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Timber Committee

REPORT OF THE TWENTY-SIXTH SESSION, 7-11 OCTOBER 1968

As approved by the Committee

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INTRODUCTION

1. The Timber Committee held its twenty-sixth session in Geneva from 7 to 11 October 1968. It was attended by delegates from Austria, Belgium, Bulgaria, Byelorussian SSR, Czechoslovakia, Federal Republic of Germany, Finland, France, Greece, Hungary, Italy, Netherlands, Norway, Poland, Portugal, Romania, Spain, Sweden, Switzerland, Turkey, Ukrainian SSR, USSR, United Kingdom, United States of America and Yugoslavia. Canada participated in accordance with Article 11 of the Commission's terms of reference. Representatives of the Food and Agriculture Organization of the United Nations (FAO) and the International Labour Organization (ILO) also attended. The International Confederation of Free Trade Unions (ICFTU), the International Organization of Employers, the European Federation of Associations of Fibreboard Manufacturers (FEROPA) and the European Federation of Associations of Particle Board Manufacturers (FESYP), non-governmental organizations, sent representatives. Staff officials of the Commission of the European Economic Communities (EEC) and of the Organization for Economic Co-operation and Development (OECD) attended at the invitation of the Secretariat (for list of delegates, see E/ECE/TIM/90).

2. The Chairman of the Timber Committee, Mr. G. E. Hampson (United Kingdom) opened the session and welcomed delegates to the meeting.

Adoption of the Agenda (Item 1 of the Agenda)

3. The Provisional Agenda (E/ECE/TIM/88), presented by the Secretariat, was adopted.

Election of Officers (Item 2 of the Agenda)

4. The Committee re-elected Mr. G. E. Hampson (United Kingdom) as Chairman, and Mr. K. Ronge (Sweden) and Mr. N. Dumitrescu (Romania) as Vice-Chairmen.

Twenty-third session of the Economic Commission for Europe (Item 3 of the Agenda)

5. On the basis of TIM/Working Paper No.118, the Committee took note of the resolutions and other decisions of the twenty-third session of the Economic Commission for Europe.

6. In particular, the Committee noted the relevance to its work of Resolution 3 (XXIII) - Long-term Programme and Methods of Work of the Commission, and Resolution 4 (XXIII) - Scientific and Technological Co-operation. Delegates considered that in the fields covered by these two resolutions, the Timber Committee was making an important contribution to the ECE's overall work.

Matters affecting the work of the Timber Committee (Item 4 of the Agenda)

7. The Committee endorsed the proposals of its Office-holders contained in TIM/Working Paper No.119 on the procedure for the market discussions at its current session.

8. With regard to the proposals for medium-term trends surveys, it considered that these would be valuable in providing a link between its short-term market forecasts and the long-term trends and prospects studies. It agreed to the proposals as to the scope, programme and method of conducting the surveys and decided to undertake on a trial basis a medium-term survey of the market for pulpwood, pitprops and miscellaneous roundwood at its next session along the lines set out in the above-mentioned Working Paper. The United States delegation, while considering such surveys useful, doubted whether appropriate statistical information would be available for the United States. It noted that the capacity surveys of the FAO Advisory Committee on Pulp and Paper would provide valuable background material.

Activities of other international bodies relevant to the work of the Committee (Item 5 of the Agenda)

(a) Food and Agriculture Organization (FAO)

9. The Committee's attention was drawn to (a) the election of Mr. A. Boerma as Director-General of FAO, (b) its reorganization which puts increased emphasis on field programmes as well as improved administrative and operational efficiency, and (c) the five areas of programme concentration being pursued by the Director-General.

10. The Committee also noted that the FAO Committee on Wood-Based Panel Products would hold its second session from 6 to 8 November 1968, and would deal, inter alia, with a world-wide capacity survey, incorporating the European and North American results of the Committee's biennial survey of the panel products industries (see item 12(f) of the Agenda).

11. Attention was also drawn to the 9th session of the FAO Advisory Committee on Pulp and Paper, held from 13 to 15 May 1968, to which national or regional appraisals of the medium and long-term outlook in consumption, production and trade of pulp and paper had been presented by delegates of major producing countries. The Committee was informed that the second session of the FAO Committee on Forest Development in the Tropics would be held in October 1969; and that work was progressing on the Indicative World Plan for Agriculture, which includes the forestry and fisheries sectors.

(b) United Nations Conference on Trade and Development (UNCTAD)

12. The Committee took note of the second meeting of the Joint UNCTAD/FAO Working Party on Forest and Timber Products, held from 23 to 27 September 1968, which examined, as its major concern, the possible establishment of tropical timber bureaux. This Working Party had proposed a bureau with autonomous branches in North America and Europe which, without engaging in commercial activities, would promote the export of tropical forest products with particular emphasis on lesser-known species and processed products.

13. The Working Party also recommended that the possibility be investigated of establishing the bureau financed partly by the developing countries and partly by the United Nations Development Programme Special Fund with a view to eventual self financing by the developing countries. Interested developing countries would be assisted in their preparatory arrangements by FAO and UNCTAD (through the UNCTAD/GATT International Trade Centre).

Transport, handling and packaging of forest products (Item 6 of the Agenda)

14. The Committee received a report on recent developments in the transport, handling and packaging of forest products from the expert appointed to co-ordinate its activities, Mr. Felix Palmer (United Kingdom). It considered that developments in this field were of great importance for the future competitive position of forest products. The change to modern methods of transport and handling at every stage between producer and consumer was rapidly gaining momentum in Europe, and there was an urgent need to keep developments under constant review.

15. The Committee was also informed of preparations for the seminar on the transport, handling and packaging of sawn softwood, to be held in London on 14 October 1968, with a visit to Tilbury Docks on 15 October. It invited Mr. Palmer to report on the results of the seminar to its twenty-seventh session. It hoped that the seminar would provide a valuable opportunity for the participants, who will include representatives from producers, exporters, importers, shipowners, stevedores and harbour authorities, to discuss mutual problems and to try to find acceptable compromises to possibly conflicting interests.

16. The Committee expressed its deep appreciation to Mr. Palmer for his valuable work over the past year, in particular for the preparations for the seminar.

Timber Bulletin for Europe: follow-up action to the Study on the consumption of tropical hardwoods in Europe (Item 7 of the Agenda)

17. The Timber Committee took note of the preliminary results of an enquiry into work carried out on, and available information relating to, the utilization of tropical hardwoods (TIM/Working Paper No.121). This project had been agreed to at its 25th session as a follow-up to the Study on the consumption of tropical hardwoods in Europe.

18. It was pointed out that a few countries had not yet replied to the enquiry, while a number of others had not been in a position to provide full answers.

19. The Committee heard a statement from the representative of FAO drawing attention to work under way to collate available data on the properties of tropical hardwoods and their present and potential uses.

20. The Committee invited countries which had not yet done so to reply as fully as possible to the enquiry so that it would complement effectively the work being carried out by FAO on a world-wide level on tropical hardwoods. It agreed to examine at its next session what further activities it might undertake in the fields of marketing and utilization of tropical hardwoods.

Report of the Symposium on factors influencing the consumption of wood-based panel products (Item 8 of the Agenda)

21. The Committee expressed its satisfaction with the results of the Symposium on factors influencing the consumption of wood-based panel products (TIM/PANELS/32 and TIM/Working Paper No.122). It noted that the Symposium had achieved positive results in the field of utilization techniques, although it seemed that it had not been possible to explore in similar depth the important problems connected with the promotion and marketing of panel products.

22. In accordance with the Symposium's recommendations for follow-up action, the Committee requested the Secretariat, in co-operation with the ECE Housing Committee, FAO, and other competent international organizations, to undertake an enquiry into the comparability of national building codes and the regulations relating to the behaviour of wood products, including wood-based panel products, in fire, and to establish a bibliography of the fire aspects of wood-based materials.

23. The Committee requested the Joint FAO/ECE Working Party on Forest and Forest Products Statistics to draw up an appropriate questionnaire for the collection of more detailed statistics on panel products, as set out in paragraph 26 of TIM/PANELS/32, for presentation on an annual basis to the Committee's sessions. It also invited the Working Party to examine the basis for distinguishing between improved and other types of board in internationally comparable statistics.

Preparations for the Symposium on the industrial processing of temperate-zone hardwoods, to be held in Czechoslovakia in May 1969 (Item 9 of the Agenda)

24. The Committee received a report on preparations for the Symposium, which it agreed to include in its programme of work for 1968/69. It noted that offers had been received from several countries to nominate experts to present papers to the Symposium, and expressed the view that the Symposium would provide a valuable opportunity to exchange experiences on a subject of considerable concern to many countries.

Long-term programme of work for 1967/68 to 1971/72 (Item 10 of the Agenda)

25. The Committee's attention was drawn to ECE Resolution 3(XXIII) - Long-term programme and methods of work of the Commission, as well as to the recent decision of the Economic and Social Council - E/RES/1367(XLV), operative paragraph 8, in which the Council requested that the projects included in the work programmes of its subsidiary bodies be classified into three categories of priority, namely: A. Work of high priority, B. Work of priority, and C. Work of lesser priority.

26. The Committee considered that its present long-term programme of work (1967/68 to 1971/72) accurately reflected the needs of the present time and that, in addition, it had already established its priorities through the spacing in time of these projects (E/ECE/TIM/87, Annex II). Furthermore, it was not possible to express the degree of priority in its programme of work in any other manner, since the activities listed as projects reflected for the most part the broad fields of the Committee's activities by sectors, rather than clearly identified single projects.

27. The Committee considered the results of the Secretariat enquiry regarding additional projects that might be included in the Timber Committee's long-term programme of work and in particular the proposal to establish a permanent subsidiary body on the wood-working industries. After a prolonged discussion, the Committee decided to reconsider the latter question at its twenty-seventh session. It agreed to convene in the interval an ad hoc meeting of experts to examine the Committee's existing long-term programme of work in the field of the wood-working industries, together with the replies to the Secretariat's enquiry referred to above, and to present its findings to the Committee's next session.

Programme of work for 1968/69 (Item 11 of the Agenda)

28. The Committee adopted that part of its long-term programme of work relating to 1968/69 (Annex II).

Market review and prospects (Item 12 of the Agenda)(a) Introduction of market statements by delegates

29. The Committee received statements on the developments in the market for sawn softwood, hardwoods, pulpwood, pitprops and panel products since its last session in October 1967, and examined the Secretariat's draft annual forest products market review (TIM/Working Paper No.125 and addenda). It compiled the worksheets reproduced in this report as Tables 1 to 16 of Annex I.

(b) Sawn softwoodSituation in 1967

30. Production of sawn softwood in Europe (USSR not included) declined last year by 210,000 standards (981,000 m³) to a total of 12.1 million stds (56.6 million m³) or rather less than 2% below the total of the previous year. Apparent consumption estimated at 14.0 million stds (65.4 million m³) was also lower, but by less than 1% compared with 1966. Europe's sawn softwood trade in 1967 was little changed from that of the previous year. Exports (including those of the USSR) at 5.1 million stds (23.7 million m³) were down by less than 2% while imports at 5.3 million stds (24.8 million m³) rose by rather more than 1%. Imports were higher, despite a massive fall of 24% in western Germany which was more than offset by substantial increases in a number of other countries, notably the United Kingdom, Italy, Hungary, France and Denmark.

Development of the 1968 market

31. At last year's Timber Committee session, it was considered that with the approach of the buying campaign for 1968 there was an improvement in the tone of the northern European market. A year later, it now appears that this assessment of the prospects for 1968 was a sound one. The Committee had foreseen that Europe's import requirements of sawn softwood would be about 2% higher in 1968 than in 1967, and that exports would be marginally higher. However, the new estimates given at this year's session indicate that trade for 1968 has expanded at a faster rate than had been anticipated a year ago. Europe's imports for 1968 now estimated at 5.56 million stds (25.98 million m³) are about 263,000 stds (1.2 million m³) or 5% higher than the actual total for 1967, and the revised estimate for exports at 6.04 million stds (28.22 million m³) shows an increase of over 240,000 stds (1.12 million m³) or 4% higher than in 1967.

32. In the case of the revised estimates of imports in the current year, it is interesting to note that the direction of import trends in all but five European countries conforms with the patterns anticipated a year ago. The revised estimates for 1968, however, from Italy, western Germany, the Netherlands, Belgium-Luxembourg and Hungary now show substantially higher estimated imports for 1968 than they

originally expected. These five countries between them account for more than 90% of Europe's upward revision of import requirements in 1968. The very much higher total of imports expected by the United Kingdom in 1968 compared with 1967 had been forecast at last year's session and the revised estimate is only 2% above that given on that occasion.

33. The principal changes in estimates of sawn softwood exports in 1968, compared with those submitted a year ago, are increases of 150,000 stds (+13%) from Sweden; 65,000 stds (+4%) from the USSR; 64,000 stds (+12%) from Austria and an increase of 65,000 stds (+65%) in the estimated exports from the United States to Europe. Against these increases, Canada's exports to Europe in 1968, have been revised downwards by 113,000 stds. (-20%) and export estimates for Finland and Romania are both somewhat lower now than had been expected last year.

34. The buying campaign for 1968 was temporarily brought to a halt by the devaluation of sterling in November 1967, which created a great deal of uncertainty in importing and exporting countries alike. However, following the issue of stock notes by the USSR at price levels which established a basis for the resumption of negotiations, the 1968 campaign then developed rapidly. The reports from most countries indicate that conditions in the sawn softwood market have been reasonably stable in 1968, although in central Europe, the market only gradually recovered from the effects of last year's storm damage to forests.

