

UNITED NATIONS ECONOMIC AND SOCIAL COUNCIL



Distr.
RESTRICTED
E/ECE/TIM/60
23 October 1958
Original: ENGLISH

ECONOMIC COMMISSION FOR EUROPE

Timber Committee

Sixteenth Session

REPORT OF THE SIXTEENTH SESSION OF THE TIMBER COMMITTEE

13 to 17 October 1958

1. The Timber Committee held its sixteenth session in Geneva, from 13 to 17 October 1958. It was attended by delegates from: Austria, Belgium, Byelorussian SSR, Canada, Czechoslovakia, Denmark, Federal Republic of Germany, Finland, France, Hungary, Italy, Netherlands, Norway, Poland, Portugal, Romania, Spain, Sweden, Switzerland, USSR, Eastern Zone of Germany, United Kingdom, United States, Yugoslavia.

Also participating in the session were representatives of the International Labour Organisation and the International Confederation of Free Trade Unions.

A Secretariat member of the Organisation for European Economic Co-operation also attended at the invitation of the Secretariat. (For list of delegates, see TIM/Conf. Room Doc. No. 12).

2. Mr. Tuomioja, the Executive Secretary of ECE, in his introductory statement, drew attention to the particular importance attached this year to the Committee's review of its work programme. After referring to the resolution 664 (XXIV) of the Economic and Social Council, dealing with concentration on major activities, he advanced a number of suggestions for the Committee's consideration in adapting its work programme to comply with the Council resolution. The Committee then re-elected by acclamation Mr. F. M. du Vignaux (France) as Chairman and Mr. J. O. Söderhjelm (Finland) and Mr. J. Knothe (Poland) as Vice-Chairmen.

Mr. du Vignaux thanked the Committee for the honour again conferred upon him. In accepting re-election for the present session, he informed the Committee that he would be unable to continue in office beyond the current term. The Committee noted the Chairman's statement with regret, and record its appreciation of the incomparable services Mr. du Vignaux had rendered to European co-operation in the field of timber during his term of office.

On the suggestion of the Chairman, in order to expedite the work of the session, the Committee appointed Mr. G. Hampson (United Kingdom) as rapporteur on the market situation and outlook for pitprops.

3. Sawn Softwood

The Committee heard statements about the sawn softwood situation and outlook for 1958 and 1959 and filled in the worksheets attached to this report as Tables 1 and 2.

(a) Situation in 1958

Events in the European sawn softwood market in the course of 1958 have demonstrated the sensitivity of this market to general trends in the European economy. At the time of the Committee's 15th session, in October 1957 there was a good deal of uncertainty as to the extent to which the curbs then being applied to the economies of several European countries would affect the development of industrial and constructional activity. It was emphasized that the hope of continued stability was linked to a moderately optimistic assessment of general economic trends.

In fact, these hopes have not been realized. So far 1958 has not on the whole been a favourable year for the European timber market, though it should be noted that the weaker tendency manifest in 1958 did not apply to the whole of Europe, nor could it be described as a serious recession. While the setback was certainly pronounced, considered against the background of the relative stability which the market has now enjoyed for 5 years, in magnitude it cannot be compared with recessions which the market has known in earlier years.

With industrial activity in many sectors declining in Western Europe, and constructional programmes running in general somewhat lower than in the preceding year, a certain fall in consumption and demand was inevitable, though nowhere did this fall assume large proportions. Stocks in importing countries at the end of 1957 were high, especially having regard to the cost of stock-holding under tight credit conditions. These factors alone were sufficient to induce a very cautious approach to purchasing by the main importing countries. In addition, buyers were influenced by anticipation of price reductions and fears of the ultimate repercussions of the U.S. recession on the European economy: in the United Kingdom the release of the last batch of government-held stocks to the trade diminished the year's import requirements.

With purchasing slow, ample supplies on offer, and an eagerness to effect sales, important downward adjustments of prices occurred. These related mainly to lower grades, prices of top quality goods remaining relatively firm. It was some time, however, before price concessions stimulated buying, since in many cases importers held off buying in the expectation of further price falls.

Imports by European countries in 1958 (taking the average of the "Normal" and "Maximum" estimates) will probably now be some 80 thousand standards less than the average figure estimated by the Committee at its 15th session. Imports into Hungary, the Netherlands and the United Kingdom will fall somewhat short of the estimates made a year ago; these reductions are partly offset by the fact that imports into Germany, East and West, will be higher than was earlier forecast. The 1958 level of imports by European countries represents a substantial fall - some 550 thousand stds. - from the 1957 level.

Imports into the Middle East and North African countries normally supplied from European sources also fell slightly short of earlier expectations. Total imports on the European market are now expected to reach 3.68 million standards (again taking the average of "normal" and "maximum" estimates), 100 thousand stds. or 3 per cent less than the 3.78 estimated by the Committee a year ago and a figure which compares with actual 1957 imports of 4.19 million standards.

Thus, on the whole, European imports have fallen short, though only slightly short, of expectations, a substantial fall in import requirements for 1958 having been envisaged by the Committee at its fifteenth session. In contrast, the amount available for export from European sources have proved substantially greater than was estimated a year ago. Actual exports from Austria, Czechoslovakia, Finland and the USSR in 1958 are now likely to exceed earlier maximum estimates by over 200 thousand stds. In Austria weather hazards again made additional supplies of storm-felled timber available, while in Finland the devaluation combined with easier credit conditions stimulated log purchases, sawnwood production and exports. With supplies from Sweden and other countries coming close to earlier estimates, total supplies from European sources in 1958 are now estimated at 3.67 million stds., as compared with 3.45 million estimated a year ago. Both these figures are "maximum" estimates, since recent years have shown that export realizations are usually better reflected by these estimates. Supplies from Canada have not increased to the extent expected, since the fall in transatlantic freights was soon offset by the fall in European prices. Total supplies from all sources to the European market are thus now likely to reach 4.1 million stds.

The tables show an excess of goods available for export on the European market of the order of 300 thousand stds. In other words, unless end-of-season purchases prove to be higher than is at present expected, it seems certain that there will be a substantial increase of stocks in some of the principal exporting countries. This would permit a readjustment of stocks to their normal levels and influence production plans for 1959.

(b) Outlook for 1959

Once again prospects for the coming year depend largely on an assessment of general trends in the European economy. Certain favourable signs are evident. The upturn in U.S. business since the second quarter of the year bids fair to continue, and to some extent this will remove one of the clouds from the European horizon. In many European countries measures have been taken to stimulate economic activity - easier credit, bank rate reductions, etc., though these may not have an immediate effect on industrial production and construction programmes. There are some signs of improving timber consumption. Finally, 1959 is likely to open with stocks in importing countries which, while adequate, are no longer excessive - either in quantitative or financial terms. But while there are evident grounds for optimism - and these are reflected in exporters' estimates for the coming year - it is perhaps understandable that, after the experience of the last year, importers are anxious not to over-estimate the extent of the expected increase in demand.

Present estimates of import requirements of European countries in 1959 show an increase of some 200 thousand stds. over 1958. This rests on expected increases of 100 thousand stds. in the United Kingdom, 40 thousand in Spain, and small increases in France, the Netherlands and the Eastern Zone of Germany. With Mediterranean and other overseas requirements remaining unchanged, total import needs of the European market (taking the mid-point of the "normal" and "maximum" estimates) will amount to 3.87 million stds.

Maximum supplies from European sources in 1959, show very little change from 1958, though minor variations in availabilities from the several principal exporters are envisaged. Overseas supplies may run somewhat higher than in 1958, giving a total supply to the European market in 1959 from 3.87 to 4.2 million stds. This would indicate that goods available for export in 1959

would exceed demand by some 150 to 200 thousand stds. While this latter figure corresponds only to some 4 or 5 per cent of total supplies, experience suggests that the margin is substantially greater than that recorded at the corresponding stage of estimate in years when the market was truly in balance or when shortages were evident; the margin must therefore be regarded as significant.

