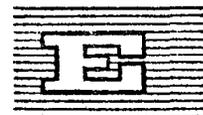


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Timber Committee

REPORT OF THE TIMBER COMMITTEE ON ITS TWENTY-EIGHTH SESSION

12-16 October 1970

As approved by the Committee

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The designations employed and the presentation of the material in this publication do not imply the expression of any opinion whatsoever on the part of the Secretariat of the United Nations concerning the legal status of any country or territory or of its authorities, or concerning the delimitation of its frontiers.

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Introduction

1. The Timber Committee held its twenty-eighth session in Geneva from 12 to 16 October 1970. It was attended by delegates from Austria, Belgium, Bulgaria, Byelorussian SSR, Czechoslovakia, Federal Republic of Germany, Finland, France, Greece, Hungary, Italy, Netherlands, Norway, Poland, 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 International Labour Organisation (ILO), the Food and Agriculture Organization of the United Nations (FAO) and the United Nations Conference on Trade and Development (UNCTAD) also attended. The International Organization of Employers (IOE), the European Confederation of the Wood-working Industries (CEI-Bois), the European Federation of Associations of Particle Board Manufacturers (FESYP), the European Federation of Plywood Manufacturers (FEIC) and the International Confederation of Free Trade Unions (ICFTU), non-governmental organizations, sent representatives. A staff official of the Commission of the European Communities (EEC) attended at the invitation of the Secretariat (for list of delegates, see Annex IV).

2. The Chairman of the Timber Committee, Mr. K. Ronge (Sweden) opened the session and welcomed delegates to the meeting.

3. The Committee was addressed by Mr. J. Stanovnik, Executive Secretary of the Economic Commission for Europe.

Adoption of the Agenda (Item 1 of the Agenda)

4. The Provisional Agenda (E/ECE/TIM/95), presented by the Secretariat, was adopted.

Election of Officers (Item 2 of the Agenda)

5. The Committee unanimously re-elected Mr. K. Ronge (Sweden) as Chairman and Mr. N. Dumitrescu (Romania) and Mr. A. Madas (Hungary) as Vice-Chairmen.

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

6. On the basis of TIM/Working Paper No. 146, the Committee took note of the resolutions, other decisions and discussions of the twenty-fifth session of the Economic Commission for Europe, relevant to the work of the Timber Committee.

7. The Committee took note of the report of the Executive Secretary to the Commission on its "Long-term programme of work and the organization of the activities of the Commission" contained in document E/ECE/755 and the basis for resolution 1 (XXV), which requested the Executive Secretary to inform the other international organizations concerned, namely the FAO and the ILO, of the decisions contained in the resolution with

regard to the nomenclature of the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers and the Joint FAO/ECE Working Party on Forest and Forest Products Statistics. The Committee noted that FAO and ILO in their replies had informed the Executive Secretary that they found certain difficulties in agreeing to the change in the nomenclature of these subsidiary bodies and that they preferred the maintenance of the present nomenclature.

8. Concerning the proposal to establish a subsidiary body on the wood-working industries, the Committee took careful note of the Commission's view, expressed in Commission resolution 1 (XXV), that it should conform to the structure set out on the relevant sections of E/ECE/717. It confirmed, however, the opinion expressed in the report of its 27th session that such a body would enable its work in the field of the wood-working industries to be streamlined. The Committee agreed, therefore, to propose the establishment, on a trial basis, of a provisional Group of Experts on the Wood-working Industries, the effectiveness of which should be reviewed in two to three years' time. It adopted for this Group of Experts the terms of reference proposed by the ad hoc Meeting of Experts to examine the Timber Committee's long-term programme of work in the field of the wood-working industries, which are as follows:

- (i) to meet, on the instructions of the Timber Committee, as the need arises;
- (ii) to advise the Timber Committee on the implementation and co-ordination of its activities in the fields of the wood-working industries, product development and utilization and to comment on new proposals for inclusion in these sectors of the Committee's programme of work, bearing in mind the need to avoid duplication of work with other international bodies;
- (iii) when specifically requested to do so by the Timber Committee, to advise on and assist in the preparation of symposia, seminars, and other activities in the field of the wood-working industries included in the Committee's programme of work, and to review and comment upon the results and recommendations emerging from such activities;
- (iv) to discuss in depth, bearing in mind the overall priorities and guidelines laid down for the Timber Committee's work, technical and economic aspects of the wood-working industries which are referred to it by the Committee, and to report to the Committee on its discussions.

9. With regard to Commission decision H (XXV) - Activities of the Commission in the field of standardization, the Committee agreed to bear in mind, when considering the relevant items on its Agenda, the invitation of the Commission to its Principal Subsidiary Bodies to give special attention to problems of standardization in their respective fields.

Other matters affecting the work of the Timber Committee (Item 4 of the Agenda)

10. The Committee was informed of the results of the 8th meeting of its Office-holders in April 1970 (TIM/Working Paper No. 147).

11. It agreed that there was a need to reduce the complexity of the worksheets used at the Committee's annual sessions and containing countries' estimates for the current and following years. Accordingly, it endorsed the Office-holders' proposals, by which the number of worksheets had been reduced on a trial basis from 16 to 10 for use at the current session.

12. The Committee also supported the Office-holders' proposal that the Timber Bulletin for Europe should be published at half-yearly intervals instead of quarterly, but that it should continue to show quarterly totals of production and trade of forest products. It requested the Secretariat to make the necessary arrangements for the change in periodicity, along the lines proposed in TIM/Working Paper No. 147, and noted that this would take effect in 1971 with Volume XXIV of the Timber Bulletin.

13. The Committee was informed of the preliminary results of an enquiry amongst countries participating in its work, which was instigated at the suggestion of the Office-holders, into the scope and purpose of the whole range of the Committee's market reviews, studies and statistics, as published in the Timber Bulletin for Europe and its Supplements. It fully supported the Office-holders' view that these publications provide a valuable and almost unique source of basic forest products data covering the ECE region, as well as objective assessments by the Secretariat of current and expected market developments, and that the only purpose of an appraisal of them would be to seek possible ways of further improving their usefulness to the reader. Accordingly, it agreed that the enquiry mentioned above should be continued along the lines proposed in TIM/Working Paper No. 147, and invited its Office-holders to review the results of the enquiry and, if felt necessary, to draw up proposals concerning possible ways of improving the Committee's publications, for consideration at its 29th session.