35. It says much for the closer understanding of the mutual problems of importers and exporters that an event of such major economic significance as the devaluation of sterling should not have created more disturbance than it did in the European sawn softwood market. A decade or more ago the situation would probably have been vastly different.

Outlook for 1969

36. For 1969 Europe's estimated total of import requirements of 5.4 million stds (25.1 million m³) shows a decline of 196,000 stds (920,000 m³) or 3½%. This is almost entirely due to a decrease of 185,000 stds (865,000 m³) or 9½%, in the estimated import requirements of the United Kingdom in 1969 compared with the estimated total for the current year. The reason for this, which was referred to in the United Kingdom's market statement, is the anticipated rundown of importers', merchants' and consumers' stocks of sawn softwood that is expected to take place prior to the introduction of metric measure in April 1970. However the Committee noted that this forecasted downward trend might not be so severe, should ample supplies of sawn softwood cut to metric measure, be available for importation later in 1969 for winter stock-holding.

37. The estimated total of Europe's export prospects in 1969, including those to Europe from countries outside the region, at 6.0 million stds (28.0 million m³) shows a slight decline of 40,000 stds (187,000 m³) compared with the revised total for 1968.

Reduced exports prospects from Sweden, Czechoslovakia, Poland and Romania are not quite counterbalanced by slightly increased export availabilities from Finland and Austria, and an increase in Canada's estimated export availabilities for Europe.

38. The estimate of Canada's export prospects to Europe envisages that the drop of 20% in exports to Europe expected in 1968 will be reversed in 1969, so that the total for next year will approach the 1967 level of 500,000 stds. (2.3 million m³). In this connexion it is interesting to note that whereas Canada's production of sawn softwood is expected to increase by 340,000 stds in 1968, its exports to Europe are estimated to drop by 56,000 stds. This change of pattern is due to Canada's increased exports to the United States and Japan at prices substantially higher than those ruling in the European market.

39. Some years ago the Committee was apprehensive lest the recession in the United States demand for lumber would disrupt the stability of the European market by increasing the availabilities of Canadian wood. The reverse would now seem to be the case and the higher Canadian export prices for lower quality timber compared with those of other supplying countries may have an influence on the pattern of Europe's imports in 1969.

40. The question of forward prices for 1969 was also referred to in some of the reports of European exporters. Several exporting countries expressed the opinion that the economic return on production is unsatisfactory, especially in whitewood and lower qualities of redwood.

41. At last year's session, the Committee noted that the economies of most western European countries were under less strain than in 1966 and that some had embarked upon cautious reflationary policies, although no rapid upsurge in demand was foreseen. In the intervening period, the recovery in overall economic activity in western Europe has gathered momentum, although a few countries are maintaining restrictive policies and in some there has been little recovery as yet in dwelling construction. In eastern Europe, economic expansion has continued and activity in dwelling construction, after remaining on a plateau for a number of years, appears to have resumed its upward trend. In both western and eastern Europe, economic expansion in 1969 is expected to be maintained.

42. After the slight setbacks in the two previous years, the expansion of Europe's domestic requirements of sawn softwood is expected to be resumed in 1968 and 1969. At 14.24 million stds (66.5 million m³) the estimated total for 1968 is 2% up on the last year and a further increase of 2½% to a total of 14.28 million stds (66.7 million m³) is forecast for 1969.

43. The Committee noted that an early opening of the buying campaign for 1969 was generally anticipated from the reasonably optimistic tone of the statements presented by delegations, the Committee concluded that there should be an orderly development of next year's market.

(c) Hardwoods

(i) Sawn hardwood

44. Totals of Europe's production, trade and domestic requirements of sawn hardwood in 1967 and the Timber Committee's estimates for 1968 and 1969 are shown below:

European totals for sawn hardwood in 1967 and estimates
for 1968 and 1969
(million m³)

	Year	Production a/		Imports		Exports		Domestic requirements a/	
		Volume	% change from previous year	Volume	% change from previous year	Volume	% change from previous year	Volume	% change from previous year
Temperate-zone species	1967	..		2.06	+ 0.6%	1.97	- 1.3%	..	
	1968	..		2.13	+ 2.9%	2.00	+ 1.5%	..	
	1969	..		2.11 ^{b/}	- 0.9%	2.04 ^{c/}	+ 2.0%	..	
Tropical species	1967	..		1.06	-0.9%	0.06	+15.7%	..	
	1968	..		1.13	+ 6.6%	0.06	-	..	
	1969	..		1.17 ^{b/}	+ 3.5%	0.06 ^{c/}	-	..	
Total	1967	16.71	+ 1.6%	3.11	-	2.03	- 0.8%	17.45	+2.4% ^{d/}
	1968	16.46	- 1.5%	3.26	+ 4.8%	2.06	+ 1.5%	17.28	-1.0%
	1969	16.82	+ 2.2%	3.28 ^{b/}	+ 0.6%	2.10 ^{c/}	+ 1.9%	17.52	+1.4%

a/ Excluding USSR

b/ Import requirements

c/ Export prospects

d/ Change in apparent consumption (roughly equal to domestic requirements)

45. After reaching peak levels in 1967, the estimates show that production and domestic requirements of sawn hardwood in Europe (excluding the USSR) may decline slightly in 1968. This is due chiefly to lower estimates submitted for Italy, where output is expected to revert to normal levels after reaching an exceptionally high level in 1967. The slow long-term upward trend in Europe's production and domestic requirements is expected to be resumed in 1969.

46. Europe's exports and imports of sawn hardwood, including those of the USSR, levelled out in 1967 at about the record 1966 volumes. Exports are estimated to rise slightly in both 1968 and 1969. For imports, the estimates show a faster growth in 1968 of imports of tropical sawn hardwood than of temperate-zone, and in this connexion the Committee noted the substantial rise in a number of countries' imports from Malaysia and the Ivory Coast that had taken place in the first half of the year, compared with January-June 1967.

47. Stocks in the leading sawn hardwood importing country, the United Kingdom, which were low at the end of 1967, fell further in the early part of 1968 and substantially increased imports of sawn hardwood estimated for 1968 will go partly to re-stocking. In 1969 there may be further growth of imports of tropical sawnwood, but a slight fall of those of temperate-zone species, due principally to lower United Kingdom import requirements of temperate-zone sawn hardwood.

(ii) Hardwood logs

48. The Committee's estimates of Europe's trade in hardwood logs are given below:

European totals for hardwood logs in 1967 and estimates for 1968 and 1969
(million m³)

	Year	Imports		Exports	
		Volume	% change from previous year	Volume	% change from previous year
Temperate-zone species	1967	1.56	+ 16.9%	1.24	+ 8.8%
	1968	1.55	- 0.6%	1.31 _{b/}	+ 4.8%
	1969	1.59 _{a/}	+ 2.4%	1.28 _{b/}	- 2.0%
Tropical species	1967	5.07	- 3.4%	0.06	+18.2%
	1968	5.39	+ 6.3%	0.06 _{b/}	- 3.1%
	1969	5.49 _{a/}	+ 1.9%	0.06 _{b/}	- 4.8%
Total	1967	6.63	+ 0.7%	1.31	+10.9%
	1968	6.94 _{a/}	+ 4.7%	1.37 _{b/}	+ 4.4%
	1969	7.08 _{a/}	+ 2.0%	1.34 _{b/}	- 2.1%

Note: Detail may not add to totals, due to rounding off.

_{a/} Import requirements

_{b/} Export prospects

49. Europe's trade in hardwood logs expanded in 1967, with exports, including those of the USSR, rising by 10% to a new record level and imports showing only a slight increase. Imports of temperate-zone hardwood logs rose strongly in 1967, but those of tropical species declined by 3½%. Arrivals from all of Europe's main tropical hardwood log suppliers fell, with the exception of the Ivory Coast, whose shipments to Europe showed a further substantial increase. Hardwood logs from the latter source accounted for nearly two-fifths of Europe's total tropical log imports in 1967.

50. After a strong expansion in the first half of 1968, the Committee's estimates indicate that Europe's imports of tropical hardwood logs may grow more slowly in the second half. Exceptionally heavy rains in West Africa are reported to be delaying

exploitation and the transport of logs to the coast for export. In contrast to the developments in 1967, tropical species are estimated to account for the whole of the increase in Europe's hardwood log imports in 1968. Most of the leading importing countries expect to increase their imports of tropical logs. A further expansion in hardwood log import requirements is forecast for 1969, the rate of growth, however, being slower than in 1968 and both temperate-zone and tropical species contributing to the increase. The estimated volume of tropical log imports, 5.49 million m³, is similar to the previous peak recorded in 1964.

51. Europe's hardwood log exports in 1968 are estimated to rise above their peak 1967 level, the main change expected being an exceptional volume of shipments of 60,000 m³ from Czechoslovakia, normally only a minor exporter of this assortment. With the latter's exports estimated to revert to a low level in 1969, Europe's estimated total of export prospects next year is slightly below that for 1968.

(iii) Prices for hardwoods

52. Prices for hardwoods, both logs and sawnwood, have been firm during 1968, especially so in the case of certain tropical species such as sipo, the availability of which has been insufficient to meet the demand in Europe. Prices for European hardwoods have also been firm, although there remains a wide differential between those for the top and the lower qualities.

(d) Pulpwood and pitprops

(i) Pulpwood

53. Totals of Europe's indigenous availabilities, trade and domestic requirements of pulpwood (round or split, residues, chips and particles) in 1967 and the Timber Committee's estimates for 1968 and 1969 are shown below:

European totals for pulpwood in 1967 and estimates for 1968 and 1969

(million m³)

Year	Indigenous availabilities ^{a/}		Imports		Exports		Domestic requirements ^{a/}	
	Volume	% change from previous year	Volume	% change from previous year	Volume	% change from previous year	Volume	% change from previous year
1967	108.53	+ 9.9%*	12.85	+ 9.7%*	12.06	+ 7.5%*	111.00	+ 5.6% ^{b/}
1968	108.05	- 0.4%	12.62	- 1.8%	10.80	-10.5%	114.81	+ 3.4%
1969	113.51	+ 5.1%	12.41 ^{c/}	- 1.7%	10.58 ^{d/}	+ 2.0%	119.82	+ 4.4%

a/ Excluding the USSR

b/ Change in apparent consumption (roughly equal to domestic requirements)

c/ Import requirements

d/ Export prospects

54. The revised estimate for 1968 of domestic requirements of 114.8 million m³ in Europe (excluding the USSR) is only 1½% higher than the total forecast at last year's Timber Committee session. An interesting example of the improvement in the ability to give accurate forecasts for the year ahead is shown by the fact that in aggregate the revised total for domestic requirements in the three Nordic countries in 1968 is now estimated at 63.9 million m³ compared with 64.0 million m³ which was put forward a year ago. As forecast on that occasion the trend was upwards in Sweden and Finland and declining in the case of Norway.

55. Apart from these three countries, which between them account for well over a half of Europe's total requirements of pulpwood, there were notable increases in a number of countries, including Austria, Romania and Poland.

56. Out of Sweden's total consumption of nearly 33 million m³ of wood used for pulping and for the production of fibreboard and particle board in 1967, roughly 6 million m³ (18%) consisted of chips and wood residues. From available data, it would appear that, although Europe's domestic requirements of pulpwood are expected to expand in 1968, the total volume that consists of wood residues, chips and particles may be less than in 1967.

57. In Canada requirements are estimated to rise in 1968 compared with 1967 by 3.1 million m³ to 60.0 million m³ and in the United States by 2.4 million m³ to 120.5 million m³. The Canadian estimate for 1968 is unchanged from that forecast at last year's session and that of the United States is only marginally higher.

58. Indigenous availabilities of pulpwood in Europe (excluding the USSR) rose by as much as 10% in 1967, or almost double the rate of increase of apparent consumption, due partly to the salvaging of storm-damaged timber in central Europe and unusually favourable weather conditions for logging in the 1966/67 felling season in Sweden. For 1968, it is estimated that indigenous availabilities will decline slightly. Sweden and western Germany, between them, estimate a combined decrease in availabilities of 2.5 million m³, while their domestic requirements are expected to rise by 1.7 million m³, so that in 1968 Europe's net availabilities (domestic availabilities plus net imports) are estimated to be more in line with domestic requirements than was the case in 1967.

59. Total indigenous availabilities of pulpwood in Canada in 1968 are estimated at 68.0 million m³, somewhat higher than last year's estimate and nearly 4.0 million m³ (6%) higher than in 1967. It is estimated that 26½% of the 1968 total will be chips and wood residues as against 24½% of the 1967 total. Indigenous availabilities are also expected to increase in the United States to a total of 119.5 million m³ in 1968 or 4.7 million m³ (4%) above the total for last year. In this case 29½% of the total estimate is accounted for by chips and residues, the same proportion as in 1967.