Under these circumstances particular importance attaches to the outcome of the 1958 campaign. Many delegates stressed the importance of avoiding further instabilities in the market, with consequent price fluctuations. As yet cheaper sawnwood has hardly had time to markedly stimulate timber consumption or to halt the trend towards substitution though there is a fair possibility that it will do so in due course. The Committee reaffirmed its view that excessive price fluctuations are detrimental to the interests of producers and importers alike.

The Committee concluded that there were good prospects of improved consumption, increased import requirements and a higher level of trade in 1959, even though the market may open somewhat later than usual. Given favourable developments in the European economy, the fairly cautious estimate of import requirements might be exceeded. Adequate supplies will be available to meet any foreseeable increase in demand, but it is perhaps more important than ever this year that production plans, and selling programmes, be carefully matched to the evolution of demand if overproduction, with consequent further price fluctuations, is to be avoided and the setback of 1958 satisfactorily overcome.

(c) Future procedure

A suggestion by the delegate of Switzerland that a short review of general economic trends in Europe would form a useful introduction to the Committee's discussion of the market found general support. The Secretariat announced that the Executive Secretary, in order to meet the Committee's wishes, would make arrangements at future sessions for a brief authoritative statement on current economic and financial trends and policies to be presented to the Committee before the market discussion is engaged.

4. European Hardwood Situation

(a) Recommendations by the experts

The final version of a special report on the European Hardwood Market (TIM/123 Rev.1) prepared by Mr. Hans (Switzerland), Mr. Bryan Latham (United Kingdom) and Mr. Madre (France) was submitted to the Committee, along with recommendations emerging from the report concerning the Committee's future procedure on hardwoods (TIM/142) and a Secretariat Note commenting on these recommendations (TIM/143). On the basis of these documents and of statements made by Mr. Hans, Mr. Madre and by the Secretariat, members of the Committee expressed their views on future procedure in this matter. It was agreed to accept the experts' recommendation that regular attention be given to the hardwood market and that the time devoted to such a review be commensurate with the importance of the subject. The Committee accordingly agreed to review the hardwood market regularly and requested that a consultation of experts from interested governments be convened by FAO and ECE during 1959 to lay down and define the statistical and other information to be assembled as a basis for the Committee's annual market review.

(b) The European hardwood market in 1958 and prospects for 1959

The Committee heard statements about the hardwood situation and outlook for 1958 and 1959.

Situation in 1958

Overall European hardwood production during 1958 will probably be slightly lower than in 1957, declines in most western countries being only partly offset by increases in Romania and Yugoslavia. It is the poor demand for medium and low quality beech in Europe that is mainly responsible for the overall production fall.

The demand for both good grade temperate logs and for tropical logs has been maintained during 1958. Log imports from tropical sources have again increased and, as in the past, have found their way chiefly to the plywood and veneer industry.

There has been a decline in both imports and exports of temperate sawn hardwoods and, though to a lesser extent, in imports of sawn tropical woods.

The fall in French sawn hardwood exports was particularly noticeable during the first semester of 1958. Some South-Eastern countries report the fall in sawn export to have been partly compensated by increases in exports of hardwood manufactures, including flooring.

On balance during 1958, taking into account both logs and sawnwood, net European imports will probably be slightly higher than in 1957.

Prices for good grade temperate logs have on the whole been maintained at the level prevailing in 1957. However the increased volume of tropical logs has contributed to a fall in the prices of medium and low grade temperate logs, particularly beech. It seems that this has been most marked in France, where prices of small sized beech sawlogs have in some cases almost dropped to the level of pulpwood prices. Prices of temperate sawnwood have remained stable on the whole, though several countries reported price falls for sawn beech.

European consumption of sawn hardwood and hardwood sleepers during 1958 will probably fall slightly short of the 1957 level. However, with plywood production in 1958 again increasing, and absorbing many of the tropical and good quality temperate logs, and with more hardwood being pulped, total consumption of hardwood will probably increase.

Outlook for 1959

The recent easing of credit conditions and hire purchase terms should favourably influence the hardwood market in 1959. Both building and furniture production are expected to show increases. Sawn hardwood prospects for 1959 appear to be more favourable than in 1958 and the demand for good grade temperate and tropical hardwood logs for the plywood industry is likely to be as keen as ever. However, prospects for medium and low grade beech logs are not encouraging.

On balance, 1959 should show a net advance in hardwood consumption and trade and the likelihood is, that as in previous years, this will be met largely by increased imports of tropical logs into Western Europe.

5. Small-sized roundwood

(a) Pitprops

Since the 15th session of the Committee there have been important changes in

the pitprop situation. With few exceptions the pitprop requirements of importing countries have fallen. Consumption declined and several countries (notably the United Kingdom and the Netherlands) have reduced their stocks. The result is that total import requirements for 1958 are now likely to amount to some 20 per cent less than the figure estimated a year ago.

The stability noted at the last session has thus been disturbed and even though there has been some consequential reduction in export availabilities, the latest figures still show an estimated excess of export availabilities over import requirements this year of nearly 700,000 solid cubic meters, or over 20 per cent.

In these circumstances it is not surprising that the pitprop market, after a long period of stability, has become weaker and that export prices have fallen by as much as 15 - 20 per cent in some cases.

In 1959 consumption is expected to fall further in many importing countries. On the other hand substantial stock reductions such as have occurred in 1958 seem unlikely and import requirements next year are therefore expected to be a little higher than in 1958 (3,240,000 solid cubic meters against 3,081,000 solid cubic meters).

With the fall-off in purchases and prices lower, supplying countries have found it difficult to estimate export availabilities for 1959. Yet the figures before the Committee again show an apparent excess of export availabilities over requirements next year of some 400,000 solid cubic meters. Provided contracts are made in due time there should be no problem to cover requirements. Otherwise the needed goods may not be available.

The fall in pitprop consumption in importing countries is due in part to lower coal production, but the main factor again appears to be a further reduction in timber usage in relation to coal output. With little sign of any attempt to develop new kinds of mine supports based upon wood to compete with the technical and other advantages afforded by modern steel and other support structures this trend away from timber usage in coal mines in these countries seems likely to continue.

Developments during the past year, and particularly the fall in prices in the face of higher labour costs, must be a serious discouragement to many

producers. Though some substantial business has been concluded already for 1959 at low prices, the purchasing campaign is not yet under way. So far there is little sign of recovery in the market.

(b) Pulpwood

European requirements of wood raw materials for pulping continued to rise in 1958, the main increase appearing in the USSR. Figures presented to the Committee indicated that a further, though somewhat smaller, increase may be expected in 1959, when a fall in Sweden's requirements of over 1 million cubic meters will be more than offset by increases in Finland and several other countries. With few exceptions this increase in requirements is being met by indigenous supplies. The Committee noted that this development had been assisted by further substantial progress in the utilization of wood residues and of broadleaved pulpwood. By 1959 it is estimated that for Europe as a whole wood residues will satisfy some 10 per cent, and broadleaved species some 8 per cent, of total wood requirements for pulping; in other words, nearly a fifth of European needs will be met by these categories.

Reports by various delegates showed that a weaker market in pulpwood had developed since the last session and there had been considerable reductions in prices. The fall-off in purchases was evident in the revised estimates of import requirements for 1958 which showed a reduction of nearly 800,000 cu.m. or about 12 per cent as compared with the estimates made a year ago. In view of the uncertain state of the pulpwood market estimates of export availabilities were modest and in fact showed an apparent deficit of 700,000 cu.m. The current state of the market, however, makes it clear that this apparent deficit is largely due to the inadequacies of the statistical data. Experience has shown that a statistical deficiency of a million cu.m. has usually corresponded to de facto balance. In fact in recent years producers have not met with difficulties in bringing forward sufficient supplies to meet increases in demand.

For 1959, the figures before the Committee again showed an apparent deficit - of 800,000 cu.m. This is not large, considering the total volume of pulpwood production. The European trade in pulpwood represents

considerably less than 10 per cent of the total consumption, as against some 30 to 40 per cent in the case of sawn softwood.