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

14. The Committee was informed of the activities of FAO relevant to its work, including those of the FAO's Advisory Committee on Pulp and Paper and its Committee on Wood-based Panel Products, as well as the outcome of the 15th session of the European Forestry Commission and of the FAO Regional Conference for Europe in Budapest, both of which were held in September 1970. The preparations were described for the Joint UN/FAO

World Consultation on the use of wood in housing, which is to be held in Canada in July 1971. The representative of UNCTAD informed the Committee of the discussions at the fourth session of the UNCTAD Committee on Shipping on the report on Maritime Transportation of Tropical Timber.

Activities of permanent subsidiary bodies (Item 6 of the Agenda)

(a) Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers - Eighth session

15. Mr. K. Voronitsin (USSR), Chairman of the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers introduced the report of the eighth session of the Joint Committee which was held in Stuttgart, Federal Republic of Germany, in June 1970, and which was preceded by a study tour in the south-west of the Federal Republic of Germany (FAO/ECE/LOG/239). The report was approved by the Timber Committee and thanks were expressed to the Government of the Federal Republic of Germany for the excellent organization of the session and the very interesting study tour.
16. The Committee noted that the Study Group on a Multilingual Glossary of forest Work Science had been disbanded, since its work had been terminated. The Committee also noted that, at the invitation of the Government of the USSR, a Symposium on Forest operations in mountainous regions will be held in the Caucasus, in September 1971.
17. The representative of Hungary, on behalf of his Government, confirmed the invitation, extended to the Joint Committee at its eighth session, to act as host to its ninth session in 1972 in Hungary. This would be in conjunction with a study tour and a Symposium on techniques of constructing and maintaining forest roads for use by motor vehicles.
18. While stressing the importance and value of the work of the Joint Committee, the Timber Committee felt that the problem of the mechanization of the harvesting of small-sized wood should remain one of its main preoccupations. The Timber Committee also stressed the importance that should be attached to questions of cost and output in forest operations.
19. A suggestion by one delegation was recorded, that the Joint Committee should consider the possibility of simplifying and updating certain testing protocols for forest tractors, which had been published in 1960.

(b) Joint FAO/ECE Working Party on Forest and Forest Products Statistics -
Eighth session

20. In the absence of its Chairman, Mr. O. Eckmüller (Austria), Mr. A. Froncillo (Italy), Vice-Chairman of the Joint FAO/ECE Working Party on Forest and Forest Products Statistics, presented the report of its eighth session, which took place in Geneva in March 1970. The report was approved by the Committee.

21. The Committee took note of the progress that had been made in the international co-ordination and harmonization of statistical enquiries concerned with forest products, as well as of the efforts made to improve the Standard International Trade Classification (S.I.T.C.).

22. The Committee approved the proposals for the improvement of the questionnaires used in connexion with its Annual Forest Products Market Review and of the Survey of the structure of, and raw material consumption by, the wood-based panel products industries. In relation to the latter it agreed to seek the advice of the FAO Committee on Wood-Based Panel Products with respect to:

- (i) the possibilities of achieving world-wide uniformity on units of measurement;
- (ii) the most suitable terminology for fibreboard;
- (iii) definitions for "improved" panel products, and
- (iv) collaboration in adopting an internationally agreed definition of production capacity.

23. The Committee recognized that priority should be given, in the following order, to
(a) problems of quantification and evaluation of the indirect benefits of forestry,
(b) product definitions and classifications and (c) a new survey of conversion factors.

24. The offer of Finland to supply experts to assist in work on roundwood removal statistics, including the associated problem of classification of roundwood, and on indirect benefits, was noted with gratitude. Other countries were invited to consider the possibilities of making similar offers.

25. It was urged that, in future work on economic indicators, attention be given to indicators of productivity in the harvesting and processing of forest products, as well as to an internationally comparable system of national indices showing the degree of mechanization in harvesting. Such work should be undertaken in collaboration with the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers.

26. The Committee noted with keen interest that IUFRO intended to organize a seminar on data capture for forestry and forest industries, possibly in the latter part of 1971, and that this accorded closely with the recommendation by the Seminar on the application of electronic data processing (EDP) in forestry and forest industries, which was held in January 1970, for further work to be carried out in this field. In welcoming the IUFRO proposal, the Committee expressed the hope that countries participating in its work would have the opportunity to take part in the seminar, and requested its Secretariat to assist IUFRO in this project insofar as available resources allowed.

Market review and prospects (Item 7 of the Agenda)

(a) Introduction of market statements by delegations

27. The Committee received statements on developments in the market for sawn softwood, hardwoods, pulpwood, pitprops and coniferous logs, and wood-based panel products, and examined the Secretariat's draft Annual Forest Products Market Review (TIM/Working Paper No. 148). It compiled the worksheets reproduced in this report as tables 1 to 10 in Annex I.

(b) Sawn softwood

28. Totals of Europe's production, trade and domestic requirements in 1969, and the Timber Committee's estimates for 1970 and 1971, are shown below (see also Annex I, tables 1 to 3).

European^{a/} totals for sawn softwood in 1969 and estimates for 1970 and 1971
(million m³)

Year	Production		Imports		Exports (incl. USSR)		Domestic requirements ^{d/}	
	Volume	% change from pre-vious year	Volume	% change from pre-vious year	Volume	% change from pre-vious year	Volume	% change from pre-vious year
1969	61.63	+ 3.2	26.61	+ 0.3	26.97	+ 3.8	69.77	+ 2.1 ^{e/}
1970	63.23	+ 2.6	26.18	- 1.6	26.70	- 1.0	70.98	+ 1.7
1971	64.01	+ 1.2	26.72 ^{b/}	+ 2.1	26.53 ^{c/}	- 0.6	72.29	+ 1.8

a/ Excluding the USSR, except for exports

b/ Import requirements

c/ Export prospects

d/ Stock changes may not have been taken into account

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

(i) Situation in 1969

29. Production of sawn softwood in Europe (USSR not included) expanded for the second year running to reach a new record volume in 1969 of 61.6 million m³ (13.2 million stds). The increase of 3% in 1969 over the previous year's record corresponded with the expansion estimated at last year's Timber Committee session. Five countries - Sweden, Austria, Turkey, Spain and Portugal - attained new peak levels of output. Europe's domestic requirements also reached a new record volume at 69.8 million m³ (14.9 million stds) in 1969, having expanded for the third year in succession, and showed an increase of about 1.4 million m³ (nearly 300,000 stds) or 2% on the previous year.