60. European imports of pulpwood (all assortments) are estimated to decline by 1.8% in 1968, higher imports by Italy, Austria, the United Kingdom and Norway being rather more than offset by declines in western Germany, Finland and France.
61. Almost the whole of the drop of one and a quarter million m³ in Europe's exports in 1968 compared to 1967 is due to an estimated decrease of 23% in the exports of the USSR. For the rest of Europe it is estimated that total exports in 1968 will be virtually unchanged from the total of 6.5 million m³ in 1967.
62. After the deceleration in growth rate of Europe's output of products derived from pulpwood (woodpulp, fibreboard and particle board) between 1964 and 1967, the Committee noted that an improvement appeared to be taking place in the current year and that, with the renewed upward trend of overall economic activity in western Europe expected to continue, further growth in production was foreseen for 1969. This would help to raise capacity operating ratios, although it seemed unlikely that the considerable capacity surpluses in these industries in recent years could be eliminated entirely.
63. Europe's (excluding the USSR) requirements of pulpwood in 1969 are expected to grow at a rather faster rate than in 1968. Whilst Norway envisages no expansion in 1969, the increased requirements by Sweden and Finland account for about a half of Europe's total estimated rise of 5.0 million m³ to 119.8 million m³. Almost all other European countries indicate increased requirements in 1969 compared with estimated for the current year.
64. Import requirements of pulpwood for Europe in 1969 and export prospects (including those of the USSR) are in both cases only slightly less than the totals of imports and exports respectively, estimated for the current year.
65. The Committee noted that Europe's net availabilities of pulpwood estimated for 1969 were 119.5 million m³ and that domestic requirements were 119.8 million m³. It concluded that the closeness of the two estimates indicated that the improvement in the demand/supply balance of pulpwood that was taking place in the current year should be consolidated in 1969.

(ii) Pitprops

66. Totals of Europe's indigenous availabilities, trade and domestic requirements of pitprops in 1967 and the Timber Committee's estimates for 1968 and 1969 are shown below:

European totals for pitprops in 1967 and estimates for 1968 and 1969
(million m³)

Year	Indigenous production a/		Imports		Exports		Domestic requirements a/	
	Volume	% change from previous year	Volume	% change from previous year	Volume	% change from previous year	Volume	% change from previous year
1967	10.29*	- 5.3%*	1.02	- 29.6%	1.31	- 29.2%	11.30*	- 6.8%*
1968	10.16	- 1.4%	0.83	- 18.9%	1.10	- 16.3%	10.67	- 5.6%
1969	9.94	- 2.2%	0.89 ^{b/}	+ 6.9%	1.02 ^{c/}	- 6.8%	10.47	- 1.9%

a/ Excluding the USSR.

b/ Import requirements.

c/ Export prospects.

67. Firm estimates are not available from a few countries, but it appears that in Europe (excluding the USSR) the long-term downward tendency in production and consumption of pitprops is continuing in 1968. The rate of decrease may, however, be less than the average of recent years, and the available estimates for 1969 suggest that the fall next year may also be quite small. Production in Poland, the leading European producer and consumer, is estimated to rise slightly between 1967 and 1969 and in the United Kingdom to remain more or less constant.

68. Following the steep fall in trade in 1967, a further considerable decline is expected in 1968, the main change in exports being an estimated decline of 21% in those of the USSR. Imports are estimated to decline by 9% in Hungary, which may nevertheless account for about 60% of the region's imports in the current year. Arrivals in the United Kingdom are expected to drop by 38% from the 1967 level, providing a marked contrast with the anticipated unchanged volume of indigenous production noted above.

69. A further decrease in European exports of pitprops is foreseen in 1969, although it is expected to be at a slower rate than in the current year. Shipments from the USSR are estimated to be only slightly below the 1968 estimated volume of 720,000 m³. The 7% rise in estimated imports in 1969 is due to a planned import of pitprops into Bulgaria of 118,000 m³, compared with relatively small quantities in 1967 and estimated for 1968. Further decreases are expected in the imports of Hungary and western Germany, but those of the United Kingdom are estimated to level out at the 1968 volume.

(iii) Prices for pulpwood and pitprops

70. As noted in the report of the Committee's last session, over-availability of roundwood in some countries arising out of the storm damage to forests in 1966/67 accentuated the downward trend in pulpwood prices during 1967. Statements from several delegations at the current session reported a further decline in prices in the first half of 1968. There were indications, however, that the gradual improvement in the demand/supply balance had checked the downward drift in prices for coniferous pulpwood, while some countries reported upward adjustments in price levels for broadleaved pulpwood in 1968. Following the Finnish Government's decision to reduce the export levy on certain forest products, agreement was reached between the forest owners and forest industries on an average price increase for delivered pulpwood of 10-15% over the level in the 1967/68 felling season. This reversed the downward trend in prices over the past three years.

71. Pitprop prices generally followed the downward trend for small-sized roundwood in 1967 and the first half of 1968, although in the United Kingdom home market no significant basic changes in prices have taken place, in spite of the increased availability of roundwood from storm-damaged forests in Scotland.

(e) Panel products

(i) Plywood and blockboards

72. Totals of Europe's production; trade and domestic requirements of plywoods (including blockboards) in 1967 and the Timber Committee's estimates for 1968 and 1969 are shown below:

European totals for plywood and blockboards in 1967 and estimates for 1968 and 1969
(million m³)

Year	Production ^{a/}		Imports		Exports		Domestic requirements ^{a/}	
	Volume	% change from previous year	Volume	% change from previous year	Volume	% change from previous year	Volume	% change from previous year
1967	3.46	+ 1.4%	1.59	+21.6%	1.14	+ 7.1%	3.96	+ 6.7% ^{d/}
1968	3.59	+ 3.9%	1.70	+ 6.5%	1.24	+ 9.4%	4.24	+ 1.2%
1969	3.71	+ 3.2%	1.71 ^{b/}	+ 0.6%	1.31 ^{c/}	+ 5.1%	4.32	+ 1.9%

a/ Excluding USSR

b/ Import requirements

c/ Export prospects

d/ Change in apparent consumption (roughly equal to domestic requirements)

73. Production of plywoods in Europe (excluding the USSR) is estimated to expand faster in 1968 and 1969 than in 1967. Over the two-year period 1967 to 1969, the largest increases are expected in Italy, Finland, Spain and France. Growth in European countries' domestic requirements is estimated to rise by 7% in 1968, but the growth rate may slow down in 1969.

74. After strong expansion in 1967, Europe's trade in plywoods is estimated to show further substantial growth in 1968, although in contrast to the trends in 1967, exports may increase faster than imports, partly due to a renewed upward trend in exports to the United States, where total plywood imports are estimated to increase by 36% in 1968 1.45 million m³. Europe's plywood exports and imports are expected to expand further in 1969, although at a slower rate than in 1968.

(ii) Particle board (including flaxboard)

75. Totals of Europe's production, trade and domestic requirements of particle board (including flaxboard) in 1967, and the Committee's estimates for 1968 and 1969 are shown below:

European totals for particle board (including flaxboard) in 1967
and estimates for 1968 and 1969

(million m.t.)

Year	Production <u>a/</u>		Imports		Exports		Domestic requirements <u>a/</u>	
	Volume	% change from previous year	Volume	% change from previous year	Volume	% change from previous year	Volume	% change from previous year
1967	4.66	+ 9.7%	0.73	+15.3%	0.75	+16.4%	4.66	+ 9.5% <u>d/</u>
1968	5.49	+17.8%	0.84	+15.0%	0.86	+14.2%	5.51	+18.2%
1969	6.04	+10.0%	0.89 <u>b/</u>	+ 5.2%	0.95 <u>c/</u>	+10.1%	6.00	+ 8.8%

a/ Excluding the USSR

b/ Import requirements

c/ Export prospects

d/ Change in apparent consumption (roughly equal to domestic requirements)

76. Production and apparant consumption of particle board in Europe (excluding the USSR) rose by nearly 10% in 1967 over 1966 and although this rate of growth was lower than in previous years, it was nonetheless higher than that recorded by any other sector of forest products. In 1968, the estimates point to a notable acceleration in growth, with both production and domestic requirements expanding by about 18% over the 1967 total to approximately 5.5 million tons in both cases. Further substantial growth is predicted for 1969, although the 1968 rate of expansion is not expected to be maintained. All countries expect to share in the growth of domestic requirements between 1967 and 1969, particularly large increases being estimated by western Germany, the world's leading consumer, France and the United Kingdom.

77. Trade in particle board in Europe, including the USSR, is estimated to increase in 1968 at a similar rate to that recorded in 1967 over 1966. Particularly strong growth is estimated in the imports of the United Kingdom, which in 1968 may become the leading importing country, followed by the Netherlands. On the other hand, imports by western Germany are estimated to fall sharply in 1968 for the second year in succession. A major expansion in Finland's exports is the most notable change in Europe's export estimates for 1968. Expansion of European exports and imports is expected to continue in 1969, an interesting feature being that western Germany, with a further reduction in imports and increase in exports, will become a net exporter of particle board for the first time in the present decade.

(iii) Fibreboard

78. Totals of Europe's production, trade and domestic requirements of fibreboard in 1967, and the Committee's estimates for 1968 and 1969 are shown below:

European totals for fibreboard in 1967 and estimates
for 1968 and 1969
(million m.t.)

Year	<u>Production</u> ^{a/}		Imports		Exports		<u>Domestic requirements</u> ^{a/}	
	Volume	% change from previous year	Volume	% change from previous year	Volume	% change from previous year	Volume	% change from previous year
1967	2.57	+ 2.1%	0.84	+ 15.7%	0.98	+ 9.6%	2.49	+ 4.2% ^{c/}
1968	2.74	+ 6.6%	0.92	+ 9.1%	1.08	+ 10.3%	2.67	+ 7.4%
1969	2.87	+ 4.8%	0.97 ^{a/}	+ 5.7%	1.14 ^{b/}	+ 4.8%	2.79	+ 4.5%

^{a/} Import requirements

^{b/} Export prospects

^{c/} Change in apparent consumption (roughly equal to domestic requirements)

79. After resuming an upward trend in 1967, growth in production and domestic requirements in Europe, excluding the USSR, is estimated to accelerate in 1968 to reach totals of 2.74 and 2.67 million m³ respectively. Further expansion is predicted in 1969 at a rate somewhat below that expected for the current year. Over the period 1967 to 1969, substantial increases in output are foreseen in Sweden, the leading European producer, France, Finland, while the only large producer expecting a fall in output is western Germany, which is mirrored by a decline in domestic requirements.

80. The sharp recovery in Europe's trade in fibreboard in 1967 is expected to be followed by further substantial growth in 1968 and 1969, although, according to the Committee's estimates, the rate of growth may be somewhat reduced next year. Between 1967 and 1969, the largest increases in the volume of exports are expected in Sweden, Finland and Poland and relatively fast growth in Austria and Romania. Substantial growth in imports is foreseen in the United Kingdom, although an estimated 12 $\frac{1}{2}$ % increase between 1967 and 1968 is expected to be followed by slower expansion next year. Poland's imports are estimated to rise strongly over the two-year period and it may have become a net importer by 1969.

(iv) Prices for panel products

81. Although the underlying tone of the European market for panel products has shown an improvement in 1968 and prices for plywood have been reasonably firm, those for particle board and fibreboard are still generally at what producers consider to be unremuneratively low levels. The downward trend in domestic prices for particle board in western Germany appeared to level out in April, and even to rise slightly in the following months. A similar trend was observed for okoumé plywood in France. Prices of imported plywood in western Germany have remained almost constant, but those for imported fibreboard and particle board have tended to fall below the end-1967 levels. Prices for fibreboard in Sweden have generally remained firm.

82. Export prices for Finnish (birch) plywood have continued to rise steadily during the current year. In the United States, the recovery in softwood plywood prices that began in the latter half of 1967 persisted in the early months of 1968 and the average wholesale price for the first five months of this year was 19% above that for the corresponding months of 1967.

83. In the United Kingdom it is difficult to make comparisons of prices of imported panel products as between 1968 and 1967 because of the effects of the devaluation of sterling last November. At that time, however, the volume of landed stocks and forward contracts which had been concluded prior to devaluation, notably those for plywood, was adequate to meet domestic consumption needs well into the first half of 1968. Nevertheless by July this year the average c.i.f. cost of arrivals showed big advances compared with those a year ago, but in most instances they did not reflect the full increase of 16.7% that could have taken place as a result of devaluation.

(f) Biennial survey of the production capacity of, and raw material consumption by the wood-based panel products industries

84. The Committee considered the findings of the draft biennial survey of the production capacity of, and raw material consumption by, the wood-based panel products industries (TIM/Working Paper No. 126). It noted that information from the Committee's survey will be incorporated in the world survey requested by the FAO Committee on Wood-based Panel Products for submission to its second session, to be held in Rome from 6 to 8 November 1968.

85. The Committee noted that in the fibreboard sector in Europe (excluding the USSR), the slow but steady growth rate in production capacity maintained between 1964 and 1967 is expected to continue to 1969. In the particle board sector, an average annual growth rate in production capacity of approximately 10% is indicated between 1964 and 1969. The non-wood-based particle board sector, however, will not participate in this expansion in production capacity; in fact, the production of flaxboard is expected to decline between 1966 and 1969, due to problems in obtaining sufficient raw materials. In the plywood and blockboards sector, it is expected that growth will average about 4% per annum between 1967 and 1969. It was pointed out that direct comparisons between capacity and production statistics for panel products could be misleading, particularly with regard to compressed fibreboard.

86. The Committee noted that the long-term trend towards an increasing proportion of industrial wood residues in total raw material input of the fibreboard industry appeared to be slowing down somewhat, with industrial wood residues accounting for about 68% of total input in European reporting countries in 1967. Within the particle board sector, the proportionate share of roundwood in total raw material input had increased only marginally after 1964 to 74% in the reporting countries in 1967. In the plywood and veneer sheet industries, broadleaved species predominate in Europe, while coniferous species account for the major part of raw material input of the plywood industry in North America.

87. The Committee strongly urged countries that had as yet supplied incomplete data to forward the missing information to the Secretariat by 15 November. It requested the Secretariat, after it had collated all available data, to publish the results of the survey as a Supplement to the Timber Bulletin for Europe.