Having regard to these facts, and bearing in mind the traditional elasticity in pulpwood supplies and the apparent surplus revealed in the Committee's review of prospects for pitprops, the Committee concluded that pulpwood supplies in the coming year should be sufficient to cover requirements. As regards the long term outlook for pulpwood export availabilities it has to be borne in mind that a substantial expansion of pulping capacity is contemplated.

6. Timber Bulletin for Europe

On the basis of Secretariat notes TIM/136 and TIM/138 the Committee discussed the contents and format of the Timber Bulletin, and ways and means of improving the service it rendered to its readers. All delegates approved the decision to publish separately the country reports and registered satisfaction with the speeding up of the publication of statistics which this step had made possible. Several delegates expressed the hope that means would be found of translating the country reports, without sacrificing the topicality of the reports.

The Secretariat explained the effect of delays encountered in the receipt of the basic statistics, and several delegates gave an account of the difficulties which prevented their countries from submitting all the information required in due time. It was the unanimous view of the Committee that publication within 100 days of the close of each statistical period should be maintained. Accordingly it was agreed that:

- (a) the fifty-day deadline should be preserved and all available information, including production and total trade figures should be submitted by that date;
- (b) information made available by countries unable to meet completely the original deadline and reaching the Secretariat within the next fifteen days would be included in the proof stage as far as possible; and
- (c) details on trade by origin and destination received after 65 days would be included in the subsequent issue of the Bulletin.

A suggestion that the Bulletin might be published at less frequent intervals found no support, and it was agreed that quarterly publication should continue.

The Secretariat announced that it was conducting a review of the price series included in both the Bulletin and the annual "Timber Price Statistics", and certain changes were contemplated which should improve the contents of both these publications.

The Secretariat undertook to give careful consideration to various suggestions and criticisms as to the contents and presentation of the Bulletin submitted by delegates in the course of the discussion.

7. Joint FAO/ECE Committee on Forest Working Techniques and Training of Forest Workers (in collaboration with I.L.O.)

The Timber Committee took note of the report on the work which had been carried out since October 1957 by the Joint FAO/ECE Committee on Forest Working Techniques and Training of Forest Workers (TIM/140); this was introduced by the Chairman of the Joint Committee, Mr. E.G. Richards (United Kingdom).

The Committee recorded its appreciation and thanks for the invitation of the Government of Norway to hold the third session of the Joint Committee in that country from 1 - 15 June 1959 (including study tour).

In line with resolution 664 (XXIV) of the Economic and Social Council concerning the concentration of activities of the United Nations and Specialized Agencies in the Economic, Social and Human Rights field, and following the suggestions made by the Executive Secretary in his opening statement, the Timber Committee felt that the work of the Joint Committee's Study Groups might be adapted so as to place greater emphasis on major projects. It was therefore recommended that the Joint Committee, at its third session, review its programme of work accordingly and consider the simplification of its organizational structure.

The hope was expressed that the USA and Canada would participate more actively in the work of the Joint Committee.

The Committee recorded its appreciation for the continuing collaboration of the I.L.O. in the work of the Joint Committee, which has now found expression in the new title of the Committee. It paid tribute to the I.L.O., notably through its Fellowship Scheme, and to the joint sponsorship, together with ECE and FAO, of training courses and work in the field of accident prevention.

The Committee expressed its great satisfaction with the work accomplished by the Joint Committee.

It was pointed out that the present practice in regard to the Joint Committee's publications was unsatisfactory; the high value of these expert technical studies was decreased by delays in translation and publication. The Timber Committee requested the Secretariat to attempt to find a solution to this problem.

8. Joint Working Party on Forest and Forest Products Statistics

The Chairman of the Joint Working Party, Mr. J. Keller (Switzerland) reported that in preparation for the third session of the Joint Working Party a small expert group had been convened in Geneva in April 1958 to consider utilization and end-use statistics. The expert group, whose conclusions will be examined by the Working Party at its next session in March 1959, had recommended priorities in the collection of end-use statistics both by consuming sectors and by wood products utilized. In response to the request of the expert group to all participating countries, reports on the techniques of collection used for statistics of wood consumed by manufacturing industries had already been received by the Secretariat from Austria, Czechoslovakia, Switzerland and the United Kingdom. Special reports on the techniques of collecting statistics of wood utilization in the agricultural sector have been received from Finland and the USSR.

The Committee, expressing its satisfaction with the work accomplished, hoped that countries which had not yet replied to the requests of the expert group for reports on the techniques of collecting statistics of wood utilization would quickly provide the Secretariat with that information.

In the course of the ensuing discussion, the following suggestions were submitted for consideration by the Working Party at its next session: that particular attention be given to the possibility of using sampling methods in collecting end-use statistics; that high priority be given to statistics of the utilization of small-sized roundwood and to a review of forest products conversion factors; and that consideration be given to the problem of improving the presentation of estimates of import requirements and export availabilities for pulpwood. The Committee also invited the Working Party to suggest procedures for securing early implementation of its recommendations by countries that have accepted those recommendations.

The Chairman of the Joint Working Party, replying to the discussion, undertook to transmit these suggestions to the Working Party.

9. International Board Consultation, 1957

The Secretariat announced that the final report of the International Board Consultation had now been distributed in English, and that French, Spanish and Russian translations were in preparation. The background papers submitted to the Conference will be published, in the original language only, in six mimeographed volumes by the end of the year.

The Committee considered how useful results achieved by the Consultation could best be followed up. Opinions were divided on the desirability of establishing permanent machinery within the framework of ECE to deal with the economic aspects of the particle board and fibre board industries, but there was general agreement that a further Consultation was desirable in view of the rapid economic and technical progress in these industries.

It was explained that, on both technical and budgetary grounds, the organization of a further International Consultation in 1959, as requested by several delegates, was out of the question. Provided FAO agrees to include a Board Consultation in its work programme such a meeting might be contemplated in 1962/63. The Committee noted that the World Forestry Congress to be held in Seattle in 1960 would provide an opportunity of considering the implications of these industries for integrated forest operations and for forest policy.

The Committee requested the Executive Secretary of ECE to consult with the Director General of FAO with a view to organising a second International Board Consultation, along the lines of that held in 1957, but perhaps on a more limited scale, as soon as possible. It was understood that in order to render such a Consultation useful all participating countries would undertake to provide all necessary and relevant information.

Pending a further International Consultation, the Committee expressed the hope that the FAO and ECE Secretariats would continue to follow closely economic and technical trends in the board industries and disseminate information concerning these industries in its regular publications.

A suggestion was made that the Secretariat explore the possibilities of obtaining financial support for work in this field from industry.

10. Trends in the Utilization of Wood and its Products

(a) Sector Study on Packaging

The Secretariat reported that an ad hoc Group of Experts had been convened in May 1958 in Geneva to advise the Secretariat on the scope and methodology of the Sector Study on Packaging to which previous sessions of the Committee had asked the Secretariat to give high priority. The Expert Group had prepared an outline for the study, and the Secretariat had dispatched to countries questionnaires drafted in accordance with the recommendations of the experts.

The Secretariat drew the attention of delegates to the fact that a study of this sector of wood utilization presented more difficulties than studies of any other sector on account of the scarcity of internationally available published data, and asked members of the Committee to make every effort to ensure that early and adequate responses to the questionnaires were forthcoming from their countries, in order that the Secretariat might be provided with a factual basis which would enable them to complete the study in the course of 1959.

(b) Sector Study on Wooden Sleepers

A sector study on trends in the utilization of wood for railway sleepers, prepared by Mr. A. Terrouin (France) on the basis of material contained in replies to a questionnaire distributed by the International Union of Railways at the request of the Secretariat, was introduced by the author. The Committee expressed its appreciation of the valuable indications for governments, timber industry and trade contained in this study, which analysed information received from the railway administrations of 9 countries viz: Austria, Belgium, Denmark, Federal Republic of Germany, France, Italy, Netherlands, Sweden and Switzerland.