30. Europe's trade in sawn softwood did not fully reflect the growth of domestic requirements in 1969, because a portion of the increased consumption was met from the higher level of production and by the reduction of stock levels in some of the main importing countries. Exports, including those to Europe from non-European sources, at 29.4 million m³ (6.3 million stds) were 1% higher than in the previous year, a substantial reduction in supplies from Canada to Europe largely offsetting increases by European countries. The volume of imports at 26.6 million m³ (5.7 million stds) was little changed from the previous year's total.

(ii) Development of the 1970 market

31. At the October 1969 session, it had been expected that Europe's import requirements in 1970 would show a marginal increase of about 1% above the total expected in 1969. The estimate for 1970 has now been revised slightly downwards to a total of 26.2 million m³ (5.6 million stds). Although in aggregate Europe's revised import requirements for 1970 show little change from last year's original estimate, some rather substantial amendments have now been submitted by individual countries. Downward revisions by the United Kingdom, Italy, Hungary and Spain are not quite counterbalanced by upward revisions by France, Denmark, the Federal Republic of Germany and the Netherlands. The United Kingdom now estimates imports in 1970 at 7.75 million m³ (1.66 million stds), which would in fact be the lowest total for eight years. The reduction in housing starts coupled with the effects of the recent dock strike and a considerable reduction in stock levels are the primary reasons for this low volume of imports expected this year. The upward revision in the estimate of the Federal Republic of Germany is not surprising, since it was stated that the figure

for 1970 submitted last year had not allowed for the possible effects of the revaluation of the Deutschmark. It appears that most of the substantial increase in Denmark's imports this year may go into stock rather than into immediate consumption.

32. The estimate of Europe's total exports in 1970, including those of the USSR, has now been revised upwards by 3% to a figure of 26.7 million m³ (5.7 million stds), which is, however, still 1% lower than the actual total in 1969. An 8% increase in the estimate of Finnish exports this year is rather more than offset by reductions in estimated exports from Austria, Sweden and the USSR. As against Europe's slight reduction in the total export estimate for 1970 compared with last year, that of non-European exporting countries to Europe is up by a quarter, mainly due to the recovery in shipments from Canada.

33. The strength of the development of Finnish sales was remarkable and was due in part to increased competitiveness vis-à-vis some other exporting countries and in part to greater availability for export. The exceptionally high volume exported by Sweden in 1969 had led to a substantial reduction of stocks and availabilities for shipment in the early part of 1970, and Swedish sales by end-September were still 10% below the previous year's total exports; at the same time, Canadian sales to the United Kingdom staged a strong recovery from the depressed 1969 levels.

34. In attempting to assess the final developments of this year's market, account should be taken of the fact that the United Kingdom has revised its import estimate downwards, because of the effects that the July dock strike continue to have on the turn-round of shipping, which may well result in goods bought for delivery this year not now arriving until the early months of 1971. It is possible that other countries equally affected by the dislocation of shipping have anticipated that imports purchased for arrival this year will be delayed. Furthermore, there is the sharp change in Italy's estimates of imports for this year from an anticipated increase of 4% forecast last October to the now revised estimate of a 10% drop compared with the 1969 total. These factors may not have been fully anticipated in exporters' estimates of deliveries of goods sold, since the bulk of the requirements was bought before the dislocation in the shipping flow took place. As a result there is an apparent surplus of 1.3 million m³ (282,000 stds) in the total of estimated exports compared with imports, which is considerably larger than usual.

(iii) Outlook for 1971

35. The Timber Committee estimated that domestic requirements of sawn softwood in Europe, excluding the USSR, would continue to rise in 1971 at an annual rate of nearly 2% to reach a total of 72.3 million m³. A levelling off in the growth of consumption in some countries may be offset by recoveries elsewhere, for example the United Kingdom and Italy, as well as by the continuing upward trend in the Federal Republic of Germany.

36. Europe's estimated total of import requirements in 1971 of 26.7 million m³ (5.7 million stds) shows an increase of 2% above the estimated total for the current year and if this total is eventually achieved it would establish a new peak volume, just exceeding the 1964 record.

37. The main changes in import requirements next year are anticipated recoveries in demand from the United Kingdom, Italy and Belgium-Luxembourg and likely further expansion by the Federal Republic of Germany and France. These countries include the biggest outlets for exports from all the main sources of supply, and their estimated increase in imports in 1971 would very much more than offset a rather sharp reduction expected by Denmark, and declines by the Netherlands and Spain.

38. The estimated total of Europe's export prospects in 1971, including those of the USSR and from countries outside the region to Europe, at 29.5 million m³ (6.3 million stds) is slightly lower (less than 1%) than the estimate for 1970. Apart from a reduction of 3% anticipated by Austria from the high 1970 level, the estimates of the other main exporting countries are little changed from the estimates for this year. A slight increase in Canadian exports to Europe next year was projected after making allowance for an expected recovery in demand from the United States and an estimated increase in exports to Japan, Australia and South Africa. On balance, therefore, total export availabilities appear to be adequate to meet projected demand in 1971.

39. The Committee noted reports of sawn softwood being replaced by tropical sawnwood and panel products, a development that had been taking place for some time and which is expected to make a further impact on the demand for sawn softwood in some countries in the future.

40. It was also noted that forward prices for sawn softwood rose again in 1970 for the third successive year and thus achieved the second longest upward trend for more than two decades. This year's rise may reflect to some extent the sharp increase in demand

for pulpwood which has created competition for lower grade logs. It also corresponds to the strength and persistence of inflationary forces which have led to pronounced and widespread price rises for a number of commodities. Nevertheless, there are grounds for thinking that sawn softwood prices have outstripped those of some other forest products, thereby encouraging substitution. For example, sawn softwood imports into the United Kingdom in the first half of 1970 were 18½% down compared with the period two years earlier, while the volume of plywood imports rose by 15% during the same period.