Joint Session of the ECE Timber Committee and the FAO European Forestry Commission
(Item 13 of the Agenda)

Introduction

88. The Joint Session was held in Geneva from 9 to 11 October 1968. It was attended by delegates from Austria, Belgium, Bulgaria, Byelorussian SSR, Canada, Cyprus, Czechoslovakia, Denmark, Federal Republic of Germany, Finland, France, Greece, Hungary, Ireland, Israel, Italy, Netherlands, Norway, Poland, Portugal, Romania, Spain, Sweden, Switzerland, Ukrainian SSR, USSR, United Kingdom, United States of America and Yugoslavia. A representative of the International Labour Organisation (ILO) also attended. The International Confederation of Free Trade Unions (ICFTU), the International Organization of Employers, the International Organization for Standardization (ISO), the European Confederation of Agriculture (CEA), the International Union for the Conservation of Nature and Natural Resources (IUCN), non-governmental organizations, sent representatives. Staff officials of the Commission of the European Economic Communities (EEC) attended at the invitation of the Secretariat (for list of delegates see E/ECE/TIM/91,FO: EFC/68-13).

84. The Joint Session was addressed by Mr. J. Stanovnik, the Executive Secretary of the ECE and by Mr. P. Lamartine Yates, the FAO Regional Representative for Europe. Both referred to the fruitful collaboration between the Timber Committee and the European Forestry Commission in the past and expressed the hope that this collaboration could be even intensified in the future. Mr. Stanovnik explained the steps being taken to streamline the work of the Commission and its subsidiary bodies in pursuance of Commission Resolution 3 (XXIII), in which connexion he considered that the long-term programme of work of the Timber Committee appeared to fulfil the wishes of the Commission.

Adoption of the Agenda (Item 1 of the Agenda of the Joint Session)

90. The Provisional Agenda (E/ECE/TIM/89, FO: EFC/68-1), presented by the Secretariat, was adopted.

Election of officers (Item 2 of the Agenda of the Joint Session)

91. The Joint Session was presided over by the respective Chairmen of the two bodies, Mr. G.E. Hampson (United Kingdom), Chairman of the Timber Committee, and Mr. F. Tomulescu (Romania), Chairman of the European Forestry Commission.

Interim Review of the projections made in the FAO/ECE Study "European Timber Trends and Prospects, A new Appraisal, 1950-1975" (Item 3 of the Agenda of the Joint Session)

92. The Secretariat presented to the Joint Session a draft of the Interim Review of the Study "European Timber Trends and Prospects, A new Appraisal, 1950-1975" (TIM/Working Paper No. 127, FO: EFC/68-2).

93. The Interim Review showed that developments in Europe's forest products economy between 1960, the base year for the Study's projections, and the present time had, broadly speaking, followed the lines forecast in the Study. A detailed examination of trends to 1975, however, suggested that the Study's projections called for tentative revisions. Thus, it is now estimated that European consumption of forest products in 1975 may reach 371 million m^3 (wood raw material equivalent) or slightly higher (by some 6 million m^3) than was envisaged in the Study. Sawwood consumption is expected to be slightly higher, while for other main product groups the estimates remain essentially unchanged, in aggregate, with some adjustments within each group.

94. Similarly, the trend to date in Europe's total domestic supply of industrial roundwood has conformed to the Study's estimates. But the Study estimates of roundwood supply in 1975, which were based on countries' own felling forecasts, now require upward revision - by about 10% or some 26 million m^3 to 296 million m^3 - with northern Europe accounting for more than half of the increase. It is also now estimated that an additional 4 million m^3 of residues, over and above those foreseen in the Study, will be put to industrial use.

95. Thus, the shortfall between Europe's consumption of industrial forest products and domestic supply is expected to expand somewhat more slowly than foreseen by the Study, and is now expected to reach 46 million m^3 by 1975 - a figure that lies closer to the lower than to the higher estimated balance envisaged in the Study. This shortfall will, according to the extrapolation of trends included in the Interim Review, continue to grow and may reach 56 million m^3 by 1980. It was pointed out that the figures quoted above may change slightly when the Interim Review is revised.

96. The Joint Session warmly commended the Secretariat on the draft of the Interim Review. Although it recognized that this was essentially an updating and extension of an earlier study and was not intended as a major reappraisal, it was considered that its conclusions regarding future prospects appeared to be soundly based and provided valuable information on which to formulate forestry, industry and trade policy decisions. The value of periodic revisions of long-term studies, supplemented by detailed sector studies, such as those included in the Timber Committee's long-term programme of work, was fully recognized.

97. Attention was drawn to the fact that, in terms of the forestry production cycle, 15 years was relatively short. It was suggested that an attempt should be made to extend the projections as far as the year 2000.

98. The Joint Session invited delegations to forward their observations on the draft to the Secretariat by 30 November 1968. It recommended that the Review should be revised and published as soon as possible thereafter.

Activities of subsidiary bodies (Item 4 of the Agenda of the Joint Session)

(a) Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers: report of the seventh session

99. The Joint Session took note of, and unanimously approved, the report of the seventh session of the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers (FAO/ECE/LOG/228), which was introduced by its Chairman, Mr. K.I. Voronitsin (USSR). At the invitation of the Government of Poland, the session was held in Warsaw from 10 to 14 June 1968, and it included in its programme of work a Symposium on the mechanization of harvesting of small-sized wood and logging residues, and a study tour in Poland.

100. Thanks were expressed to the Government of Poland for the excellent organization of the session and for the extremely interesting and useful study tour.

101. Appreciation was expressed both of the work carried out so far by the Joint Committee in the various fields of its activity, and of its programme of work for the period 1968-1970.

102. The Joint Session recorded a suggestion made by one delegation to take into consideration in the work of the Joint Committee the interrelationship between silvicultural aspects and the planning of forestry operations.

103. The Joint Session noted with appreciation the invitation of the Government of the Federal Republic of Germany to hold the Joint Committee's eighth session in that country in 1970, including a Symposium and a study tour, and to convene in 1969 a Symposium on Ergonomics Applied to Forestry.

104. The United Kingdom delegation called the attention of delegates to the large forestry exhibition and a study tour of the Study Group of Mechanization of Forest Work, which will be organized in Scotland on the occasion of the Jubilee of the United Kingdom Forestry Commission in June 1969. Hope was expressed on behalf of the latter that as many delegates as possible would visit the exhibition.

(b) Joint FAO/ECE Working Party on Forest and Forest Products Statistics: report of the seventh session

105. Mr. L. Velay (France), Chairman of the Joint FAO/ECE Working Party on Forest and Forest Products Statistics, presented to the Joint Session the report of the seventh session of the Working Party (FAO/ECE/STATS/86). Particular reference was made to

the work of the Group of Experts on Capital Formation in Forestry and the need for further work in the evaluation of indirect forest benefits, in which the Group of Experts would seek liaison with the section of the International Union of Forest Research Organizations (IUFRO) dealing with national income accounting in forestry. It was stressed by delegates that this work should be directed towards practical applications of theoretical developments.

106. The Joint Session noted the progress of the Working Party on the concepts of "potential cut" and "felling forecasts" and that the definition of pulpwood still gave rise to some difficulties in application.

107. The Joint Session supported the proposed approach of giving small ad hoc meetings of experts exploratory and preparatory responsibilities prior to meetings of the Working Party. The need for work on (a) examination and development of economic indicators in forestry, (b) use of computers in forestry work, especially resource appraisals, and (c) forest fire damage appraisals, was noted.

Survey of the storm damage to forests, winter and spring 1966/67 (Item 5 of the Agenda of the Joint Session)

108. The Joint Session received a report on the repercussions of the storm damage to forests in the winter and spring of 1966/67 (TIM/Working Paper No.128, FO: EFC/68-3). It noted that the damage had been even more widespread than originally estimated. The market situation was becoming stabilized during the current year, although roundwood prices, particularly those for coniferous timber, were still well below pre-disaster levels in the affected countries.

109. The Joint Session noted that valuable experience had been gained in the methods of dealing with such catastrophes; for example, it had acted as a spur to develop the productivity of logging methods. Such experience had already proved helpful to the United Kingdom, which suffered a similar disaster in Scotland at the beginning of 1968.

110. The suggestion was welcomed by the Joint Session that information on the methods used to deal with the damaged timber, and their effectiveness, should be compiled and published, for reference in the event of a similar disaster at a later date. It therefore requested the Secretariat to obtain from countries any further information that would become available in the near future and to complete its survey for publication as a Supplement to the Timber Bulletin for Europe.

Sawlog grading (Item 6 of the Agenda of the Joint Session)

111. The Joint Session took note of a report by Mr. V. Heiskanen (Finland) on the progress made in the investigation into the possibilities of introducing a uniform

system of grading of coniferous sawlogs at an all-European level (TIM/Working Paper No. 129, FO: EFC/68-4). It was informed that an abstract had been prepared of the defects of sawlogs which could form the basis for the next stage of the investigation. 112. Nevertheless, attention was drawn to the complexity of the technical problems which would be encountered in establishing a grading system that would be both easy to apply in practice and universally acceptable.

113. The Joint Session was informed of work in this field currently undertaken by other institutions at different international levels, in particular by ISO and EEC.

114. The Joint Session deferred consideration of the proposal to convene an ad hoc meeting of experts to prepare a draft for a uniform sawlog grading system until after the Secretariat, in collaboration with its appointed expert, had explored with the interested parties the most suitable way of co-ordinating future work in this field. It requested the Secretariat to inform the next session of the Timber Committee of the results of its enquiries.

115. The Joint Session further expressed its warm appreciation of the work carried out by Mr. Heiskanen so far in this investigation.

Seminar on a subject of interest to forestry and forest industry (Item 7 of the Agenda of the Joint Session)

116. Papers were presented by Messrs. Tomulescu, Dumitrescu and Carcea (Romania), Mr. Margaropoulos (Greece), Mr. Velay (France) and Messrs. von Sydow and Hamilton (Sweden) (TIM/Working Paper No.130, FO: EFC/68-5). The Joint Session expressed its deep appreciation to the authors.

117. The papers drew attention to the problems which forestry and forest industries in Europe were now facing. Production costs per unit volume of wood harvested have tended to rise, despite mechanization and the rationalization of forest operations. Prices for roundwood generally have shown little upward trend or have even declined, and, consequently, the net returns to forest owners have shrunk, even to negative values in some localities and for some categories of roundwood.

118. The critical question now facing the European forest and forest industry sector is: how much industrial wood can European forestry supply profitably at prices which industry can afford to pay. The frame within which this question has to be answered is distorted in many European countries by two considerations. The cost of wood production is frequently inflated by the obligation to produce non-timber values: watershed control, soil protection, recreation, amenities and support for the rural economy. These are values rendered by the forest to the community. They should in principle be paid for out of the public purse.

119. The other consideration is that forest industries in some countries are inefficient and for their survival depend on wood prices which are too low to be remunerative to the forest owner.

120. Most European forest authorities, both state and private, are radically revising their approach to silviculture and management, seeking to apply advances in technology and in managerial science. Thus the trend is to step up inputs on the most favourable sites, where more intensive forestry gives promise of economic return, and to move towards less intensive forestry on inferior sites. It is increasingly recognized that national production goals must today be formulated within the international context, and that this requires careful study of international marginal cost/return relations.

121. Economic considerations, coupled with rapidly advancing technology, today render imperative co-ordinated planning of all phases of the forestry and forest industry sector, from the planting and growing of wood to the marketing of the processed products. The road to effective co-ordinated planning will differ from country to country, but a prerequisite is a continuous dialogue at the national level between forestry and forest industry, leading to a mutual comprehension of each others' problems. In some countries notable successes have already been achieved; in others, this dialogue has scarcely begun. The Joint Session considered that there was much to be gained from the international exchange of national experience, and called upon the Secretariat and officers of the ECE Timber Committee and the FAO European Forestry Commission to devise further opportunities for international co-operation in this area.

Future co-operation between the ECE Timber Committee and the FAO European Forestry Commission (Item 8 of the Agenda of the Joint Session)

122. The Joint Session considered the possibilities of future co-operation between the Timber Committee and the European Forestry Commission. It felt that in the light of the discussions on the Interim Review under item 3 of its Agenda, and of the Seminar on forestry-forest industry relations under item 7, the Symposium on "Co-ordination of harvesting, transport and industrial processing of wood raw materials", scheduled for 1971/72 in the Timber Committee's long-term programme of work could well be amplified to include silviculture and management, and that such a Symposium be organized jointly with the European Forestry Commission. In view of the importance and complexity of the problem it was agreed to convene, prior to the Symposium, an ad hoc preparatory meeting of experts to identify the most important aspects and problems that should be included in it.

123. The Joint Session took note of the proposal by the European Confederation of Agriculture (CEA) for a European Timber Convention to protect the interests of forest owners in case of natural disasters, such as the storm damage to forests in the winter and spring of 1966/67, with the intention of alleviating excessive fluctuations in the price of roundwood. It was felt that such a proposal might be against the trend towards the liberalization of trade in forest products and, in principle, beyond the mandate and responsibilities of both the Timber Committee and the European Forestry Commission. The Joint Session was of the opinion, however, that certain aspects of the problem could be referred to the European Forestry Commission for further consideration, and that it might be advisable to convene an ad hoc meeting of experts under the auspices of the latter body to study the principal economic problems that such disasters can create for forest owners, and that the results of such a meeting be brought to the attention of the competent authorities in member countries for possible action within the framework of the appropriate international organizations.