Since the present study is based on data drawn from only 9 countries, the Executive Secretary was invited to seek corresponding data from the railway administrations of countries not included in the original report with a view to preparing an up-to-date and comprehensive final version of this sector study.

In view of the significant trends revealed, the Committee requested the Secretariat to examine the possibility of submitting to the Committee from time to time short progress reports drawing attention to new developments which might affect wood utilization.

11. The Utilization of Wood and Wood Waste

The Committee approved the report of the Ad Hoc Group of Experts on Wood Utilization (TIM/UT/3). Delegates commented favourably on the findings of the Group and stressed the importance of undertaking work in this field. In accordance with the recommendations of the Group, it was decided to give priority in the Programme of Work to:

- i. industrial utilization of small-sized roundwood and fuelwood;
 - ii. utilization of timber industry waste;
 - iii. search for new outlets for certain non-coniferous timber species.
- (see also para. 15 below).

It was further decided that, all the work on utilization should be carried out with the help of Government experts and rapporteurs. Starting with such "pilot" groups this might facilitate the subsequent expansion of the work towards a more permanent joint ECE/FAO body.

The Chairman of the Joint FAO/ECE Committee on Forest Working Techniques and Training of Forest Workers pointed out that certain wood waste problems were already being considered by that body; the co-ordination of the work undertaken by the various Groups was therefore necessary. The Committee noted the action which the Secretariat had taken in consulting governments on the elaboration of country studies on wood waste (TIM/153).

12. Proposal of the USSR for a draft all-European agreement on scientific, technical and economic collaboration in the field of logging and woodworking

On the suggestion of the delegate of the USSR the Committee decided to postpone consideration of this item to its next session.

13. Decisions and discussions of the 13th session of the Economic Commission for Europe relevant to the work of the Committee

Under this item the Committee considered two Secretariat notes: one, (TIM/145), summarising and commenting upon the discussions and decisions of the 13th Session of the Commission which have a bearing on the work of the Committee; and the second (TIM/141), containing the Executive Secretary's assessment undertaken pursuant to Commission Resolution 2 (XIII), of the extent to which existing international bibliographies and selected lists of documentary films meet documentation requirements in the field coming within the competence of ECE. The Committee noted the Secretariat's conclusions that existing

bibliographical facilities appear to be adequate. Nevertheless, the opinion was voiced that the Committee's subsidiary bodies should consider the possibility of issuing carefully selected and specialized bibliographies and lists of documentary films in the manner in which it had already been satisfactorily done under the auspices of the Joint FAO/ECE Committee on Forest Working Techniques and Training of Forest Workers; such a service should not entail any substantial outlays.

In connexion with Commission Resolution 3 (XIII) on the further development of contacts, the delegate of the USA drew attention to the World Forestry Congress scheduled to take place at Seattle in August/September 1960, the USA acting as host. He expressed the hope that as many members of the Committee as possible would participate in that important gathering which will consider problems of wood utilization and integrated forest operations as well as silvicultural problems.

The delegate of the USSR stated that in line with the Executive Secretary's suggestions more opportunities for reciprocal study tours should be provided within the Committee's framework and indicated that the Soviet Government considers favourably the possibility of inviting timber experts to visit the USSR.

The Committee invited Governments to inform the Secretariat by 1 January 1959 whether they would be prepared to arrange for such study tours, it being understood that the cost of such visits would be borne by the participants. On the basis of that information the Secretariat would endeavour to draw up a long-term plan of visits and study tours.

With respect to Commission Resolution 4 (XIII) concerning plastics and synthetic and artificial fibres, it was recognized that in due course the need to consider the uses of wood as a raw material for synthetic materials would arise in connexion with the work undertaken in the field of wood utilization.

With respect to Commission Resolution 9 (XIII) the hope was expressed that the Committee would in future seek to intensify co-operation with other regional economic Commissions, particularly by way of facilitating study tours of timber specialists from countries of other regions in Europe.

14. Special import/export problems

Upon the request of certain delegations, small meetings to discuss special import/export problems among the countries directly interested (Austria, France, Italy, Romania, Spain, USSR) were arranged. The Director of the Timber Division was kept informed of the general outcome of these conversations and was able to advise the Committee that satisfactory progress had been made.

15. Programme of Work for 1959

On the basis of the Secretariat proposals contained in document TIM/146, proposal drawn up in the light of Economic and Social Council resolution 664 (XXIV) and Commission resolution 13 (XIII), a thorough exchange of views took place about the programme of work to be undertaken during 1959. The Committee agreed that the basic projects listed in paragraph 4 of that document, i.e. the annual reviews of the market for softwoods and small-sized wood, the preparation of quarterly statistics and bulletins, the compilation of other information to support these reviews and the activities of the Joint FAO/ECE Committee on Forest Working Techniques and Training of Forest Workers and the Joint Working Party on Statistics, should continue to constitute the major tasks of the Secretariat. In addition, it decided to streamline the programme and achieve concentration by attributing for 1959 the highest priority to the following special subjects among those listed in paragraph 5 of document TIM/146.

1. Periodic review of the hardwood market.

An ad hoc Secretariat Consultation with experts from interested governments should be convened by FAO and ECE during 1959 to lay down and define the statistical and other information to be assembled as a basis for the Committee's annual market review.

2. Sector studies on packaging and sleepers.

3. Wood utilization studies on:

Industrial utilization of small-sized roundwood and fuelwood;

Utilization of timber industry waste;

Search for new outlets for certain non-coniferous timber species.

In order to initiate the above-mentioned wood utilization studies, the Secretariat will convene during 1959 a consultation of selected experts and rapporteurs to be made available by interested governments. The experts' first task will be to establish an outline and a working method for the study of the industrial utilization of small-sized roundwood and fuelwood. The Secretariat will explore with these experts the advisability of combining this study with the investigation of new outlets for certain non-coniferous timber species. Due attention should also be paid to co-ordinating this investigation with various studies now being undertaken by the Joint FAO/ECE Committee on Forest Working Techniques and Training of Forest Workers and its study groups. The hope was

further expressed by the Committee that after getting this project under way, the Secretariat would attempt to organize during 1959 a similar consultation for the purpose of preparing an outline and defining working methods with regard to the utilization of timber industry waste.

It was understood that these projects could be undertaken only if government experts made available for this purpose not only assembled material from their respective countries for these studies, but also appointed among themselves one or several rapporteurs to summarize and write up the conclusions.

The priorities indicated above have been incorporated in the programme of work for 1959 presented in the usual format, and the text as amended is contained in Annex I of this report.

The Committee expressed its keen disappointment of the delays experienced in the translation and publication of documents, and requested the Executive Secretary to take all priority steps to speed up the translation and publication of all documents relating to the Committee's priority projects.

16. Appraisal of the scope and trend of the work programme of the Timber Committee 1959-1964

Arising from Resolution 665 (XXIV) of the Economic and Social Council, which requires the Secretary-General to make an appraisal of the scope, trend and cost of the United Nations' programme in the economic, social and human rights field, the Committee reviewed the Secretariat's draft of its long-term programme.

The Committee endorsed the Secretariat Note in general terms. In the course of the discussions the following points were made:

- | | |
|-----------------------------|---|
| (a) Para. 2, II: | this statement should reflect more accurately the influence which the Committee is able to bring to bear on market stability. |
| (b) page 3; pitprops: | the formulation should make clear that the attention devoted to any particular commodity at a given time will depend on the evolution of the market. |
| (c) Technical improvements: | Certain references to work in the technical field (para. 10, lines 14-15; para. 11, lines 5-6; para. 12, lines 4-5) should be strengthened in line with the views expressed by the Committee on priorities. |

(d) Publications:

Attention should be drawn to the need to eliminate delays in the translation and publication of documents arising from the Committee's work on its priority projects.

The Secretariat undertook to give due consideration to these suggestions in its further work on the appraisal.

18. Other business

The Committee referred to its next session consideration of a request from the European Confederation of Woodworking Industries that a representative of the Confederation be allowed to attend meetings of the Committee as observer.