41. It is against the foregoing background, and bearing in mind that the estimate of exports to Europe in 1970 is now expected to be 1.3 million m³ higher than that of imports, that we approach the opening of the market for 1971.

42. On the face of it, it would appear that there may be a bigger than usual carry forward of unshipped balances from this year to the next, which might have a delaying effect on the opening of the main buying campaign for next year. It also seems possible that with current forward prices for most categories of sawn softwood at new all time record levels, there will be resistance to further increases even though these may be justified by corresponding increases in production costs.

43. In this respect, the Committee noted reports that a total freeze on domestic prices had recently been introduced in Denmark and Sweden. It was stated that this freeze was not likely to have an influence on price negotiations for logs now going on in Sweden.

44. These factors may lead to a cautious approach to next year's market. Nevertheless, the Committee noted the coincidence that Europe's three biggest importing countries all anticipate higher import requirements in 1971 than for the present year. The fact that these countries, the United Kingdom, the Federal Republic of Germany and Italy, not only account between them for well over half Europe's total imports, but also constitute the biggest European outlets for sawn softwood supplies from northern Europe, the USSR and Canada, as well as central and southern Europe, should result in a steady and progressive development of the market for the year ahead.

(c) Hardwoods

(i) Sawn hardwood

45. Totals of Europe's production, trade and domestic requirements of sawn hardwood in 1969, and estimates for 1970 and 1971, are shown below (see also Annex I, tables 3 and 4).

European^{a/} totals for sawn hardwood in 1969
and estimates for 1970 and 1971
(million m³)

	Year	Production		Imports		Exports		Domestic requirements ^{e/}	
		Volume	% change from previous year	Volume	% change from previous year	Volume	% change from previous year	Volume	% change from previous year
Temperate-zone species	1969	..		1.98	+ 6.0*	2.16		..	
	1970	..		1.99	+ 0.5	2.26 ^{c/}		..	
	1971	..		1.98	- 0.5	2.33 ^{c/}		..	
Tropical species	1969	..		1.58	+12.6*	0.09		..	
	1970	..		1.54	- 2.5	0.10 ^{c/}		..	
	1971	..		1.59	+ 3.2	0.10 ^{c/}		..	
Total	1969	17.52	+ 2.4*	3.56	+ 8.8	2.24 ^{d/}	+ 5.7	18.70	+ 2.8* ^{f/}
	1970	17.87	+ 2.0	3.53 ^{b/}	- 0.8	2.36 ^{d/}	+ 5.4	19.02	+ 1.7
	1971	18.19	+ 1.8	3.57 ^{b/}	+ 1.1	2.42 ^{c/d/}	+ 2.5	19.32	+ 1.6

a/ Excluding the USSR

b/ Import requirements

c/ Export prospects

d/ Excludes Romanian exports of boxboards

e/ Stock changes may not have been taken into account

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

46. Further growth in Europe's production and domestic requirements of sawn hardwood is predicted by the Timber Committee in 1970 and 1971, but the rate of growth is expected to decline compared with that recorded in 1969, when it amounted to about 3% more than the 1968 level. European sawn hardwood production is estimated to exceed 18 million m³ for the first time in 1971, while domestic requirements may reach 19 million m³ in 1970 and 19.3 million m³ in 1971.

47. Strong growth in European imports of sawn hardwood in 1968 and 1969 to reach about 3.5 million m³ in the latter year is estimated to be followed by a levelling off in 1970 and 1971. Imports of temperate-zone sawn hardwood may remain constant at about 2 million m³ between 1969 and 1971. Those of tropical sawn hardwood, however, which accounted for a major part of the increase in the previous two years, are estimated to fall slightly in 1970 but to recover in 1971. No big changes in the volume of imports are forecast for 1970 and 1971, compared with the previous year, by any European country.

48. With regard to Europe's exports, a growth rate of about 5½% is estimated in 1970, slowing down to 2½% in 1971. Compared with an increase in total European exports of 181,000 m³ expected between 1969 and 1971, Yugoslavia, France, Czechoslovakia and Turkey together forecast an expansion of 215,000 m³, while exports from Romania and Finland are estimated to be lower in 1970 and 1971 than in 1969.

(ii) Hardwood logs

49. Totals of Europe's trade in hardwood logs in 1969, and the Committee's estimates for 1970 and 1971, are given below (see also Annex I, table 5).

European^{a/} totals for trade in hardwood logs
in 1969 and estimates for 1970 and 1971
(million m³)

	Year	Imports		Exports	
		Volume	% change from previous year	Volume	% change from previous year
Temperate-zone species	1969	1.73	- 2.0*	1.31	
	1970	1.62 ^{b/}	- 6.4	1.35	
	1971	1.60 ^{b/}	- 1.2	1.35 ^{c/}	
Tropical species	1969	7.19	+16.4*	0.09	
	1970	6.51 ^{b/}	- 9.5	0.08	
	1971	6.83 ^{b/}	+ 4.9	0.08 ^{c/}	
Total	1969	8.92	+12.3*	1.40	+ 4.5
	1970	8.12 ^{b/}	- 9.0	1.43	+ 2.1
	1971	8.43 ^{b/}	+ 3.8	1.43 ^{c/}	-

a/ Excluding the USSR

b/ Import requirements

c/ Export prospects

50. The massive increase in imports of tropical hardwood logs in 1969 led to a build-up in stock levels at the end of the year in the main European importing countries. This, combined with over-availability of logs in some tropical exporting countries and a more cautious assessment by importers regarding trading conditions in 1970, resulted in a considerable reduction in purchasing for 1970 delivery. Europe's imports of tropical hardwood logs are estimated to fall by $9\frac{1}{2}\%$ or nearly 700,000 m³ in 1970 compared with the record 1969 volume, with Italy, France and the Federal Republic of Germany accounting for a large part of the decrease. In 1971, Europe's imports of tropical hardwood logs are estimated to recover by 5% or about 300,000 m³, to 6.8 million m³.

51. A slight fall in Europe's imports of temperate-zone hardwood logs between 1968 and 1969 is estimated to be followed by further declines in 1970 and 1971, but the changes in volume are not important compared with the substantial changes forecast for the imports of tropical logs.