Other business (Item 14 of the Agenda)

124. The Committee had no further business to discuss.

Date of the next session (Item 15 of the Agenda)

125. The Committee requested the Secretariat to reserve, if possible, 6 to 10 October 1969 for its next session.

Films

126. The Committee thanked the delegation of Canada for providing the films "The Second Harvest" and "The Living Blueprint" which were shown during the session.

EXPORTS OF SAW SOFTWOOD
(including boxboards)

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

TABLEAU No.2

Exporting countries	Exports - Exportations		Export prospects Prévisions d'exportations		Exports - Exportations		Export prospects Prévisions d'exportations		Pays exportateurs
	1967	1968	1967	1968	1967	1968	1967	1968	
	Estimates		Estimations		Estimates		Estimations		
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)		
		1000 standards		1000 m3(s)					
Austria	562	610	621	2 621	2 850	2 900	Autriche		
Belgium-Luxembourg	9	10	10	44	50	50	Belgique-Luxembourg		
Bulgaria	5	6	5	25	30	25	Bulgarie		
Czechoslovakia	157	139	128	735	650	600	Tchécoslovaquie		
Finland	731	820	850	3 417	3 831	3 971	Finlande		
France	50	51	56	235	240	260	France		
Hungary	54	30	17	254	140	79	Hongrie		
Norway	12	20	20	56	93	93	Norvège		
Poland	159	153	139	741	715	650	Pologne		
Portugal	76	77	77	358	360	360	Portugal		
Romania	338	257	235*	1 581	1 200	1 100*	Roumanie		
Sweden	1 186	1 300	1 252	2 540	6 074	5 723	Suède		
USSR	1 593	1 670	1 670	7 443	7 800	7 800	URSS		
Western Germany	58	75	75	273	350	350	Allemagne occidentale		
Yugoslavia	43	47	47	200	220	220	Yougoslavie		
Other a/	43	50*	50*	200	234*	234*	Autres a/		
TOTAL EUROPE	5 076	5 315	5 225	23 723	24 837	24 415	TOTAL EUROPE		
Canada (To Europe)	506	450	500	2 366	2 100	2 335	Canada (Vers l'Europe)		
United States "	122	165	165	570	770	770	Etats-Unis "		
Other sources "	95*	110*	110*	444	515*	515*	Autres Provenances "		
GRAND TOTAL	5 799	6 040	6 000	27 103	28 222	28 035	TOTAL GENERAL		
IMPORTS	5 761	6 037	5 841	26 919	28 199	27 279	IMPORTATIONS		
BALANCE	738	+ 3	+ 159	+ 184	+ 23	+ 756	BALANCE		
Canada (Total)	3 298	3 352	3 510	15 411	15 695	16 400	Canada (Total)		
United States "	490	590	600	2 289	2 756	2 803	Etats-Unis "		

* = Estimated figure
.. = Not available
- = Nil or less than half a unit
a/ Denmark, Eastern Germany, Ireland, Italy, Netherlands, Spain, Switzerland, Turkey
b/ Allemagne orientale, Danemark, Espagne, Irlande, Italie, Pays-Bas, Suisse, Turquie.
* = Donnée estimée
.. = Non disponible
- = Néant ou moins d'une demi-unité

TABLE No. 3

SAWWOOD

1968 and 1969: estimates

SCIAGES

1968 et 1969: estimations

TABLEAU No. 3

Country	SAWN SOFTWOOD - SCIAGES RESINEUX										SAWN HARDWOOD - SCIAGES FEUILLEUS										Pays
	Production					Domestic requirements-Besoins Nationaux					Production					Domestic requirements Besoins nationaux					
	1000 stds.					1000 m ³ (s)					1000 m ³ (s)					1000 m ³ (s)					
	1967	1968	1969	1967	1968	1969	1967	1968	1969	1967	1968	1969	1967	1968	1969	1967	1968	1969			
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)	(18)	(19)	(20)		
Austria	983	963	1 001	4 592	4 500	4 679	393	382	396	1 836	1 786	1 850	287	216	201	180	200	205	Autriche		
Belgium	70	70	70	325	325	325	255	235	257	1 190	1 100	1 200	285	285	285	430	435	435	Belgique		
Luxembourg	8	10*	10*	38	47*	47*	8*	10*	10*	38*	47*	47*	39	40*	40*	39*	40*	40*	Luxembourg		
Bulgaria	171	170*	175*	799	795*	795*	188	190*	190*	878*	888*	888*	730*	700*	700*	722*	700*	700*	Bulgarie		
Czechoslovakia	661	654	633	3 091	3 057	2 958	535	547	537	2 500	2 557	2 508	610	677	726	619	662	696	Tchécoslovaquie		
Denmark	98*	100*	100*	460*	467*	467*	329*	300*	330*	1 540*	1 400*	1 540*	380*	380*	380*	373*	370*	370*	Danemark		
Eastern Germany	303*	300*	300*	1 415*	1 402*	1 402*	563	550*	540*	2 629	2 570*	2 523*	354*	355*	355*	450	450*	450*	Allemagne orientale		
Finland	1 215	1 320	1 360	5 676	6 167	6 354	470	500	520	2 196	2 336	2 429	112	117	120	50	52	55	Finlande		
France	1 115*	1 115*	1 115*	5 210*	5 210*	5 210*	1 390*	1 390*	1 390*	6 495*	6 495*	6 495*	3 031*	3 030*	3 030*	2 900*	2 900*	2 900*	France		
Greece	25	26	27	115	120	125	116	113	112	543	530	525	80	85	90	126	136	144	Grèce		
Hungary	78	75	86	363	350	402	234	275	304	1 093	1 285	1 420	519	530	580	558	560	580	Hongrie		
Ireland	7	7*	7*	32	32*	32*	67	75*	75*	313	350*	350*	20	20*	20*	59	60*	60*	Irlande		
Italy	130	160	150	606	748	701	795	860	825	3 714	4 018	3 854	1 431	1 115	1 165	1 935	1 550	1 600	Italie		
Netherlands	18	18	18	85	85	85	545	573	584	2 549	2 676	2 730	237	240	250	407	429	448	Pays-Bas		
Norway	355	345	370	1 659	1 612	1 729	397	375	390	1 855	1 752	1 822	10	10	10	67	85	85	Norvège		
Poland	1 275	1 312	1 312	5 959	6 130	6 130	1 143	1 195	1 211	5 340	5 585	5 660	947	955	955	948	963	964	Pologne		
Portugal	300	321	321	1 400	1 500	1 500	238	257	268	1 110	1 200	1 250	120	130	130	140	150	150	Portugal		
Romania	628	574	550*	2 934	2 682	2 570*	308	305	300*	1 439	1 424	1 402*	2 374	2 501	2 600*	1 755	1 817	1 850	Roumanie		
Spain	266	262	278	1 245	1 225	1 300	384	375	379	1 795	1 750	1 770	643	650	660	810	800	820	Espagne		
Sweden	1 993	2 150	2 100	9 314	10 045	9 811	825	870	900	3 854	4 065	4 205	235	225	225	290	310	310	Suède		
Switzerland	225	250	214	1 050	1 170	1 000	273	282	270	1 275	1 320	1 260	104	120	120	188	182	180	Suisse		
Turkey	320	349	353	1 493	1 633	1 650	320	342	342	1 493	1 600	1 600	418	485	500	418	443	445	Turquie		
United Kingdom	53	52	54	246	243	252	1 889	1 900	1 825	8 825	8 877	8 526	555	364	380	1 246	1 250	1 260	Royaume-Uni		
Western Germany	1 475	1 498	1 498	6 891	7 000	7 000	1 991	2 022	2 001	9 302	9 450	9 350	1 862	1 900	1 900	1 936	1 930	1 920	Allemagne occidentale		
Yugoslavia	337	353	364	1 576	1 650	1 700	307	317	321	1 436	1 480	1 500	1 328	1 330	1 400	800	810	855	Yougoslavie		
TOTAL EUROPE	12 109	12 454	12 461	56 574	58 195	58 224	13 963	14 240	14 277	65 238	66 542	66 704	16 711	16 460	16 822	17 446	17 284	17 522	TOTAL EUROPE		
USSR	19 827			92 650									16 350						URSS		
Canada	4 976	5 316	5 505	23 254	24 840	25 725	2 012	2 070	2 122	9 401	9 675	9 915	1 197	1 135	1 205	1 004	1 000	1 075	Canada		
United States	13 842	14 530	14 700	64 288	67 884	68 678	15 908	16 460	16 700	74 322	76 901	78 022	16 957	16 750	17 000	15 385	17 220	17 470	Etats-Unis		

a/ Includes sleepers

a/ Y compris les traverses

TABLEAU No.4
IMPORTATIONS DE SCIAGES FEUILLUS
1000 m³ (s)

IMPORTS OF SAW HARDWOOD
1000 m³ (s)

Country	1967										1968										1969 ^{a/}										Pays
	Actual Réelles					Estimates					Estimates					Estimates					1969 ^{a/}					TOTAL					
	Temperate zone wood Essences des régions tempérées					Temperate zone wood Essences des régions tempérées					Temperate zone wood Essences des régions tempérées					Temperate zone wood Essences des régions tempérées					Tropical wood Essences tropicales										
	Oak Chêne	Beech Hêtre	Poplar Peuplier	Others Autres	Total	Oak Chêne	Beech Hêtre	Poplar Peuplier	Others Autres	Total	Oak Chêne	Beech Hêtre	Poplar Peuplier	Others Autres	Total	Oak Chêne	Beech Hêtre	Poplar Peuplier	Others Autres	Total	Oak Chêne	Beech Hêtre	Poplar Peuplier	Others Autres	Total						
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)	(18)	(19)	(20)	(21)	(22)	(23)	(24)	(25)	(26)	(27)					
Austria	32	4	36	15	1	17	33	5	38	15	1	16	32	5	37	Autriche													
Belgium-Luxemb.	74	75	149	70	15	5	10	100	80	180	70	15	5	10	100	80	180	Belgique-Luxemb.													
Czechoslovakia	14	14	14	7	7	1	1	8	8	8	7	7	1	1	8	8	8	Tchécoslovaquie													
Denmark	19*	46*	65	20*	20*	70*	70*	70*	45*	100*	65*	65*	20*	20*	70*	45*	100*	Danemark													
Eastern Germany	6*	31*	36	6	6	1	1	11	3	14	6	1	1	1	12	4	16	Allemagne orientale													
Finland	9	152	173	4	4	1	1	10	190	200	4	3	1	1	10	190	200	Finlande													
France	21	51	51	30	6	6	4	40	10	50	30	6	4	4	44	10	54	France													
Greece	58	58	58	1	1	1	1	1	1	1	1	1	1	1	1	1	1	Grèce													
Hungary	21*	17*	21	45	45	20*	20*	20*	20*	20*	45	45	20*	20*	20*	20*	20*	Hongrie													
Ireland	479	40	519	45	330	1	95	470	30	500	45	330	1	95	470	30	500	Irlande													
Italy	95	90	185	25	70	1	5	101	107	208	25	70	1	4	100	110	210	Italie													
Netherlands	38	20	58	25	25	25	25	25	25	70	25	25	25	25	45	25	70	Pays-Bas													
Norway	17	17	17	22	22	22	22	22	22	22	22	22	22	22	22	22	22	Norvège													
Poland	19	19	19	35	35	15	15	15	15	15	15	15	15	15	15	15	15	Pologne													
Portugal	15	15	15	52	52	15	15	15	15	15	15	15	15	15	15	15	15	Portugal													
Spain	22	18	40	50	50	15	15	15	15	15	15	15	15	15	15	15	15	Espagne													
Sweden	66	11	77	45	12	12	12	12	12	12	12	12	12	12	12	12	12	Suède													
Switzerland	62	11	73	45	12	12	12	12	12	12	12	12	12	12	12	12	12	Suisse													
United Kingdom	386	418	804	40	224	224	224	224	224	224	224	224	224	224	224	224	224	Royaume-Uni													
USSR	276*	276*	276*	101	101	101	101	101	101	101	101	101	101	101	101	101	101	URSS													
Western Germany	101	101	202	101	101	101	101	101	101	101	101	101	101	101	101	101	101	Allemagne occidentale													
Other ^{b/}	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	Autres													
TOTAL EUROPE	2 055	1 056	3 111	160	160	3	51	214	56	270	170	170	3	56	229	61	290	TOTAL EUROPE													
Canada	267	18	285	18	18	18	18	18	18	18	18	18	18	18	18	18	18	Canada													
United States	471	434	905	434	434	434	434	434	434	434	434	434	434	434	434	434	434	Etats-Unis													

a/ Import requirements.
b/ Iceland, Malta, Yugoslavia.