The Committee requested its Chairman in consultation with the Vice-Chairmen and the Secretariat to prepare its annual report for submission on the Committee's behalf to the 14th Session of the Commission.

19. Date and place of next meeting

It was agreed that the next session of the Timber Committee should be held in Geneva at a date to be decided by its officers in consultation with the Secretariat.

IMPORTS OF SAWN SOFTWOOD
(Incl. boxboards)

E/ECE/TIM/60
Annex I
IMPORTATIONS DE SCIAGES RESINEUX
(Y compris les planches de caisserie)

TABLE No. 1

In thousands of standards

En milliers de standards

TABLEAU No. 1

Principal Importing Countries	1937 (a)	1957	January- June 1958 Janvier- juin 1958	Imports requirements in : Besoins d'importations en :								Principaux pays importateurs		
				1957		1958		1958		1959				
				Estimates revised in Oct. 1957 Estimations révisées en oct. 1957		Estimates made in Oct. 1957 Estimations faites en oct. 1957		Estimates revised in Oct. 1958 Estimations révisées en oct. 1958		Estimates made in Oct. 1958 Estimations faites en oct. 1958				
				Normal	Maximum	Normal	Maximum	Normal	Maximum	Normal	Maximum			
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Belgium-Luxembourg	175	142	31	115	120	110	120	120	125	110	120			Belgique-Luxembourg
Czechoslovakia	1	65	19	40	42	35	40	37	40	37	40			Tchécoslovaquie
Denmark	130	123	38	100*	100*	100*	100*	80*	90*	100*	110*			Danemark
France	218(b)	176	66	125	135	120	135	135	145	130	160			France
Germany, Western	{ 494	600	237	510	560	480	530	520	550	490	540			Allemagne occidentale
Germany, Eastern		123	46	105	105	100	107	125	125	140	140			Allemagne orientale
Greece	62(c)	53	21*	40*	50*	40*	50*	40*	50*	40*	50*			Grèce
Hungary	125	130	51	125	128	125	130	110	112	115	120			Hongrie
Ireland	76	26	20	40*	50*	40*	50*	40*	50*	40*	50*			Irlande
Italy	200	390	189	370	390	360	380	370	380	350	370			Italie
Netherlands	339	422	89	385	390	360	370	320	320	350	350			Pays-Bas
Spain	1	12	9	26	30	30	35	25	30	45	70			Espagne
Switzerland	10	30	11	25	30	20	30	20	25	20	30			Suisse
Turkey	2	14	2	20*	30*	20*	30*	10*	20*	15*	25*			Turquie
United Kingdom	2 490	1 458	427	1 400	1 425	1 250	1 350	1 225	1 275	1 325	1 375			Royaume-Uni
U.S.S.R.	-	89	41	50	50	50	50	39	39	50	50			U.R.S.S.
Other European countries	2(d)	12(g)	5*	10*	15*	10*	15*	10*	15*	10*	15*			Autres pays européens
Other countries normally exporting	58(e)	37(h)	15*	40*	50*	40*	50*	40*	50*	40*	50*			Autres pays normale- ment exportateurs
<u>SUB-TOTAL A</u>	4 433	3 902	1 317	3 526	3 700	3 290	3 572	3 266	3 441	3 407	3 665			<u>SOUS-TOTAL A</u>
U.A.R. (Egypt)	94(c)	36	17	55*	65*	50*	70*	50*	60*	50*	60*			R.A.U. (Egypte)
Algeria	{ 40	45(i)	..	)	)	)	)	45	55	45	55			Algérie
Morocco		17	..	)	)	)	)	15*	15*	15*	15*			Maroc
Tunisia	{ 54(f)	8(i)	..	)	)	)	)	)	)	)	)			Tunisie
Israel		53(j)	..	)	)	)	)	45*	55*	45*	55*			Israël
Lebanon	{ 7	14	..	)	)	)	)	)	)	)	)			Liban
U.A.R. (Syria)		7	..	)	)	)	)	30*	40*	30*	40*			R.A.U. (Syrie)
Other Middle-Eastern and North African countries	..	..	..	)	)	)	)	)	)	)	)			Autres pays du Moyen- Orient et de l'Afrique du Nord
<u>SUB-TOTAL B</u>	195	180	..	210	245	205	250	185	225	185	225			<u>SOUS-TOTAL B</u>
Other overseas countries not mentioned above	..	110(i)	..	120*(k)	130*(k)	120*(k)	130*(k)	120*	130*	120*	130*			Autres pays d'outre- mer non mentionnés ci-dessus
GRAND TOTAL	4 628	4 192	..	3 856	4 075	3 615	3 952	3 571	3 796	3 712	4 020			TOTAL GENERAL

- SEE OVER -

- NOTES AU VERSO -

TABLE 1 (continued)

* = Estimated figure
.. = Not available
- = Nil or less than half a unit

- (a) Source : European Timber Statistics 1913-1950
- (b) Includes some quantities of sawn hardwood.
- (c) Includes sawn hardwood.
- (d) Portugal.
- (e) Austria - Finland - Norway - Poland - Rumania - Sweden - Yugoslavia.
- (f) Palestine within its 1937 frontiers, includes sleepers.
- (g) Iceland and Portugal.
- (h) Austria, Bulgaria, Norway, Poland, Rumania, Sweden.
- (i) Export figures from countries of Western Europe.
- (j) Includes sleepers.
- (k) Imports from Europe.

TABLEAU No 1 (suite)

* = Donnée estimée
.. = Non disponible
- = Néant ou moins d'une demi-unité

- (a) Source : Statistiques européennes du bois, 1913-1950.
- (b) Y compris certaines quantités de sciages feuillus.
- (c) Y compris les sciages feuillus.
- (d) Portugal.
- (e) Autriche - Finlande - Norvège - Pologne - Roumanie - Suède - Yougoslavie.
- (f) Palestine, frontière de 1937, y compris les traverses.
- (g) Islande et Portugal.
- (h) Autriche, Bulgarie, Norvège, Pologne, Roumanie, Suède.
- (i) Exportations indiquées par les pays d'Europe occidentale.
- (j) Y compris les traverses.
- (k) Importations en provenance d'Europe.

TABLE No. 2

EXPORTS OF SAWN SOFTWOOD
(Incl. boxboards)

In thousands of standards

EXPORTATIONS DE SCIAGES RESINEUX
(Y compris les planches de caisserie)

En milliers de standards

TABLEAU No. 2

Principal Exporting Countries	1937 (a)	1957	January- June 1958 Janvier- juin 1958	Exports prospects for : Prévisions d'exportation pour :								Principaux pays exportateurs		
				1957		1958		1958		1959				
				Estimates revised in Oct. 1957 Estimations révisées en oct. 1957		Estimates made in Oct. 1957 Estimations faites en oct. 1957		Estimates revised in Oct. 1958 Estimations révisées en oct. 1958		Estimates made in Oct. 1958 Estimations faites en oct. 1958				
				Normal	Maximum	Normal	Maximum	Normal	Maximum	Normal	Maximum			
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Austria	311	697	321	640	695	610	650	640	670	620	660			Autriche
Czechoslovakia	108	122	57	120	125	90	100	110	120	90	105			Tchécoslovaquie
Finland	1 020	704	198	650	680	575	625	725	750	725	775			Finlande
France	15 ^(b)	67	31	75	90	75	90	60	70	70	90			France
Norway	40	40	20	35	40	35	40	40	45	40	50			Norvège
Poland	316	64	18	55	58	50	60	60	70	60	65			Pologne
Portugal	7	64	33	62	67	60	65	63	65	60	62			Portugal
Rumania	292	192	90*	200	200	150	160	150	170	140*	160*			Roumanie
Sweden	876	1 096	324	950	1 000	850	900	850	900	850	900			Suède
Yugoslavia	199	54	20	60	65	50	55	50	53	48	50			Yougoslavie
U.S.S.R.	1 292 ^(c)	736	195	700	700	700	700	750	760	760	780			U.R.S.S.
<u>SUB-TOTAL A</u>	4 476	3 836	1 307	3 547	3 720	3 245	3 445	3 498	3 673	3 463	3 697			<u>SOUS-TOTAL A</u>
Canada ^(d)	499 ^(e)	263 ^(g)	131 ⁽ⁱ⁾	225	230	275	380	250	265	275	325			Canada ^(d)
United States ^(d)	111 ^(f)	42 ^(h)	..	50	80	50	80	50*	80*	50*	80*			Etats-Unis ^(d)
Other sources ^(d)	..	..	..	80*	90*	80*	100*	80*	90*	80*	100*			Autres provenances ^(d)
<u>TOTAL</u>	5 086	4 141	..	3 902	4 120	3 650	3 925	3 878	4 108	3 868	4 202			<u>TOTAL</u>
<u>IMPORTS</u>				3 856	4 075	3 615	3 952	3 571	3 796	3 712	4 020			<u>IMPORTATIONS</u>
<u>BALANCE</u>				+ 46	+ 45	+ 35	- 27	+ 307	+ 312	+ 156	+ 182			<u>BALANCE</u>