52. Europe's hardwood log exports are estimated to rise only slightly from 1.40 million m³ in 1969 to 1.43 million m³ in 1970 and 1971. Expected growth in France's log exports is partly offset by estimates of lower shipments by Czechoslovakia.

53. During the course of the discussion on the hardwood market, the Committee's attention was drawn to the fact that, because of the difficulties in drawing up accurate forecasts, countries' estimates should be looked upon as guides to the general trend of the market, and not as precise forecasts of levels of trade, production or domestic requirements in a given year. In this connexion, it was pointed out that the Committee's assessments of the hardwood market at previous sessions had, by aggregating countries' individual forecasts, been generally successful in providing useful indications of market trends.

(iii) Prices for hardwoods

54. After the considerable rise in prices for most species of tropical hardwood logs in 1968 and 1969, the imbalance of supply and demand led to price falls in 1970, which were substantial in the case of a number of species such as sipo and others of the mahogany group. On the whole, prices in Europe for tropical sawn hardwood have remained steadier during 1970 than for logs, while those for temperate-zone hardwoods were firm, with an upward trend noticeable for oak and birch. Attention was drawn to the considerable variety of hardwood species and qualities available in Europe and to the diversity in their end-uses. This made it difficult to draw conclusions about

overall trends in hardwood prices or about the possible influence of changes in prices in one sector of the market on other sectors. It appeared, however, that the setback in the prices of a number of tropical hardwood species in 1970 had not had any marked effect on the prices of European hardwoods.

55. The Committee drew attention to the upturn in import requirements for tropical hardwood logs forecast for Europe in 1971 and considered that this, in conjunction with the efforts being made by producers in west Africa to bring supply into better balance with demand, should create conditions for a more stable market next year.

(d) Pulpwood, pitprops and coniferous logs

(i) Pulpwood

56. Totals of Europe's domestic supply and requirements and trade of pulpwood (round and split, wood residues, chips and particles) in 1969, and the Timber Committee's estimates for 1970 and 1971, are shown below (see also Annex I, tables 6 and 7).

European^{a/} totals for pulpwood in 1969 and estimates for 1970 and 1971
(million m³)

Total	Domestic supply		Imports		Exports (incl. the USSR) ^{c/}		Domestic requirements ^{e/}	
	Volume	% change from previous year	Volume	% change from previous year	Volume	% change from previous year	Volume	% change from previous year
1969	117.89	..	14.77	..	13.54	..	125.12	+ 8.2* ^{f/}
1970	124.69	+ 5.8	16.45	+ 11.4	14.23	+ 7.1	131.90	+ 5.4
1971	129.99	+ 4.2	16.55	+ 0.6 ^{b/}	13.52	- 5.0 ^{d/}	137.71	+ 4.4
of which:								
<u>Pulpwood (round and split)</u>								
1969			12.47	+ 8.8	11.98	+ 8.4		
1970			14.34	+15.0	12.67	+ 5.8		

a/ Excluding the USSR, except for exports

b/ Import requirements

c/ Excludes USSR exports to Japan

d/ Export prospects

e/ Stock changes may not have been taken into account

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

57. Domestic requirements of pulpwood in Europe, excluding the USSR, are estimated to rise by about 5% a year between 1969 and 1971 to reach 137.7 million m³ in the latter year. Compared with a rate of growth of 8% achieved between 1968 and 1969, expansion is estimated to be at a rate of 5½% in 1970, slowing down further to 4½% in 1971. Growth in Europe's domestic supply of pulpwood is predicted to be roughly parallel with that of requirements, the former rising by a volume of about 12.1 million m³ in the two-year period 1969 to 1971, and the latter by 12.6 million m³.

58. Over the same two-year period, the three Nordic countries estimate an increase in their domestic requirements of pulpwood of 5.9 million m³ or 8½% to 73.6 million m³, while for the rest of Europe the estimated expansion is of 6.7 million m³ or 12% to 64.0 million m³. The latter group of countries may, in consequence, further increase their share of the European total to over 46% by 1971.

59. Europe's imports of pulpwood of all categories are estimated to increase by about 1.7 million m³ or 11½% in 1970 compared with 1969. In contrast, the region's exports, including those of the USSR to Europe, are forecast to rise by only about 700,000 m³ or 5%. Canadian exports to Europe are expected to be somewhat higher in 1970 than in 1969. For 1971, European import requirements are estimated to level out at 16.5 million m³, but a decline of 5% is predicted in export prospects to 13.5 million m³, which figure includes those of the USSR to Europe. Of the two largest exporting countries of pulpwood to Europe, the USSR predicts little change in the volume of its shipments between 1969 and 1971, while Sweden estimates an increase between 1969 and 1970 of nearly 300,000 m³, followed by a decline of 560,000 m³ in 1971. Among the major importing countries Norway, Italy, France and Austria forecast substantial increases in pulpwood imports in 1970. Finland, on the other hand, estimates a 25% decrease, to 1.55 million m³, at the same time predicting a 44% expansion of its exports to 800,000 m³.

60. The Committee recalled that at its October 1969 session, it was confronted with estimates of pulpwood exports and imports showing divergent trends. It had concluded on that occasion that actual developments in trade in 1969 and 1970 were likely to differ from those indicated by the estimates, as adjustments were made through trade movements to correct supply/demand imbalances in individual countries. In the event, Europe's imports in 1969 rose appreciably less, and its exports more, than forecast in October 1969.

61. In considering that this experience was likely to be repeated in the current year and also in 1971, the Committee noted a number of factors which were also exerting an influence on short-term trends in the domestic supply and trade of pulpwood. One was the very marked rise in prices reported by many countries over the past year, especially for broadleaved pulpwood, which had stimulated roundwood production in some countries where scarcity of forest labour was not an inhibiting factor. Another was the limited prospects for increasing exports in the future in such major exporting countries as Sweden and France, despite seemingly large forest reserves, owing to high harvesting costs, labour shortages and/or to their own increasing domestic requirements. The marked expansion in the use of wood residues and chips witnessed in 1969 and forecast to continue in 1970 was also referred to as a way in which countries were overcoming shortages of roundwood for pulping or panel products manufacture.

