.0	251.0	(ii) 300.0	(ii) 300.0	250	250	300	300	Canada
U.S.A.	110.0	..	(ii) 80.0	(ii) 150.0	75	150	75	150	U.S.A.
Other sources	-	..	(ii) (20.0)	(ii) (80.0)	100	100	100	100	Autres provenances
TOTAL	5273.0	2352.8	2355.0	2950.0	2360	2805	2320	2755	TOTAL

Remarks: (i) These figures are the result of the first estimates in respect of the total volume of wood available after the Landes Fires; they are subject to be revised later.
(ii) Only to Europe.

General Remark: Estimated figures are in brackets
.. = not available

Remarques: (i) 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.
(ii) Exportations vers l'Europe seulement.

Remarque Generale: Les chiffres estimés sont entre parenthèses.
.. = Chiffres non disponibles

FORECAST OF PRODUCTION EXPORTS AND IMPORTS OF PITPROPS FOR 1950 AND 1951
PREVISIONS DES PRODUCTIONS, EXPORTATIONS ET IMPORTATIONS DE BOIS DE MINES POUR L'ANNEE 1950 ET 1951

In thousands of cubic metres

En milliers de mètres cubes

COUNTRIES	Production 1949	Normal requirements in 1950 estimated in April 1950	Indigenous production in 1950 as estimated in April 1950	Effective imports in 1949	Estimated imports requirements for 1950 (Est. April 1950)	Effective exports in 1949	Estimated exports possibilities for 1950	1951				PAYS
		Besoins normaux en 1950, esti- mations faites en avril 1950	Production nationale en 1950 estimés en avril 1950	Importations effectives en 1949	Estimations des besoins d'importa- tions pour 1950 (Est. April 1950)	Exportations effectives en 1949	Estimations des possibi- lités d'ex- portations pour 1950	Normal requirements estimated in April 1950	Estimated indigenous production made in April 1950	Imports requirements estimated in April 1950	Exports possibilities estimated in April 1950	
1	2	3	4	5	6	7	8	9	10	11	12	
Austria	283	214	334	-	-	72	120	223	343	-	120	Autriche
Belgium	850	1,200	850	281	375	11	25	1,200	850	375	25	Belgique
Czechoslovakia	..	670	(670)	..	-	-	-	(670)	(670)	-	-	Tchécoslovaquie
Finland	1,134(1)	-	700	-	-	1,134	700	-	750	-	750	Finlande
France (x)	2,500	3,250	2,900	768	450	140	100	3,250	2,800	550	100	France (x)
Germany: Bizone	3,575	)	)	-	)	-	)	)	)	)	)	Allemagne: Bizone
French zone	..	3,630)	3,400)	-	530)	-	300)	3,700)	3,300)	700)	300)	Zone fran- caise
Western Germany Total	3,575(2)	3,630	3,400	-	530	-	300	3,700	3,300	700	300	Total Allem. Occidentale
Hungary	..	(150)	(100)	..	(50)	..	(-)	(150)	(100)	(50)	-	Hongrie
Ireland	9	(2)	(11)	-	-	12	(9)	(2)	(11)	-	(9)	Irlande
Italy	111	190	190	1	-	1	-	190	190	-	-	Italie
Luxembourg	90	25	60	5	10	52	65	20	60	10	50	Luxembourg
Netherlands	80	264	115	207	75	-	-	270	100	160	-	Pays-Bas
Norway	101	-	(80)	-	-	101	(80)	-	(80)	-	(80)	Norvège
Poland	..	(2,066)	(1,866)	..	(450)	(250)	(250)	(2,066)	(1,866)	(450)	(250)	Pologne
Portugal	212	40	(240)	-	-	219	(200)	40	(240)	(-)	(200)	Portugal
Sweden	750(1)	-	200(3)	-	-	660	(300)(3)	-	400	-	400	Suède
Switzerland	-	-	25	-	-	-	25	-	20	-	20	Suisse
Turkey	(71)	(203)	(71)	125	(132)	..	(-)	(203)	(71)	(132)	(-)	Turquie
United Kingdom	636	3,000	630	2,375	2,100	-	-	3,100	630	2,470	-	Royaume-Uni
U.S.S.R. (3)	..	..	(850)(4)	..	-	(150)	(1,100)(4)	..	(1,100)(4)	..	(1,100)	U.R.S.S.
Yugoslavia	..	..	175 (1)	..	..	189	175	..	175 (1)	-	175	Yougoslavie
TOTAL EUROPE	10,402	14,904	13,467	3,762	4,172	2,991	3,449	15,084	13,756	4,897	3,579	TOTAL EUROPE
Canada	710	-	(5)	-	-	710	300 (5)	-	300 (5)	-	300 (5)	Canada
U.S.A.	..	..	(5)	..	..	..	(6)	..	(6)	..	(6)	U.S.A.
Other countries	-	-	(132)	..	..	-	-	-	-	-	-	Autres pays
T O T A L	11,112	14,904	13,599	3,762	4,172	3,701	3,749	15,084	14,056	4,897	3,879	T O T A L
BALANCE	-	-	-1,305	-	-	-	-	-	-1,028	-	-	BALANCE

GENERAL REMARK: Estimated figures are in brackets.

SYMBOLS EMPLOYED: .. = Not available.
- = No production, stocks, exports, imports, etc.

FOOTNOTES:

- (1) Exports as Production
- (2) Excluding French Zone
- (3) Approximate figure, subject to contracts concluded immediately.
Estimated export 1950 includes quantity manufactured and sold
1949 but not yet lifted.
- (4) Estimated production for export.
- (5) See report E/ECE/TIM/29, Page 9, paragraph 8. Important quantities
can be made available against demand.
- (6) See report E/ECE/TIM/29, Page 9, paragraph 8.
- (x) Including the Saar.

REMARQUE GENERALE: Les chiffres estimés sont entre parenthèses

EXPLICATION DES SIGNES: .. = Chiffres non disponibles.
- = Pas de production, de stocks, d'exportations,
d'importations, etc.

NOTES:

- (1) Exportations comme production.
- (2) Non compris la Zone Française.
- (3) Chiffre approximatif, sous réserve de contrats conclus immédiatement.
Les exportations estimées pour 1950 comprennent les quantités façonnées
et vendues en 1949, mais pas encore expédiées.
- (4) Estimations de la production pour l'exportation.
- (5) Voir rapport E/ECE/TIM/29, page 9, paragraphe 8. Des quantités
importantes peuvent être fournies sur demande.
- (6) Voir rapport E/ECE/TIM/29, page 9, paragraphe 8.
- (x) Sarre incluse.