- SEE OVER -

- NOTES AU VERSO -

* = Estimated figure.
 .. = Not available.
 - = Nil or less than half a unit.

* = Donnée estimée.
 .. = Non disponible.
 - = Néant ou moins d'une demi-unité.

TABLE 2 (continued)

- (a) Source : European Timber Statistics 1913 - 1950.
- (b) Includes some quantities of sawn hardwood.
- (c) Includes the Baltic States.
- (d) To Europe only.
- (e) Excludes boxboards.
- (f) Includes sleepers.
- (g) Total exports : 1877
- (h) Total exports : 311.
- (i) Total exports : 881.

TABLEAU No. 2 (suite)

- (a) Source : Statistiques européennes du bois 1913 - 1950.
- (b) Y compris certaines quantités de sciages feuillus.
- (c) Y compris les Etats Baltes.
- (d) Vers l'Europe seulement.
- (e) Non compris les planches de caisserie.
- (f) Y compris les traverses.
- (g) Exportations totales : 1877.
- (h) Exportations totales : 311.
- (i) Exportations totales : 881.

FORECAST OF PRODUCTION,
EXPORTS & IMPORTS OF PITPROPS

In thousands of cubic metres

PREVISIONS DE LA PRODUCTION,
DES EXPORTATIONS ET DES IMPORTATIONS DE BOIS DE MINE

En milliers de mètres cubes

E/ECE/TIM/60.
Annex I
TABLEAU No 3

TABLE No. 3

Countries	1957			Jan.-June Janv.-juin 1958		1958								1959								Pays
	PRODUCTION	IMPORTS IMPORTATIONS	EXPORTS EXPORTATIONS	IMPORTS IMPORTATIONS	EXPORTS EXPORTATIONS	Normal requirements		Indigenous production		Imports requirements		Exports possibilities		Normal require- ments	Indige- nous Produc. Produ- ction natio- nale	Imports require- ments	Exports possi- bilities					
						Besoins normaux		Production natio- nale		Besoins d'impor- tations		Possibilités d'exportations											Besoins normaux	Produ- tion natio- nale	Besoins d'impor- tations	Possibi- lités d'export- tations
						A	B	A	B	A	B	A	B	Estimated in Oct. 1958 Estimés en oct. 1958								
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23
Austria	322	-	179	-	76	220	205	420	405	-	-	200	200	205	505	-	300					Autriche
Belgium	800*	232	83	28	14	1000	900	800	800	300	200	100	100	900	800	200	100					Belgique
Luxembourg	90																						Luxembourg
Bulgaria	330*	-	-	..	..	..	..	..	..	..	..	..	..	..	..	..	..					Bulgarie
Czechoslovakia	1254	-	38	-	25	960	1086	1000	1150	-	-	40	50	1080	1150	-	50					Tchécoslovaquie
Finland	1420(a)	-	1410	-	277	-	-	1300	1050	-	-	1300	1050	-	800	-	800					Finlande
France	2000	114	290	76	118	2150	1880	2500	2100	100	100	450	320	1750	2110	100	460					France
Germany, Western	2348	1057	121	235	76	3600	3300	2600	2500	1000	900	100	100	3100	2400	800	100					Allemagne, occidentale
Germany, Eastern	734	-	167	-	106	570	570	730	730	-	-	160	160	570	700	-	130					Allemagne, orientale
Hungary	238	583	-	334	-	840	790*	250	250*	590	537	-	-	830	260	570	-					Hongrie
Ireland	35(a)	-	33	-	21	2*	2*	15*	30*	-*	-	13*	28*	2*	30*	-	28*					Irlande
Italy	75	21	-	15	-	130	110	110	80	20	30	-	-	105	80	25	-					Italie
Netherlands	206	83	67	10	42	185	190	150	180	60	20	50	80	180	190	50	70					Pays-Bas
Norway	41	-	41	2	39	-	-	50	50	-	-	50	50	-	50	-	50					Norvège
Poland	2714	62	-	4	-	2700	2600	2550	2550*	150	50*	-	..*	2600	2550*	50*	..*					Pologne
Portugal	330	-	215	-	89	40	40	280	290	-	-	240	250	40	320	-	280					Portugal
Rumania	700*	-	6	..	1(c)	690	600	690	600	-	-	-	-	600*	600*	..*	..*					Roumanie
Spain	1056	18	-	7	-	920	925	910	910	10	14	-	-	940	920	20	-					Espagne
Sweden	460*	-	457	-	99	20	20	320	320	-	-	300	300	20	220	-	200					Suède
Turkey	171	32	-	34	-	250*	250*	100*	100*	150*	150*	-*	..*	250*	100*	150*	..*					Turquie
United Kingdom	1270	1516	-	355	-	2750	2530	1340	1160	1410	980*	-	-	2450	1275	1175	-					Royaume-Uni
USSR	25200	-	817	-	317	23800	23800	24700	24750*	-	..*	750	950	28150	29100	-	950					URSS
Yugoslavia	513	-	-	-	-	400	560	400	560	-	-	-	-	570	570	-	-					Yougoslavie
TOTAL EUROPE	42308	3718	3924	1100	1300	41227	40358	41215	40565	3790	2931	3753	3638	44342	44730	3140	3518					TOTAL EUROPE
Canada	195(a)	-	195(b)	..	44(b)	..	-	200	130(b)	-	-	200	130	-	130	-	130(b)					Canada
United States	..	..	..	..	..	..	..	..	..	-	-	-	-	-	-	-	-					Etats-Unis
Other countries	..	..	..	..	..	..	..	-*	..	80*	100*	-*	..*	..	..	100*	..*					Autres pays
TOTAL	..	..	..	..	..	41227	40358	41415	40695	3870	3081	3953	3768	44342	44860	3240	3648					TOTAL

A = Estimates made in October 1957.
B = Estimates revised in October 1958.
* = Estimated figure.
.. = Not available.
- = Nil or less than half a unit.
(a) Production equals exports.
(b) To Europe.
(c) January - March.

A = Estimations faites en octobre 1957.
B = Estimations révisées en octobre 1958.
* = Donnée estimée.
.. = Non disponible.
- = Néant ou moins d'une demi-unité.
(a) Production = exportation.
(b) Vers l'Europe.
(c) Janvier - mars.