(ii) Pitprops

62. Totals of Europe's imports and domestic requirements of pitprops in 1969, and the Timber Committee's estimates for 1970 and 1971, are shown below (see also Annex I, table 8).

European^{a/} totals for pitprops in 1969 and estimates
for 1970 and 1971
(million m³)

Year	Imports		Domestic requirements	
	Volume	% change from previous year	Volume	% change from previous year
1969	1.13	+ 17.2	9.88	-
1970	1.11	- 1.8	9.60	- 2.8
1971	1.03 ^{b/}	- 7.2	9.25	- 3.6

a/ Excluding the USSR

b/ Import requirements

63. Following the sharp recovery in Europe's imports of pitprops in 1969, the downward trend of recent years is expected to continue in 1970 and 1971. It appears that much of the improvement in last year's trade was due to the need to replenish stocks in the importing countries which had fallen to unusually low levels in some countries. It is also significant that last year's recovery in import demand for

pitprops in the main importing countries coincided with the upward trend of demand for pulpwood, since it is known that the term "pitprops" does not always imply the end-use for which they are purchased, especially where international trade is involved.

64. Domestic requirements which levelled out in 1969 are expected to resume their long-term decline in 1970 and 1971.

(iii) Coniferous logs

65. Totals of Europe's trade in coniferous logs in 1969 and the Timber Committee's estimates for 1970 and 1971 are shown below (see also Annex I, table 8).

European (incl. the USSR) totals for coniferous logs
in 1969 and estimates for 1970 and 1971

(million m³)

Year	Imports		Exports	
	Volume	% change from previous year	Volume	% change from previous year
1969	3.17	- 7.3	1.47	- 6.1
1970	2.86	-10.0	1.14	-22.4
1971	2.96 ^{a/}	+ 3.5	1.03 ^{b/}	- 9.6

a/ Import requirements

b/ Export prospects

66. Europe's trade in coniferous logs, which was appreciably lower in 1969 than the high levels reached in 1968 as an outcome of the severe damage to forests in central Europe in the winter and spring of 1966/67, is expected to fall again sharply in the course of the current year. For 1971 a continued decline is anticipated for exports, but Europe's total import requirements are estimated to recover slightly from this year's reduced volume.

(iv) Prices

67. With the further considerable expansion of demand for pulpwood by Europe's woodpulp, particle board and fibreboard industries, prices moved sharply upwards in the latter half of 1969 and the first half of 1970. Supply difficulties during the winter of 1969/70 due to adverse weather conditions for logging, as well as the labour shortages referred to earlier, also contributed to the firmness of pulpwood prices. Those for broadleaved pulpwood rose particularly strongly in many European countries.

This trend was in line with the more rapid growth of demand for short-fibre pulp compared with other categories and the particular firmness of the hardwood pulp market, and prices for broadleaved pulpwood reached new peak levels in the course of the year. Despite these increases, prices for broadleaved pulpwood are still appreciably below those for coniferous, when expressed in terms of price per unit weight. Generally speaking the firm trend of pulpwood prices was expected to continue into 1971, although there are indications that the very tight supply position in Europe during last winter improved during the summer of 1970 and that consumer industries in some countries have been able to reconstitute their stocks of pulpwood.

68. As usual the prices of pitprops and coniferous logs followed the trend of those for pulpwood, and the increased demand created competition for the lower grades of sawlogs.

(e) Panel products

(i) Plywood and blockboards

69. Totals of Europe's production, trade and domestic requirements of plywood and blockboards in 1969, and the Timber Committee's estimates for 1970 and 1971, are shown below (see also Annex I, tables 9 and 10).

European^{a/} totals for plywood and blockboards in 1969
and estimates for 1970 and 1971
(million m³)

Year	Production		Imports		Exports		Domestic requirements ^{d/}	
	Volume	% change from previous year	Volume	% change from previous year	Volume	% change from previous year	Volume	% change from previous year
1969	3.86	+ 6.6	1.79	+ 4.1	1.12	+ 9.9	4.60	+ 3.9 ^{e/}
1970	4.06	+ 5.2	1.93	+ 7.8	1.17	+ 4.5	4.83	+ 4.8
1971	4.21	+ 3.7	2.01 ^{b/}	+ 4.1	1.24 ^{c/}	+ 6.0	5.00	+ 3.5

a/ Excluding the USSR

c/ Export prospects

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

b/ Import requirements

d/ Stock changes may not have been taken into account

70. Plywood production in Europe, excluding the USSR, rose by $6\frac{1}{2}\%$ between 1968 and 1969 and it is estimated to expand by 5% during 1970 and by about $3\frac{1}{2}\%$ in 1971 to reach 4.2 million m^3 in the latter year. Among the major producing countries, above average rates of expansion over the two-year period 1969 to 1971 are expected in Italy and France, with increases of $18\frac{1}{2}\%$ and 12% respectively, while some high rates of growth during the period are estimated by some of the smaller producing countries, notably Sweden, which is developing the production of softwood plywood for constructional purposes. In Finland, now Europe's largest producer, capacities continue to expand, despite the fact that availabilities of birch peeler logs are becoming insufficient to meet further increases in demand for raw materials, and spruce corestock is now being used in some cases, in order to make the most economic use of the available birch.

71. The growth rate in European countries' domestic requirements is estimated to accelerate slightly from 4% between 1968 and 1969 to nearly 5% in 1970, with a further increase of $3\frac{1}{2}\%$ in 1971. More than half of Europe's total estimated increase of 171,000 m^3 between 1970 and 1971 is expected to take place in the largest consuming country, the United Kingdom.

72. European imports of plywood are estimated to expand by 8% in 1970, and by a further 4% in 1971. In both years, the main change is the estimated increase in the United Kingdom imports of about 10% a year to reach what would be the new record level of 1.15 million m^3 in 1971. In the rest of Europe, however, estimated import requirements in 1971 of 862,000 m^3 are only 3% higher than actual imports in 1969. Imports are estimated to fall between 1970 and 1971 in the Netherlands, where measures to reduce the overheating of the economy are expected to lead to lower levels of consumption and imports next year. Imports in France are forecast to turn downwards in 1971, but against this, Poland estimates a volume of import requirements next year of more than double the 1969 figure.