EXPORTS OF SAWN HARDWOOD
1000 m³(s)

EXPORTATIONS DE SCIAGES FEUILLUS
1000 m³(s)

TABLEAU No.5

TABLE No.5

Country	1967				1968										1969 ^{a/}										Pays
	Temperate zone wood Essences des régions tempérées		Tropical wood Essences tropicales		Estimates					Estimations					Temperate zone wood Essences des régions tempérées					Tropical wood Essences tropicales					
	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)	(18)	(19)						
Austria	51	51	-	51	6	19	(23...)	48	48	-	48	6	20	(23...)	...	49	-	49	Autriche						
Belgium-Luxembourg	15	15	12	27	5	6	1	20	30*	10	30	5	6	1	8	20*	10	30	Belgique-Luxembourg						
Bulgaria	25	-	-	25	-	-	-	-	-	-	-	-	-	-	-	-	-	-	Bulgarie						
Czechoslovakia	7	7	10*	7	8	13	1	23	30*	10*	30*	14	22	1	1	38	10*	38	Tchécoslovaquie						
Denmark	65*	65*	-	75	-	-	-	60	60	10*	60	-	-	-	-	65	-	65	Danemark						
Finland	64	64	-	64	-	-	-	60	60	10*	60	-	-	-	-	65	-	65	Finlande						
France	278	278	14	292	135	100	5	36	276	14	290	140	105	5	36	286	14	300	France						
Hungary	18	18	-	18	5	3	-	9	17	-	17	8	3	-	9	20	-	20	Hongrie						
Italy	11	11	3	14	1	2	1	1	5	7	15	1	2	1	1	15	-	15	Italie						
Netherlands	2	2	8	10	1	2	1	1	5	7	12	1	2	1	1	5	7	12	Pays-Bas						
Poland	16	16	-	16	16	-	-	-	16	-	16	16	-	-	-	16	-	16	Pologne						
Romania	726	726	-	726	20	670	-	-	690	-	690	-	-	-	-	690*	-	690*	Roumanie						
Sweden	12	12	1	13	2	10	3	(.....12)	15	-	15	-	3	(.....12)	...	15	-	15	Suède						
Switzerland	16	16	-	16	2	10	(.....3)	15	15	-	15	2	10	(.....3)	...	15	-	15	Suisse						
Turkey	6	6	-	6	2	30	-	10	12	-	12	44	44	-	44	44	-	44	Turquie						
Western Germany	119	119	10	129	90	380	-	50	125	12	137	95	400	-	50	125	15	140	Allemagne occidentale						
Yugoslavia	535	535	-	535	90	380	-	50	520	-	520	95	400	-	50	545	-	545	Yougoslavie						
Other ^{b/}	6	6	2	8	-	-	-	-	7*	3*	10*	-	-	-	-	7*	3*	10*	Autres ^{b/}						
TOTAL EUROPE	1 972	60	2 032	-	-	-	-	-	2 004	56	2 060	-	-	-	-	2 045	59	2 104	TOTAL EUROPE						
Canada	433	433	-	433	-	-	10	370	380	-	380	-	-	13	417	430	-	430	Canada						
United States	374	374	-	374	180	-	-	130	310	-	310	180	-	-	130	310	-	310	Etats Unis						
Japan	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	Japon						

a/ Export prospects

b/ Ireland, Norway, Portugal, Spain, United Kingdom.

a/ Prévisions d'exportations

b/ Espagne, Irlande, Norvège, Portugal, Royaume-Uni.

TABLEAU No. 6

IMPORTATIONS DE GRUMES DE FEUILLUS
1000 m³ (r)

IMPORTS OF HARDWOOD LOGS
1000 m³ (r)

Country	1967				1968				1969 ^{a/}				Pays					
	Actual Réelles				Estimates				Estimations									
	Temperate zone wood Essences des régions tempérées	Tropical wood Essences tropicales	TOTAL		Temperate zone wood Essences des régions tempérées		Tropical wood Essences tropicales	TOTAL		Temperate zone wood Essences des régions tempérées		Tropical wood Essences tropicales		TOTAL				
			Oak Chêne	Beech Hêtre	Poplar Peuplier	Others Autres		Oak Chêne	Beech Hêtre	Poplar Peuplier	Others Autres							
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)	(18)	(19)
Austria	6	25	31					5	25	30					5	25	30	Autriche
Belgium-Luxembourg	188	172	360	90	55	7	38	190	170	360	90	55	7	38	190	170	360	Belgique-Luxembourg
Bulgaria	14	58	72					14*	58*	72*					14*	58*	72*	Bulgarie
Czechoslovakia	64	10	74					54	9	63					54	9	63	Tchécoslovaquie
Denmark	37*	100*	137					35*	115*	150*					35*	115*	150*	Danemark
Eastern Germany	5*	27*	32*					5*	35*	40*					5*	35*	40*	Allemagne orientale
Finland	-	8	8	1	-	-	1	2	5	7	1	-	-	1	2	6	8	Finlande
France	52	1 299	1 351	1	1	20	10	32	1 318	1 350	1	1	25	12	39	1 311	1 350	France
Greece	5	48	53	10	5	-	5	20	50	70	10	5	-	5	20	60	80	Grèce
Hungary	113	21	134	-	-	-	-	215*	25	240*	-	-	-	-	215*	30	245*	Hongrie
Ireland	5*	5*	10					5*	5*	10*					5*	5*	10*	Irlande
Italy	457	1 011	1 468	50	230	-	100	380	1 070	1 450	50	250	-	100	400	1 100	1 500	Italie
Netherlands	102	225	327	25	55	20	13	113	255	368	26	55	20	14	115	260	375	Pays-Bas
Norway	3	5	8					2	6	8					2	6	8	Norvège
Poland	3	12	15	-	-	-	3	3	63	66	-	-	-	-	3	80	83	Pologne
Portugal	2	109	111					10	50	60					15	55	70	Portugal
Romania	-	4	4	-	-	-	-	-	7	7					-*	10*	10*	Roumanie
Spain	73	201	274	50	-	-	5	55	245	300	50	-	-	5	55	245	300	Espagne
Sweden	3	25	28	3	1	(... 1)	(... 1)	5	45	50	3	1	(... 1)	(... 1)	5	45	50	Suède
Switzerland	114	102	216	35	45	(... 30)	(... 30)	110	100	210	35	45	(... 30)	(... 30)	110	100	210	Suisse
Turkey	-	1	1	-	-	-	-	-	2	2	-	-	-	-	-	3	3	Turquie
United Kingdom	43	274	317			24		36	320	356			30		40	340	380	Royaume-Uni
Western Germany	268	1 325	1 593					260	1 400	1 660					260	1 400	1 660	Allemagne occidentale
Yugoslavia	3	-	3					-	10	10					-	20	20	Yougoslavie
TOTAL EUROPE	1 560	5 067	6 627				1 551	5 388	6 939						1 589*	5 488	7 077	TOTAL EUROPE
Canada	385	7	392					342	8	350					351	9	360	Canada
United States	32	163	195					30	145	175					30	140	170	Etats-Unis

a/ Import requirements.

a/ Besoins d'importations.

TABLE No.7

TABLEAU NO.7

EXPORTS OF HARDWOOD LOGS
1,000 m³ (r)

EXPORTATIONS DE GRIMES DE FEUILLES
1,000 m³ (r)

Country	1967				1968				1969 ^{a/}				Pays					
	Actual Réelles		Estimates		Estimates		Estimations											
	Temperate zone wood		Temperate zone wood		Temperate zone wood		Temperate zone wood											
	Essences des régions tempérées	Tropical wood	Essences tropicales	TOTAL	Essences tropicales	TOTAL	Essences tropicales	TOTAL										
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)	(18)	(19)
Austria	54	-	54	-	44	(3.....)	47	-	47	-	47	-	47	(3.....)	50	-	50	Autriche
Belgium-Luxembourg	90	15	105	15	25	24	89	15	104	15	104	15	25	24	89	11	100	Belgique-Luxembourg
Bulgaria	58	-	58	-	-	-	60*	-	60*	-	60*	-	-	-	60*	-	60*	Bulgarie
Czechoslovakia	8	-	8	12	41	4	3	60	-	60	-	-	5	-	5	-	5	Tchécoslovaquie
Denmark	3*	10*	13	-	-	-	-	10*	10*	20*	-	-	-	-	10*	10*	20*	Danemark
Finland	34	-	34	-	-	-	36	36	-	36	-	-	-	35	35	-	35	Finlande
France	667	13	680	260	190	60	155	665	15	680	270	190	55	160	675	15	690	France
Italy	25	-	25	-	-	-	-	20	-	20	-	-	-	-	20	-	20	Italie
Netherlands	3	9	12	1	1	2	4	8	6	14	1	1	2	14	8	6	14	Pays-Bas
Sweden	27	-	27	2	8	(.....20)	30	30	-	30	2	8	(.....20)	30	30	-	30	Suède
Switzerland	73	-	73	5	50	(.....5)	60	60	-	60	5	50	(.....5)	60	60	-	60	Suisse
Turkey	10	-	10	2	1	-	5	8	-	8	-	-	-	-	10	-	10	Turquie
USSR	66*	-*	66*	-	-	-	-	50*	-*	50	-	-	-	-	50*	-*	50	URSS
Western Germany	104	18	122	-	-	-	-	115	17	132	-	-	-	-	120	18	138	Allemagne occidentale
Yugoslavia	18	-	18	-	40	-	-	40	-	40	-	50	-	-	50	-	50	Yougoslavie
Other ^{b/}	3	-	3	-	-	-	-	5*	-*	5*	-	-	-	-	5*	-*	5*	Autres ^{b/}
TOTAL EUROPE	1 243	65	1 308	-	-	-	-	1 303	63	1 366	-	-	-	-	1 277	60	1 337	TOTAL EUROPE
Canada	93	-	93	-	-	41	51	92	-	92	-	-	40	50	90	-	90	Canada
United States	441	-	441	-	-	-	-	500	-	500	-	-	-	-	500	-	500	Etats-Unis

^{a/} Export prospects^{a/} Prévisions d'exportations^{b/} Greece, Hungary, Norway, Spain.^{b/} Espagne, Grèce, Hongrie, Norvège.

TABLE No. 8 1967 actual figures 1968-1969 estimates 1 000 m³ (r) BOIS DE TRITURATION PULPWOOD 1967 chiffres réels 1968-1969 estimations TABLEAU No. 8

Country	INDIGENOUS AVAILABILITIES										DISPONIBILITES NATIONALES										Pays										
	Round or split - Rondins ou quartiers										Wood residues, chips and particles - Résidus, plaquettes et particules de bois											TOTAL									
	Total		Coniferous Résineux		Broadleaved Feuillus		Coniferous Résineux		Broadleaved Feuillus		Résidus, plaquettes et particules de bois		Coniferous Résineux		Broadleaved Feuillus		Coniferous Résineux		Broadleaved Feuillus			Coniferous Résineux		Broadleaved Feuillus							
	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968		1967	1968	1967	1968						
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)	(18)	(19)	(20)	(21)	(22)	(23)	(24)	(25)							
Austria	1 706	2 314	2 405	1 569	1 788	1 856	1 37	526	549	1 230	1 148	1 163	2 936	3 462	3 568	..	2 936	3 019	..	526	549							
Belgium	510	500	500	315	300	300	195	200	200	145	200	200	655	700	700	435	400	400	220	300	300							
Luxembourg	326			273			53						326	340	360							
Bulgaria	3 457	3 570	3 479	2 791	2 866	2 785	666	704	694	706	667	674	4 163	4 237	4 153	3 437	3 473	3 399	726	764	754							
Czechoslovakia	1 638	1 810	1 960	1 172	1 310	1 420	466	500	540	762	800	800	2 400	2 610	2 760							
Denmark	18 200	19 030	20 100	14 700	14 950	15 600	3 500	4 080	4 500	2 700	2 700	2 700	20 900	21 720	22 800	..	17 550	18 200	..	4 180	4 600							
Eastern Germany	25	40	60	-	15	20	25	25	40	5	5	10	30	45	70	5	20	30	25	25	40							
Finland	481	660	710	69	60	60	412	600	650	-	-	-	481	660	710	69	160	60	412	600	650							
France	223	240	260	212	225	240	11	15	20	-	-	-	223	240	260	212	225	240	11	15	25							
Greece	1 609	1 150	1 200	56	50	50	1 553	1 100	1 150	282	200	200	1 891	1 350	1 400	338	250	250	1 553	1 100	1 150							
Hungary	140	150	155	42	50	55	98	100	100	109	130	140	249	280	295	..	160	170	..	120	125							
Ireland	3 947	3 250	3 450	3 605	3 000	3 200	342	250	250	900	500	500	4 847	3 750	3 950	4 505	3 500	3 750	342	250	250							
Italy	2 606	2 665	2 560	2 145	2 185	2 030	461	480	530	1 233	1 380	1 530	3 839	4 045	4 090	..	3 565	3 560	..	480	530							
Netherlands	950	1 150	1 300	400	650	700	550	500	600	15	15	15	965	1 165	1 315	415	665	715	550	500	600							
Norway	2 372	2 968		1 083	1 470		1 289	1 498		570	780		2 942	3 748	4 650	..	1 950		..	1 798								
Poland	1 549	1 746	1 888	914	1 053	1 133	635	693	755	177	195	210	1 726	1 941	2 098	1 090	1 248	1 343	635	693	755							
Portugal	31 195	30 100	31 100	26 505	25 700	26 600	4 690	4 400	4 500	6 234	5 700	6 200	37 429	35 800	37 300	32 739	31 400	32 800	4 690	4 400	4 500							
Romania	775	880	850	670	735	680	105	145	170	280	325	300	1 055	1 205	1 150	950	1 060	980	105	145	170							
Spain	282	280	280	267	265	265	15	15	15	-	-	-	282	280	280	15	267							
Sweden	911	810	872	749	648	703	162	162	169	420	145	175	1 330	955	1 047	..	793	878	..	162	169							
Switzerland	6 141					3 497			9 638	8 700	9 100							
Turkey	1 456	1 500	1 750	653	700	750	803	800	1 000	-	200	200	1 456	1 700	1 950	653	900	950	803	800	1 000							
United Kingdom																															
Western Germany																															
Yugoslavia																															
TOTAL EUROPE													108 528	108 053	113 506																
USSR																															
Canada	48 201	50 000	50 800	44 056			4 145			15 816	18 000	18 700	64 017	68 000	69 500												
United States	80 968	84 400	85 900	56 949	60 400	61 400	24 019	24 000	24 500	33 813	35 100	37 100	119 500	123 000	123 000	86 053	89 700	92 600	28 728	29 800	30 400										