TABLE No. 4a

RAW MATERIALS FOR PULPING

-

MATIERES PREMIERES POUR LA FABRICATION DE LA PATE

TABLEAU No. 4a

In thousand cubic metres

En milliers de mètres cubes

Country	REQUIREMENTS - BESOINS			INDIGENOUS PRODUCTION - PRODUCTION NATIONALE								APPARENT BALANCES (+ or -) BALANCES APPARENTES (+ ou -)		Pays
	Domestic requirements of all wood raw materials for pulp- ing (including residues) Besoins nationaux de toutes matières premières de bois pour la fabrication de la pâte (y compris les déchets)			Wood residues and all other wood not originally prepared as pulpwood Déchets de bois et tout autre bois non primitivement façonné comme bois à pâte			Pulpwood (originally prepared as pulpwood) Bois à pâte (primitivement façonné comme bois à pâte)							
	1957 Actual Réels	1958 Estimate révisée	1959 Estimation	1957 Actual Réels	1958 Estimate révisée	1959 Estimation	1957 Actual Réels	1958 Estimate révisée	1959 Estimate - Estimation			1958 (Col. 6+9-3)	1959 (Col. 7+12-4)	
									Conif. Résin.	Broadl. Feuill.	Total			
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Austria	2 859	2 880	2 990	993	835	890	1 866	2 045	1 770	330	2 100	-	-	Autriche
Belgium	421	450	450	75	85	85	131	150	120	30	150	- 215	- 215	Belgique
Luxembourg														Luxembourg
Bulgaria	..	..	..	-	..	..	91	102	..	..	..	..	..	Bulgarie
Czechoslovakia	2 137	1 973	1 578	321	345	910	1 816	1 627	483	180	668	-	-	Tchécoslovaquie
Denmark														Danemark
Finland	12 245	12 400	1 600	322	890	505*	13 600	12 500	13 000	500	13 500	+ 990	+ 700	Finlande
France	3 532	3 700	3 900	477	530	540	2 000	2 710	1 630	1 280	2 910	- 460	- 450	France
Germany Western	5 173 (a)	5 000	5 000	405	560	600	3 450	3 320	2 720	720	3 440	- 1 120	- 960	Allemagne occidentale
Germany Eastern	1 991	2 162	2 195	..	32	103	1 784	1 442	1 037	305	1 342	- 688	- 750	Allemagne orientale
Greece														Grèce
Hungary	94	116	125	2	-	-	21	22	-	25	25	- 94	- 100	Hongrie
Ireland														Irlande
Italy	1 696	1 950	2 015	-	10	15	731	870	70	830	900	- 1 070	- 1 100	Italie
Netherlands	399	285	270	-	-	-	24	23	18	5	23	- 262	- 247	Pays-Bas
Norway	5 300	4 900	4 900	400	400	400	4 900	4 500	4 400	100	4 500	-	-	Norvège
Poland	2 071	2 061	2 250	90	123	133	2 199	1 993	1 709	245	1 954	+ 55	- 163	Pologne
Portugal	330	330	350	..	0.5	0.5	330	330	300	75	375	-	- 25	Portugal
Rumania	670	790	820*	190	220	230*	565*	670	300*	390*	690*	+ 100	+ 100	Roumanie
Spain	390	460 (b)	525 (b)	-	20	25	350	350	250	150	400	- 90	- 100	Espagne
Sweden	21 300	21 500 (b)	20 250 (b)	1 350	1 400	1 350	20 500	20 200	18 500	500	19 000	+ 100	+ 100	Suède
Switzerland	685	720	660	90	85	70	355	390	335	5	340	- 245	- 250	Suisse
Turkey	100*	110	150	..	120	150	100*	165	195	10	205	+ 175	+ 205	Turquie
United Kingdom	543	635	800	13	15	15	208	220	(205*)	..	205	- 400	- 400	Royaume-Uni
U.S.S.R.	12 000	14 450	14 850	320	500	1 400	12 200	15 000	15 400	-	15 400	+ 1 050	+ 1 950	U.R.S.S.
Yugoslavia	558	587	785	95	100	105	1 332	975	480	912	1 392	+ 488	+ 722	Yougoslavie
TOTAL EUROPE	74 494	77 459	78 463	5 643	6 272	7 822	69 368	69 504	63 107	6 592	69 699	- 1 685	- 942	TOTAL EUROPE
Canada	34 656	32 245	32 245	2 182	3 530	3 700	33 196	25 436	23 900	1 360	25 260	- 3 279	- 3 285	Canada
United States	75 746	72 220	74 340	8 337	8 070	8 280	64 196	63 300	52 000	11 680	63 680	- 350	- 2 380	Etats-Unis
Other countries														Autres pays
TOTAL														TOTAL

* = estimated figure.
 .. = not available.
 - = nil or less than half a unit.

* = donnée estimée.
 .. = non disponible.
 - = néant ou moins d'une demi-unité.

(a) Excluding residues.
 (b) Apparent consumption.

(a) Non compris les déchets.
 (b) Consommation apparente.

RAW MATERIALS FOR PULPING

IMPORTS REQUIREMENTS and EXPORTS
AVAILABILITIES

In thousand cubic metres

TABLE No. 4b

MATIERES PREMIERES POUR LA FABRICATION DE LA PATE

BESOINS D'IMPORTATIONS et POSSIBILITES
D'EXPORTATIONS

En milliers de mètres cubes

TABLEAU No. 4b

Country	1957 IMPORTS IMPORTA- TIONS Pulpwood Bois à pâte	IMPORTS REQUIREMENTS - BESOINS D'IMPORTATIONS							1957 EXPORTS EXPORTA- TIONS Pulpwood Bois à pâte	EXPORTS AVAILABILITIES - POSSIBILITES D'EXPORTATIONS										Pays	
		All wood materials for pulping Tous matériaux de bois pour la fabrication de la pâte								Wood originally prepared as pulpwood Bois primitivement façonné comme bois à pâte						Wood residues and wood not originally prepared as pulpwood					
		1958 Estimate - Estimation revised révisée				1959 Estimate - Estimation				1958 Estimate - Estimation revised révisée				1959 Estimate - Estimation		Déchets de bois et bois non primitive- ment façonné comme bois à pâte					
		Oct.1957				Oct.1957				Oct.1957				Oct.1957			Estimate - Estimation				
			Total	Conif. Résin.	Broadl. Feuill.		Total	Conif. Résin.			Broadl. Feuill.	Total	Conif. Résin.		Broadl. Feuill.	Total	Conif. Résin.	Broadl. Feuill.	Total		1958
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	
Austria	58	70	-	50	50	-	50	50	-	-	-	-	-	-	-	-	-	-	-	Autriche	
Belgium Luxembourg	353	282	250	5	255	250	5	255	17	13	4	10	14	4	10	14	25	25	25	Belgique Luxembourg	
Bulgaria	-	-	..	..	..	..	..	..	-	-	..	..	..	..	..	..	-	..	..	Bulgarie
Czechoslovakia	-	-	..	-	..	-	..	-	213	200	90	130	220	50	130	180	..	..	..	Tchécoslovaquie
Denmark	0.1	..	..	..	..	..	..	..	26	..	..	..	..	..	..	..	..	..	..	Danemark
Finland	-	65	68	-	68	68	-	68	2308	1900	2100	-	2100	2000	-	2000	..	..	..	Finlande
France	840	850	600	-	600	700	-	700	136	90	3	90	93	3	90	93	20	30	40	France	
Germany Western	1758	1720	720	400	1120	520	440	960	159	-	1	-	1	1	-	1	-	..	..	Allemagne occid.
Germany Eastern	539	538	541	147	688	600	150	750	-	-	-	-	-	-	-	-	-	-	-	Allemagne orient.	
Greece	-	-	..	..	..	..	..	..	-	-	..	..	..	..	..	..	-	..	..	Grèce
Hungary	73	100	97	-	97	108	-	108	8	..	-	7	7	-	5	5	-	-	-	Hongrie	
Ireland	1	-	..	..	..	..	..	..	-	..	..	..	..	..	..	..	..	..	..	Irlande
Italy	965	1070	680	390	1070	700	400	1100	-	-	-	-	-	-	-	-	-	-	-	Italie	
Netherlands	362	185	170	15	185	260	10	270	5	-	16	-	16	20	-	20	-	-	-	Pays-Bas	
Norway	106	200	250	-	250	250	-	250	165	300	250	-	250	250	-	250	-	-	-	Norvège	
Poland	75	60	120	-	120	280	-	280	287	160	-	120	120	15	120	135	..	..	..	Pologne
Portugal	-	-	-	-	-	-	-	-	15	12	12	60	72	15	10	25	-	-	-	Portugal	
Rumania	-	-	-	-	-	-	-	-	55	80	..	..	..	..	..	..	-	..	..	Roumanie
Spain	33	50	50	-	50	55	-	55	-	-	-	-	-	-	-	-	-	-	-	Espagne	
Sweden	299	300	300	-	300	300	-	300	890	500	400	-	400	400	-	400	-	-	-	Suède	
Switzerland	282	290	220	25	245	215	25	240	1	-	-	-	-	-	-	-	5	10	10	Suisse	
Turkey	71	47	..	..	..	..	..	..	-	-	-	-	-	-	-	-	-	-	-	Turquie
United Kingdom	376	400	(400*)	..	400	(400*)	..	400	-	-	-	-	-	-	-	-	-	-	-	Royaume-Uni	
U.S.S.R.	363	350	200	-	300	300	-	300	591	650	850	-	850	850	-	850	-	-	-	U.R.S.S.	
Yugoslavia	-	-	-	-	-	-	-	-	775	825	-	488	488	-	712	712	-	-	-	Yougoslavie	
TOTAL EUROPE	6554	6577	4766	1032	5798	5006	1080	6086	5651	4730	3726	905	4631	3608	1077	4625				TOTAL EUROPE	
Canada	-(a)	..	..	..	..	..	..	..	740(b)	750(c)	500(c)	-	500(c)	600(c)	-(c)	600(c)	..	851	900	Canada
United States	-(d)	..	..	..	..	..	..	..	-(e)	..	..	..	..	..	..	..	..	..	..	Etats-Unis
TOTAL	6554	6577	4766	1032	5798	5006	1080	6086	6391	5480	4226	905	5131	4208	1077	5285				TOTAL	