73. The rate of growth of Europe's plywood exports, excluding those of the USSR, is estimated at $4\frac{1}{2}\%$ in 1970 and 6% in 1971, mainly as a result of expected increases by Italy, Finland and France.

74. Production of plywood in Canada, after falling in 1970 due to weaker domestic demand, is forecast to rise by 18% in 1971 to 2.1 million m^3 in response to improved domestic and overseas demand, notably in Europe, and the coming on stream of new production capacity.

(ii) Particle board (including non-wood particle board)

75. Totals of production, trade and domestic requirements of particle board in Europe in 1969, and the Committee's estimates for 1970 and 1971, are shown below (see also Annex I, tables 9 and 10).

European^{a/} totals for particle board (including non-wood particle board) in
1969 and estimates for 1970 and 1971

(million m.t.)

Year	Production		Imports		Exports		Domestic requirements ^{d/}	
	Volume	% change from previous year	Volume	% change from previous year	Volume	% change from previous year	Volume	% change from previous year
1969	6.69	+ 16.2	1.04	+ 17.2	0.96	+ 19.4	7.09	+ 16.2 ^{e/}
1970	7.55	+ 13.0	1.12	+ 7.7	1.05	+ 9.6	7.63	+ 7.6
1971	8.17	+ 8.2	1.20 ^{b/}	+ 7.1	1.28 ^{c/}	+ 22.0	8.10	+ 6.1

a/ Excluding the USSR

b/ Import requirements

c/ Export prospects

d/ Stock changes may not have been taken into account

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

76. Compared with an increase of 16% between 1968 and 1969, Europe's production of particle board is estimated to rise by 13% in 1970 and by a further 8% in 1971 to reach 8.2 million tons (12.6 million m³) in the latter year. An even more marked slowing down is indicated by the estimates of domestic requirements. To a large extent this is the result of developments forecast in the Federal Republic of Germany, by far the largest user of particle board. There, apparent consumption of particle board rose by 21% between 1968 and 1969, while the forecast is for an increase of only 4% in domestic requirements in the current year and 3½% in 1971. For the rest of Europe, the corresponding figures are 14% in 1969, 9½% in 1970 and 7½% in 1971.

77. Europe's imports are estimated to grow by over 7½% in 1970, while import requirements of 1.20 million tons (1.84 million m³) in 1971 are 7% higher than estimated 1970 imports. Exports are forecast to rise by 9½% in 1970; export prospects in 1971 of 1.28 million tons (1.97 million m³) are no less than 22% above the export estimate for 1970.

78. The expected increase in imports between 1969 and 1971 in the United Kingdom, Europe's biggest importing country, more than offsets its estimated reduction of production during the period caused by the shutdown of a number of mills.

79. In considering the estimates for 1971, the Committee noted that several countries had taken a cautious view of consumption prospects and that a considerable volume of new capacity was scheduled to come on stream. The sharp rise in Europe's export prospects next year was very largely due to the high estimates provided by Austria and Finland, and it was pointed out that these countries' estimates could be more realistically termed export availabilities rather than export prospects. Accordingly, growth in Europe's exports next year may be less strong than suggested by the total of export prospects.

(iii) Fibreboard

80. Totals of production, trade and domestic requirements of fibreboard in Europe, excluding the USSR in 1969, and the Committee's estimates for 1970 and 1971, are shown below:

European^{a/} totals for fibreboard in 1969 and estimates for 1970 and 1971
(million m.t.)

Year	Production		Imports		Exports		Domestic require- ments ^{d/}	
	Volume	% change from previous year	Volume	% change from previous year	Volume	% change from previous year	Volume	% change from previous year
1969	2.92	+ 5.4	0.93	+ 5.6	1.01	+ 3.6	2.82	+ 5.3 ^{*e/}
1970	3.10	+ 6.2	0.97	+ 4.3	1.03	+ 2.0	3.04	+ 7.8
1971	3.15	+ 1.6	1.00 ^{b/}	+ 3.1	0.98 ^{c/}	- 4.9	3.18	+ 4.6

a/ Excluding the USSR

b/ Import requirements

c/ Export prospects

d/ Stock changes may not have been taken into account

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

81. After rising by $5\frac{1}{2}\%$ in 1969, production of fibreboard in Europe is estimated to increase by 6% in 1970 but by only a further $1\frac{1}{2}\%$ in 1971. The marked slowdown foreseen for next year is principally due to the forecast of a fall of 60,000 tons compared with 1970 in Sweden, where a major mill is going out of production. Excluding Sweden, the estimated increase of production in the rest of Europe amounts to $4\frac{1}{2}\%$ in 1971.

82. The estimated rate of growth of domestic requirements of fibreboard in 1970 of nearly 8% is higher than the increase in apparent consumption in 1969 and the long-term average during the 1960s. Above average growth is foreseen in Romania and Poland, as well as a marked recovery in the United Kingdom. The estimate for European domestic requirements of 3.2 million tons in 1971 is $4\frac{1}{2}\%$ more than that for 1970.

83. Europe's fibreboard imports and exports are expected to show moderate growth in 1970 to reach new record levels. In 1971, import requirements are forecast to be 3% above the estimated 1970 imports. Export prospects, on the other hand, are forecast to be 5% down on 1970. The estimated fall of 60,000 tons in Sweden's output is expected to be reflected by a similar decline in its exports. The aggregate of other European countries' prospects for exports next year is slightly above the estimate for 1970.

84. On the basis of the Committee's estimates, it appears that Europe's trade in fibreboard may reach a turning point in 1971. Imports may, for the first time ever, exceed exports. Canada's exports are estimated to double in 1971 compared with 1970 to 105,000 tons, but it is expected that most of this increase will be directed to the United States market.

(iv) Prices for wood-based panel products

85. Prices for wood-based panel products in Europe in mid-1970 were in general higher than a year previously, but the increases that have occurred appear to be, in the main, part of the overall inflationary trend observed in many western European countries. Prices for birch plywood have been very firm, rising to new peak levels, but the market for "red" plywoods has been passing through an unsettled period, partly the outcome of the devaluation of the currencies of some West African countries at the time of the French devaluation. While those for particle board and fibreboard, following the partial recovery from the depressed levels to which they fell in 1967 and 1968, showed on the whole only small additional gains over the year up to autumn 1970.