TABLEAU No. 9

 $1\,000\text{ m}^3\text{ (r)}$

Country	IMPORTS										IMPORTATIONS										Pays																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																				
	Round or split - Rondins ou quartiers					Other - Autres					TOTAL					TOTAL																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																									
	Total		Coniferous Résineux		Broadleaved Feuillus	Wood residues Résidus de bois		Wood chips and particles Plaquettes et particules de bois		Coniferous Résineux					Broadleaved Feuillus																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																										
	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968		1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968	1967	1968

TABLE No. 10

PULFWOOD

BOIS DE TRITURATION

TABLEAU No. 10

E/ECE/TIM/92
Annex I
Annexe I
page 10

1967 actual exports
1968 estimated exports
1969 estimated export prospects

1967 exportations réelles
1968 estimation des exportations
1969 estimations des prévisions d'exportations

1000 m3 (r)

Country	EXPORTS										EXPORTATIONS										Pays
	Round or split - Rondins ou quartiers					Other - Autres					TOTAL										
	Total	Coniferous Résineux	Broadleaved Feuillus	Wood residues Résidus de bois	Wood chips and particles Plaquettes et particules de bois	Wood chips and particles Plaquettes et particules de bois	Coniferous Résineux	1967 (12)	1968 (13)	1969 (14)	1967 (12)	1968 (13)	1969 (14)	1967 (15)	1968 (16)	1969 (17)	Coniferous Résineux	Broadleaved Feuillus	1967 (18)	1968 (19)	
Austria	23	50	23	48	0.3	2	(... 75	85	98	135	145	..	133	142	..	2	3	3	Autriche
Belgium Luxembourg	5	5	5	5	0.4	-	..	-	..	-	5	5	10	..	3	5	..	2	5	5	Belgique Luxembourg
Bulgaria	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	Bulgarie
Czechoslovakia	885	940	443	520	442	420	18	10	15	-	918	950	810	476	530	390	442	420	420	420	Tchécoslovaquie
Denmark	35	-	-	-	35	-	-	-	-	-	35	50*	40*	-	-	-	35	-	-	-	Danemark
Eastern Germany	13*	10*	-	-	-	-	-	-	-	-	13*	10*	10*	-	-	-	-	-	-	-	Allemagne orientale
Finland	335	300	..	100	..	200	(... 0.7	50...	335	350	400	..	150	200	Finlande
France	714	500	267	200	447	300	(... 301	300	1 015	800	900	..	350	400	..	450	500	..	France
Hungary	231	330	41	-	190	330	-	-	-	-	231	330	345	41	-	-	190	330	345	345	Hongrie
Italy	-	-	-	-	-	-	-	-	1	-	1	-	-	-	-	-	1	-	-	-	Italie
Netherlands	15	20	14	20	0.5	-	-	(... ..	-	80...	15	100	100	14	0.5	Pays-Bas
Norway	140	100	139	100	1.5	-	29	-	69	50	238	150	150	237	150	150	1.5	-	-	-	Norvège
Poland	390	270	139	170	251	100	-	-	-	-	390	270	130	139	170	100	251	100	30	30	Pologne
Portugal	54	45	36	40	15	5	-	-	-	-	51	45	50	36	40	40	15	5	10	10	Portugal
Romania	462	460	..	-	..	460	0.4	-	-	-	463	460	460*	26	-	-	437	460	-	-	Roumanie
Spain	14	20	-	-	14	20	-	-	-	-	14	20	20	-	-	-	14	20	20	20	Espagne
Sweden	1 929	2 000	1 826	1 900	103	100	115	100	49	50	2 093	2 150	2 100	1 989	2 050	2 000	104	100	100	100	Suède
Switzerland	12	80	7*	50	5*	30	86	70	-	-	98	150	140	93*	120	115	5*	30	25	25	Suisse
USSR	5 505	4 000	..	3 250	..	750	..	200	..	50	5 505	4 250	4 150	..	3 500	3 400	..	750	750	750	URSS
Western Germany	262	-	253	-	9	-	94	-	-	-	356	300	300	..	-	-	..	-	-	-	Allemagne occidentale
Yugoslavia	184	270	0.3	-	184	270	-	-	-	-	184	270	321	0.3	-	-	184	270	321	321	Yougoslavie
TOTAL EUROPE	11 205	-	-	-	-	-	-	-	-	-	12 058	10 795	10 581	-	-	-	-	-	-	-	TOTAL EUROPE
Canada	2 800	2 660	2 560	-	240	-	..	-	2 948	1 300	5 748	3 960	4 100	..	-	-	..	-	-	-	Canada
United States	280	300	280	300	-	-	-	-	1 083	1 700	1 363	2 000	3 000	Etats-Unis

TABLE No. 11

PULPWOOD

BOIS DE TRITURATION

TABLEAU No. 11

1000 m³ (r)

DOMESTIC REQUIREMENTS - BESOINS NATIONAUX										
Country	Total			Coniferous - Résineux			Broadleaved - Feuillus			
	1967	1968	1969	1967	1968	1969	1967	1968	1969	Pays
	Actual Réels	Estimates - Estimations	Actual Réels	Estimates - Estimations	Actual Réels	Estimates - Estimations	Actual Réels	Estimates - Estimations	Estimates - Estimations	
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)
Austria	3 180	4 008	4 146	2 478	2 999	3 087	702	1 009	1 059	Autriche
Belgium)	1 215	1 300	1 300		800	800		500	500	Belgique
Luxembourg)										Luxembourg
Bulgaria	317	340*	360*	270			47			Bulgarie
Czechoslovakia	3 244	3 381	3 343	2 960	3 037	3 009	284	344	334	Tchécoslovaquie
Denmark	330*	350*	370*							Danemark
Eastern Germany	3 440*	3 600*	3 750*	2 851*	3 000*	3 110*	589*	600*	640*	Allemagne orientale
Finland	22 750	23 500	24 400		19 300			4 200		Finlande
France	8 350*	8 674	9 000		4 821	4 900		3 853	4 100	France
Greece	30	45	70		20	30	30	25	40	Grèce
Hungary	457	560	595	214	150	158	243	410	437	Hongrie
Ireland	223*	240*	260*	212*	225*	240*	11*	15*	20*	Irlande
Italy	3 444	3 200	3 300	905	1 000	1 050	2 539	2 200	2 250	Italie
Netherlands	573	610	650							Pays-Bas
Norway	7 150	6 250	6 250	6 677	5 900	5 900	473	350	350	Norvège
Poland	3 493	3 930	4 040	3 283	3 550	3 540	210	380	500	Pologne
Portugal	1 285	1 165	1 315		665	715		500	600	Portugal
Romania	2 480	3 288	4 000*	1 471	1 950		1 009	1 338		Roumanie
Spain	1 849	2 111	2 303	1 228	1 438	1 568	621	673	735	Espagne
Sweden	32 887	34 150	35 700	28 550	29 750	31 200	4 400	4 400	4 500	Suède
Switzerland	1 105	1 125	1 050	985	1 000	885	120	125	165	Suisse
Turkey	338	340	340							Turquie
United Kingdom	1 402	1 383	1 543		1 138	1 288		245	255	Royaume-Uni
USSR										URSS
Western Germany	8 698	9 100	9 400							Allemagne occidentale
Yugoslavia	2 761	2 160 ^{a/}	2 330 ^{a/}		1 300 ^{a/}	1 380 ^{a/}		860 ^{a/}	950 ^{a/}	Yougoslavie
TOTAL EUROPE	111 001	114 810	119 815							TOTAL EUROPE
Canada	56 874	60 000	61 200							Canada
United States	118 050	120 500	123 000	89 172	90 400	92 300	28 878	30 100	30 700	Etats-Unis

a/ Excludes pulpwood for fibreboard

a/ Non compris le bois de trituration pour la fabrication des panneaux de fibres

BOIS DE MINE

PITPROPS

1 000 m3 (r)

TABLE NO.: 12

TABLEAU NO.: 12

Country	1967			1968				1969				Pays
	PRODUCTION (2)	IMPORTATIONS (3)	EXPORTATIONS (4)	Normal requirements Besoins normaux	Indigenous production Production nationale	Imports Importations	Exports Exportations	Normal requirements Besoins normaux	Indigenous production Production nationale	Imports requirements Besoins d'importations	Exports prospects Prévisions d'exportations	
(1)	Estimates											
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)
Austria	188	-	73	76	121	-	45	74	124	-	50	Autriche
Belgium)	400	6	35	350	400	-	50	300	300	-	-	(Belgique
Luxembourg)	44	-	-	-	-	-	-	-	-	-	-	(Luxembourg
Bulgaria	353	26	0.4	370*	350*	20	-	468*	350*	118	-	Bulgarie
Czechoslovakia	694*	-	52	565	615	-	50	545	595	-	50	Tchécoslovaquie
Denmark	-	-	1	-	-	-	-	-	-	-	-	Danemark
Eastern Germany	372	1*	-	350*	350*	-	-	330*	330*	-	-	Allemagne orientale
Finland	20	-	22	-	50*	-	10*	-	-	-	-	Finlande
France	817*	3	82	700*	766*	4	70	700*	762*	3	65	France
Hungary	190	549	0.2	700	200	500	-	680	200	480	-	Hongrie
Ireland	-	-	0.1	-	-	-	-	-	-	-	-	Irlande
Italy	35	24	-	50	35	15	-	50	35	15	-	Italie
Netherlands	77	16	47	50	80	15	45	40	70	10	40	Pays-Bas
Norway	-	-	-	-	-	-	-	-	-	-	-	Norvège
Poland	2 267	-	2	2 400	2 400	-	-	2 450	2 490	-	-	Pologne
Portugal	130	0.3	12	75	100	-	25	75	100	-	25	Portugal
Romania	807	-	-	840	840	-	-	840*	840*	-	-	Roumanie
Spain	897	2	-	825	825	-	-	810	810	-	-	Espagne
Sweden	20	-	2	15	20	-	5	15	20	-	5	Suède
Turkey	406	-	-	418	420	-	-	425	425	-	-	Turquie
United Kingdom	877	282	-	1 150	875	175	-	1 050	875	175	-	Royaume-Uni
USSR	-	-	908	-	-	-	720g/	-	-	-	710g/	URSS
Western Germany	1 090	114	13	1 085	1 000	100	15	970	900	85	15	Allemagne occidentale
Yugoslavia	604	1	58	650	710	-	60	650	710	-	60	Yougoslavie
TOTAL EUROPE	10 288b/	1 022	1 308	10 669b/	10 157b/	829	1 095	10 472b/	9 936b/	886	1 020	TOTAL EUROPE
Canada	-	-	-	-	-	-	-	-	-	-	-	Canada
United States	-	-	-	-	-	-	-	-	-	-	-	Etats-Unis

g/ Excludes exports to Japan.

b/ Excludes the USSR.

a/ Non compris les exportations vers le Japon.
b/ Non compris l'URSS.

PRODUCTION DE PANNEAUX

PRODUCTION OF PANEL PRODUCTS

Country	FIBREBOARD								PANNEAUX DE FIBRE				PARTICLE BOARD a/				PLYWOOD b/				Pays
	Compressed Comprimés				Non-compressed Non-comprimés				Total				PANNEAUX DE PARTICULES/				CONTEPLAQUES b/				
	Actual Réelle	Estimates Estimations	Actual Réelle	Estimates Estimations	Actual Réelle	Estimates Estimations	Actual Réelle	Estimates Estimations	Actual Réelle	Estimates Estimations	Actual Réelle	Estimates Estimations	Actual Réelle	Estimates Estimations	Actual Réelle	Estimates Estimations					
(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)						
(1)	1000 m.t. - 1000 t.m. 1000 m ³																(17)				
Austria	70	70	73	11	11	11	81	81	84	156	180	195	18	20	21	Autriche					
Belgium	47*			7*			54	55*	55*	315	315	340	70	70	70	Belgique					
Bulgaria	-			-			-	-	30*	88	95*	100*	82	82*	82*	Bulgarie					
Czechoslovakia	71	73	73	12	12	12	83	85	85	158	163	168	162	146	153	Tchéoslovaquie					
Denmark	-*	*	*	-*	*	*	5*	5*	5*	58*	65*	70*	16*	15*	15*	Danemark					
Eastern Germany	72	75*	80*	-*	-*	-*	72*	75*	80*	275	305*	335*	31	30*	30*	Allemagne orientale					
Finland	157	175	182	48	48	48	205	223	230	150	281	301	575	600	630	Finlande					
France	183	205	230	36	35	37	219	240	267	511	560	610	536	542	550	France					
Greece	13	13	13	-	-	-	13	13	13	16	20	30	30	35	40	Grèce					
Hungary	44	46	46	-	-	-	44	46	46	56	60	69	28	30	30	Hongrie					
Ireland	17	17*	17*	-	-*	-*	17	17*	17*	29*	35*	40*	5*	5*	5*	Irlande					
Italy	48*			-*			48*	70	75	280	290	310	300	400	420	Italie					
Netherlands	24	25	30	13	15	15	37	40	45	54	58	65	52	42	44	Pays-Bas					
Norway	95	110	115	42	35	35	137	145	150	102	120	130	20*	20*	20*	Norvège					
Poland	183	190	190	51	57	59	234	247	249	184	196	206	168	170	180	Pologne					
Portugal	15*			-*			15	20*	25*	38	45*	50*	15	20*	25*	Portugal					
Romania	160	196	220*	10	10	10*	170	206	230*	138	160	180*	264	263	260*	Roumanie					
Spain	40*	48	50	2*	4	5	42	52	55	166	168	220	205	205	220	Espagne					
Sweden	594	620	635	86	90	95	680	710	730	140	170	195	65*	67	70	Suède					
Switzerland	20			10			30	30	30	145	160	175	22	22	20	Suisse					
Turkey	28	20	25	2	3	5	30	23	30	3	15	20	45	55	60	Turquie					
United Kingdom	20	21	25	17	12	12	37	33	37	150	200	230	32	35	35	Royaume-Uni					
Western Germany	214	200	190	41	40	40	255	240	230	1 354	1 710	1 860	584	600	590	Allemagne occidentale					
Yugoslavia	53	60	65	4	4	4	57	64	69	95	120	140	132	120	140	Yougoslavie					
TOTAL EUROPE	2 168			397			2 565	2 735	2 867	4 661	5 491	6 039	3 458	3 594	3 710	TOTAL EUROPE					
USSR	265*			244*			509			847			1 819			URSS					
Canada	113	145	157	155	159	163	268	304	320	128	145	160	1 868	1 887	1 995	Canada					
United States	925	1 060	1 160	949	1 125	1 200	1 874	2 185	2 360	1 500	1 500	1 600	13 595	13 595	13 955	Etats-Unis					

Includes flaxboard.

a/ y compris les panneaux d'anas de lin.

b/ Includes blockboard.

a/ y compris les panneaux d'anas
b/ y compris les panneaux forts.