* = estimated figure,
 .. = not available.
 - = nil or less than half a unit.

a) = From Europe Total : 458.
 b) = To Europe Total : 4549.
 c) = To Europe.
 d) = From Europe Total : 4505.
 e) = To Europe Total : 258.

* = donnée estimée.
 .. = non disponible.
 - = néant ou moins d'une demi-unité.

a) = En provenance de l'Europe Total: 458.
 b) = Vers l'Europe Total: 4549.
 c) = Vers l'Europe.
 d) = En provenance de l'Europe Total: 4505.
 e) = Vers l'Europe Total: 258.

PROGRAMME OF WORK OF THE TIMBER COMMITTEE FOR 1958/59

09. - TIMBER

(Note: The work programme of the ECE in the field of timber is developed and carried out jointly with the FAO, the latter organization providing the professional staff engaged in the work. Below are listed the projects, primarily the responsibility of the ECE Timber Committee, to be undertaken during the period 1958/59. In addition to the annual session of the Timber Committee, Joint FAO/ECE bodies will deal with the projects where appropriate. The joint projects for which FAO is primarily responsible do not figure in this list)

09.1 Priority projects of a continuing nature

09.1.1 Review of timber market for Europe including timber statistics

Authority: Timber Committee (E/ECE/TIM/46, Annex III, section VII; E/ECE/TIM/48, para. 5; E/ECE/TIM/51, para. 3; E/ECE/TIM/54, para. 9)

Description: The Timber Committee reviews periodically the situation for sawn softwood, and also for hardwood and small-sized roundwood. With regard to the last, however, principal attention will now be concentrated on pulping raw materials. In addition, the Secretariat publishes quarterly market reports for sawn softwood, pitprops and pulpwood, together with statistics relating to production, trade and prices in the main forest products in Europe and North America. The market reports are based on information collected from official and other sources and publications, which is analysed by the ECE Secretariat. In connection with the market intelligence furnished to the Committee, the Secretariat prepares and, where appropriate, publishes price series supplemented by graphs, comparisons of timber prices and those of alternative materials, and relevant economic indicators. Certain adjustments in presentation of price statistics are contemplated. (E/ECE/TIM/46, Annex III, section VII; E/ECE/TIM/48, para. 5; E/ECE/TIM/51, para. 9; E/ECE/TIM/57, para. 12). In connection with sessions of the Committee opportunity is provided to interested countries to discuss special problems affecting the timber trade of two or more countries (E/ECE/TIM/51, para. 10; E/ECE/TIM/54, para. 7).

09.1.2 Increased efficiency in forestry operations

Authority: Timber Committee (E/ECE/TIM/46, Annex III, section VI; E/ECE/TIM/48, para. 8; E/ECE/TIM/51, para. 8; E/ECE/TIM/54, para. 12; E/ECE/TIM/57, para. 8)

Description: This project aims at increasing efficiency in forestry operations by improving methods of work, by mechanization and by better training of forest workers and prevention of accidents. This project is dealt with by the Joint FAO/ECE Committee on Forest Working Techniques and Training of Forest Workers, in cooperation with the ILO, by means of study groups and with the collaboration of experts. A concentration of work and simplification of the organisational structure of the Committee and its study groups will be discussed during the Committee's forthcoming third session in June 1959.

09.1.3 Studies on the more rational utilization of wood

Authority: Timber Committee, 16th Session, 1958, (E/ECE/TIM/60)

Description: Studies should be undertaken on

Industrial utilization of small-sized roundwood and fuelwood;

Utilization of timber industry waste;

Search for new outlets for certain non-coniferous timber species.

The Secretariat will convene during 1959 a consultation of selected experts and rapporteurs to be made available by interested governments. The experts' first task will be to establish an outline and a working method for the study of the industrial utilization of small-sized roundwood and fuel-wood. The Secretariat will explore with these experts the advisability of combining this study with the investigation of new outlets for certain non-coniferous timber species. Due attention should also be paid to coordinating this investigation with various studies now being undertaken by the Joint FAO/ECE Committee on Forest Working Techniques and Training of Forest Workers and its study groups. In addition the Secretariat will attempt to organize during 1959 a similar consultation for the purpose of preparing an outline and defining working methods with regard to the utilization of timber industry waste.

09.2 Priority projects of an ad hoc nature

09.2.1 Minimum programme for European forest and forest products statistics

Authority: Timber Committee (E/ECE/TIM/46, Annex III, section VII; E/ECE/TIM/48, para. 5; E/ECE/TIM/54, para. 13; E/ECE/TIM/57, para. 9)

Description: This project aims at setting up an overall minimum programme for forestry and timber statistics covering the whole field. This programme is being examined by the Joint FAO/ECE Working Party on Forest and Forest Products Statistics, which meets from time to time as the need arises. In addition, the minimum programme of the Working Party also considers special statistical problems referred to it by the parent bodies.

09.2.2 Study on trends in the utilization of wood and its products

Authority: Timber Committee (E/ECE/TIM/46, Annex III, section IX; E/ECE/TIM/48, para. 8; E/ECE/TIM/51, para. 7; E/ECE/TIM/54, para. 10; E/ECE/TIM/57, para. 7).

Description: The aim of this study is to examine and attempt projections of trends in the utilization of wood and its products in various end-uses in European countries, and of the impact of these trends on Europe's timber requirements. For 1959 priority is confined to the continuation of sector studies on packaging and sleepers.

09.3 Other projects

09.3.1 Long-term trade arrangements

Authority: Committee on the Development of Trade (E/ECE/TRADE/8, para. 6A); Timber Committee (E/ECE/TIM/48, para. 6; E/ECE/TIM/54, para. 8)

Description: The possibilities of medium- and long-term trade arrangements are investigated upon request as needed.

29.3.2

General conditions of sale for timber including timber grading

Authority: Committee on the Development of Trade (E/ECE/TRADE/8, para. 11); Timber Committee (E/ECE/TIM/48, para. 11; E/ECE/TIM/SI, para. 6; E/ECE/TIM/54, para. 11).

Description: A set of optional general conditions for sale of sawn softwood was prepared in 1956. The question whether this work should be extended to timber other than sawn softwood and how to include timber grading in the general conditions is under consideration. In that connection, the Secretariat follows the work of the International Organization for Standardization (ISO). No work on this project is foreseen during the coming year.