PLYWOOD AND PARTICLE BOARD

TABLEAU No. 14

- a/ Includes blackboard.
- b/ Includes flaxboard.
- c/ Import requirements.
- d/ Export prospects.

b/ Y compris les panneaux d'anas de lin.

d/ Prévisions d'exportations.

TABLE No. 15

FIBREBOARD

PANNEAUX DE FIBRES

TABLEAU No. 15

1000 m.t. - 1000 t.m.

Country	IMPORTS - IMPORTATIONS										EXPORTS - EXPORTATIONS										Pays
	Actual Réelles					Estimates Estimations					Actual Réelles					Estimates Estimations					
	Compressed Comprimés	Non- compressed Non- comprimés	Total	Compressed Comprimés	Non- compressed Non- comprimés	Total	Compressed Comprimés	Non- compressed Non- comprimés	Total	Compressed Comprimés	Non- compressed Non- comprimés	Total	Compressed Comprimés	Non- compressed Non- comprimés	Total						
	1967	1968	1969 ^{a/}	1968	1969 ^{a/}	1968	1969 ^{a/}	1968	1969 ^{a/}	1968	1969 ^{b/}	1968	1969 ^{b/}	1968	1969 ^{b/}	1968	1969 ^{b/}				
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)	(18)	(19)	(20)		
Austria	1.0		0.1	1.1	1.2	1.2	0.1	0.1	1.3	1.3	24.0	8.2	32.2	28	30	7	7	35	37		
Belgium- Luxembourg	21.3		18.0	39.3	30	30	15	15	45	45	31.2	4.3	35.5	30	30	5	5	35	35		
Bulgaria																		15	25		
Czechoslovakia	20		3	23.3	26	26	2	2	28	28			9.2	9	10	2	2	11	12		
Denmark	43.4		10.8	54.2	45*	45*	10*	10*	55*	55*		0.2	0.2	-*	-*	-*	-*	-*	-*		
Eastern Germany	49.5			49.5	55*	60*	-*	-*	55*	60*				-*	-*	-*	-*	-*	-*		
Finland	0.1			0.1							109.6	29.0	138.6	120	125	32	32	152	157		
France				41.9					40	40			56.6					60	60		
Greece	9.7			9.7	10	14			10	14											
Hungary	15.4				26	26			26	26											
Iceland				2.2					2*	3*								-*	-*		
Ireland				3.1					3*	3*			10.2					10*	10*		
Italy	12.6		3.3	15.9					10	10			3.2					10	15		
Netherlands	130.5		32.4	162.9	135	135	35	30	170	165	8.4	10.5	18.9	10	10	10	10	20	20		
Norway				4.0	3	3			3	3			46.5	20	20	25	25	45	45		
Poland				13.8	24	71			24	71			44.8	47	57	8	5	55	62		
Portugal				0.1					-*	-*			19.8					25*	25*		
Romania						-*		-*		-*			39.9	45		2		47	50*		
Spain													5.2	8	8			8	8		
Sweden				1.5							351.0	47.7	398.7	370	380	50	55	420	435		
Switzerland				9.9					11	11			1.7					1	1		
Turkey					8	5			8	5											
United Kingdom	240.6		50.0	290.6	272	275	55	56	327	331			3.3					3*	3*		
USSR				-*					1	1			72.2					80	80		
Western Germany	81.4		19.3	100.7	80	80	16	15	96	95	24.9	5.7	30.6	30	30	6	6	36	36		
Yugoslavia													16.2	16	20			16	20		
TOTAL EUROPE				839					915	967			983					1 084	1 136		
Canada	19.9		2.2	22.1	23	25	3	3	26	28	27.4	8.6	36.0	45	56	12	12	57	68		
United States				168.3	185	195	28	29	213	224	9.6	19.1	28.7	15	15	13	13	28	28		

a/ Import requirements

b/ Export prospects

a/ Besoins d'importations

b/ Prévisions d'exportations

DOMESTIC REQUIREMENTS

BESOINS NATIONAUX

TABLE No. 16

TABLEAU No. 16

Country	PLYWOOD CONTREPLAQUES a/				PARTICLE BOARD PANNEAUX DE PARTICULES b/				FIBREBOARD PANNEAUX DE FIBRES				Pays
	1967	1968	1969	(4)	1967	1968	1969	(7)	1967	1968	1969	(10)	
(1)	(2)	(3)	(4)	1000 m3	(5)	(6)	(7)	1000 m. t.	(8)	(9)	(10)	(11)	
Austria	21	12	12		132	148	163		45	47	48	Autriche	
Belgium-Luxembourg	90	85	85		170	170	190		58*	60*	60*	Belgique-Luxembourg	
Bulgaria	69	70*	70*		83*	90*	95*		5	15*	25*	Bulgarie	
Czechoslovakia	133	143	150		134	141	142		96	102	101	Tchécoslovaquie	
Denmark	56*	60*	65*		91*	95*	100*		59	60*	60*	Danemark	
Eastern Germany	49*	50*	50*		317*	350*	380*		121*	130*	140*	Allemagne orientale	
Finland	72	80	80		158	160	170		72	71	73	Finlande	
France	548	552	560		536	591	642		205	222	242	France	
Greece	52	55	58		28	32	43		23	24	27	Grèce	
Hungary	31	33	33		55	60	71		59	72	76	Hongrie	
Ireland	21*	25*	25*		17*	20*	25*		9*	10*	10*	Irlande	
Italy	244	350	360		108	170	170		61	70	70	Italie	
Netherlands	92	107	107		124	218	231		181	187	190	Pays-Bas	
Norway	34*	35*	35*		89	103	105		92	102	108	Norvège	
Poland	170	189	216		169	210	240		203	216	258	Pologne	
Portugal	15*	15*	15*		30*	35*	40*		6*	8*	10*	Portugal	
Romania	132	143	150*		103	127	140*		131	159	170*	Roumanie	
Spain	192	190	200		157	170	200		41	44	47	Espagne	
Sweden	105	106	109		120	143	159		270	290	295	Suède	
Switzerland	57	57	57		160	175	195		38	40	40	Suisse	
Turkey	45	70	60		3	46	46		30	31	33	Turquie	
United Kingdom	1 012	1 085	1 100		303	400	440		319	360	367	Royaume-Uni	
Western Germany	603	630	610		1 394	1 710	1 840		325	300	289	Allemagne occidentale	
Yugoslavia	102*	94	110		113*	150	170		41*	48	49	Yougoslavie	
TOTAL EUROPE	3 957	4 243	4 324		4 664	5 514	5 997		2 486	2 669	2 788	TOTAL EUROPE	
USSR												URSS	
Canada	1 572	1 618	1 692		138	164	185		267	272	280	Canada	
United States	13 955	14 975	15 835		1 365	1 501	1 601		2 016	2 370	2 556	Etats-Unis	

a/ Including blockboards
b/ Including flaxboard

a/ Y compris les panneaux forts
b/ Y compris les panneaux d'ananas de lin

PROGRAMME OF WORK OF THE TIMBER COMMITTEE FOR 1968/69

10. TIMBER

Note: The work programme of the ECE in the field of forest products is developed and carried out jointly with the FAO, the latter organization providing most of 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 1968/1969, in implementation of its long-term programme of work, adopted at its twenty-fifth session. In addition to the annual session of the Timber Committee, Joint FAO/ECE/ILO and FAO/ECE bodies will deal with the projects where appropriate. (The joint projects for which FAO and ILO are primarily responsible do not figure in this list.)

10.1 Priority projects of a continuing nature

10.1.1 Review of forest products market for Europe including forest products statistics

Authority: Timber Committee (E/ECE/TIM/69, paras. 51 and 52; E/ECE/TIM/72, paras. 47 and 48; E/ECE/TIM/75, para. 99; E/ECE/TIM/87, para. 108; E/ECE/TIM/92, paras. 7-8. Terms of Reference: E/ECE/291, Appendix 13, page 11).
Description: The Timber Committee reviews annually the situation for sawn softwood, sawn hardwood and hardwood logs (including tropical), pulpwood, pitprops and panel products. In addition, the Secretariat publishes quarterly market reviews covering sawn softwood, hardwoods, pulpwood, pitprops and panel products, together with statistics relating to production and trade in the main forest products in Europe and North America, and price series supplemented by graphs, comparisons of prices of forest products with those of alternative materials and relevant economic indicators. Market reports are also compiled and published periodically for many of the principal importing and exporting countries of Europe; these reports are based on information collected from official and other sources and publications, which is analysed by the ECE Secretariat. A special survey on the market for pulpwood and miscellaneous roundwood will be undertaken.

10.1.2 Technical co-operation and contacts

Authority: Timber Committee (E/ECE/TIM/66, para. 68; E/ECE/TIM/69, para. 75; E/ECE/TIM/72, paras. 68-71; E/ECE/TIM/75, para. 30; E/ECE/TIM/87, para. 108).
Description: The Committee promotes study tours, training courses and visits by specialists to the forest products industries of member countries within the framework of a long-term programme of work. Personal contacts and participation

in technical meetings are encouraged as means toward solution of technical problems in the forest industries. A study tour will be organized in the USSR on the complex organization of forest work.

10.1.3 Increased efficiency in forest operations

Authority: Timber Committee (E/ECE/TIM/46, Annex III, section VI; E/ECE/TIM/69, paras. 54-60; E/ECE/TIM/72, paras. 49-54; E/ECE/TIM/75, paras. 10-13; E/ECE/TIM/78, paras. 90-95; E/ECE/TIM/87, paras. 87-89; E/ECE/TIM/92, para. 99).

Description: This project aims at increasing efficiency in forest operations by improving methods of work, by mechanization of forest work and by better training of forest workers and prevention of accidents. This project is dealt with by the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers by means of study groups, symposia and training courses and with the collaboration of experts.

10.1.4 European forest and forest products statistics

Authority: Timber Committee (E/ECE/TIM/75, paras. 14-18; E/ECE/TIM/80, paras. 66-75; E/ECE/TIM/84, paras. 79-83; E/ECE/TIM/87, paras. 90-94; E/ECE/TIM/92, paras. 105-107).

Description: This project aims to deal with various statistical problems at the European level arising from the work of the Timber Committee and the European Forestry Commission of FAO, as well as the Conference of European Statisticians. These problems are examined by the Joint Working Party on Forest and Forest Products Statistics.

10.1.5 Economic aspects of, and productivity in, the wood-processing industries

Authority: Timber Committee (E/ECE/TIM/69, paras. 44-47; E/ECE/TIM/72, paras. 59-61; E/ECE/TIM/75, para. 29; E/ECE/TIM/80, paras. 83-87 and 88-89; E/ECE/TIM/84, paras. 89-97; E/ECE/TIM/87, paras. 95-100; E/ECE/TIM/92, paras. 14-15, 21-23, 27-28).

Description: Follow up action to the symposium on the economic aspects of, and productivity in, the sawmilling industry will be continued through further enquiries into the activities in countries participating in its work in the field of sawlog grading. Developments in the packaging, transport and handling of forest products will be kept under review. Follow-up action will be initiated to the Symposium on the factors influencing the consumption of wood-based panel products. An ad hoc meeting of experts will be convened to identify key problems in, and advise the Committee on, the order of priority of projects

in its work in the field of the wood-working industries. A symposium will be convened in Czechoslovakia on the industrial processing of temperate-zone hardwoods. A seminar will be held in Italy on the uses and applications of tropical hardwoods.

10.2 Priority projects of an ad hoc nature

Interim review of the projections in the FAO/ECE Study "European Timber Trends and Prospects, A New Appraisal, 1950-1975"

Authority: Timber Committee (E/ECE/TIM/87, para. 108; E/ECE/TIM/92, para. 98).

This review will be completed and published.

Sector study on the utilization of forest products in construction

Authority: Timber Committee (E/ECE/TIM/87, para. 108; E/ECE/TIM/92, para. 28). This study will be initiated in accordance with the Committee's long-term programme of work.