86. A modest recovery of prices for softwood plywood has been taking place during 1970 in the United States, following last year's steep decline. Prices for particle board, and to a less marked extent for fibreboard have shown fluctuations similar to those for softwood plywood, but those for hardwood plywood, the United States market for which is becoming increasingly influenced by imports from Asia, have remained remarkably stable.

(f) Wood-based panel products (periodic surveys)

87. The Committee discussed the drafts of the medium-term survey of the market for wood-based panel products and of the fourth biennial survey of the structure of, and raw material consumption by, the wood-based panel products industries, undertaken in accordance with its adopted programme of work for 1969/70 (TIM/Working Paper No.149).

(i) Medium-term survey of the market for wood-based panel products

88. In 1969, European apparent consumption of the three main wood-based panel products (plywood and blockboard, particle board and fibreboard) reached 19.6 million m³. Compared with 1965 (the average of 1964-66), this represented an increase of about 46%. On a per capita basis, the increase over the same four-year period amounted to 41%. By comparison, per capita Gross National Product (GNP) is estimated to have risen in Europe by 16%, while the construction of dwellings, one of the main outlets for panel products, was at the same level in 1969 as in 1965. The average annual growth rates of GNP and of consumption of wood-based panel products between 1965 and 1969 were both somewhat higher than those foreseen for the period 1965 to 1970 in "European Timber Trends and Prospects, 1950 to 1980, An Interim Review". The growth rate in consumption of plywood and of fibreboard since 1965 has been reasonably close to the trends predicted in the Interim Review, but that of particle board has surpassed expectations.

89. The Secretariat provided some preliminary indications of the results of the enquiry circulated among countries participating in the Committee's work on the prospects for consumption, production and trade of wood-based panel products, and for costs and prices during the period up to 1973. The active participation of the competent industry federations in producing information for the survey was gratefully acknowledged. Generally speaking, the countries which have so far replied to the enquiry considered that activity in construction and the furniture industries, the two largest outlets for panel products, would show some expansion between 1969 and 1973. Growth in the

utilization of particle board in these and other end-use sectors was expected to be strong or very strong in most countries, while less active growth was foreseen in the consumption of plywood, blockboard and compressed fibreboard (hardboard). Little change or even declines were forecast in the use of non-compressed fibreboard (insulation board).

(ii) Fourth biennial survey of the structure of, and raw material consumption by, the wood-based panel products industries

90. The total reported production capacity for the three main European (excluding USSR) panel products industries^{1/} was 13.7 million tons or 21.3 million m³ in 1969. This compared with a reported production capacity of 11.3 million tons or 17.6 million m³ in 1967 and represents an increase of 20% over the two-year period. No satisfactory global trends up to 1971 can be discerned with the information currently available.

91. The European plywood and blockboard industries registered an annual growth rate of about 5% between 1967 and 1969 to reach a total reported production capacity of 4.5 million m³ in the latter year. In 1967 the reported production capacity had been 4.1 million m³. On the basis of available forecasts a similar rate of growth is expected to be maintained up to 1971.

92. The fibreboard industries in Europe, with a reported production capacity of 3.4 million tons (5.4 million m³) in 1969, registered an annual growth rate of 5% between 1967 and 1969, but this rate of growth is expected to decline significantly during the period up to 1971.

93. The particle board industries were, with the plywood and blockboard industries, the two sectors with a reported capacity increase much in excess of the capacity increase forecast at the time of the previous (1963) survey. The reported production capacity in 1969 for Europe's particle board industries stands provisionally at 7.4 million tons (11.4 million m³), but this figure is likely to be revised upwards. This provisional total represents an annual growth rate of 15% between 1967 and 1969, whereas in the previous survey the forecast was for an annual growth rate of only 10%. Until more complete figures become available, it is not possible to determine the likely trend up to 1971.

^{1/} The plywood and blockboard, fibreboard and particle board industries

94. With regard to average production capacity per plant, the average size of particle board plants in reporting countries increased appreciably between 1967 and 1969 and is expected to continue to increase up to 1971. For fibreboard and plywood and blockboard, on the other hand, the average plant size appears to be remaining steady over this four-year period.

95. The Committee expressed its thanks to the Secretariat for the commendable manner in which the draft of the capacity survey had been prepared, despite the numerous difficulties encountered, some of which were considered in the subsequent discussion on the draft survey. The Committee agreed that the latter should be consolidated along with the draft of the medium-term survey and published as a Supplement to the Timber Bulletin for Europe.

96. In discussing the draft of the biennial survey, the Committee considered that the guidelines for describing the concept of production capacity, which were adopted for use in the present survey by the 8th session of the Joint FAO/ECE Working Party on Forest and Forest Products Statistics, were a significant step towards finding a satisfactory definition of production capacity (FAO/ECE/STATS/98, para. 26). Much more work was needed, however, before an internationally acceptable definition could be established, which would provide a sound basis for the estimation of internationally comparable capacity data. Of the various reasons for seeking to determine production capacity, the Committee concurred with the view expressed by the Joint Working Party that the most widely accepted purpose was to obtain short-term forecasts of the possibilities to expand production.

97. The Committee discussed the intervals at which its surveys on structure and raw material consumption should be undertaken. An interval of three years, which had been proposed in order to synchronize the surveys with the triennial medium-term surveys on the market for panel products, was considered too long to retain continuity between one survey and the next. The Committee agreed, therefore, to collect a limited quantity of data on production capacity annually, with a more detailed enquiry being sent out at three-year intervals. The Committee requested the Secretariat to inform the FAO Committee on Wood-Based Panel Products of this decision and to explore with FAO the best way of ensuring that its capacity surveys would continue to be synchronized with those of FAO, whose Committee normally meets at two-yearly intervals.

98. The Committee also requested the Secretariat to send out future enquiries in sufficient time to allow for the return and collation of replies and the circulation of drafts of the surveys well in advance of the meeting. It was felt that their consideration at the Committee's sessions would benefit from careful study by delegates beforehand.

99. The Committee's attention was drawn to the report of the above-mentioned Working Party (FAO/ECE/STATS/98) in paragraph 19 of which it recommended that the term "production" should be related to total production and not just to production for sale or distribution outside the producing enterprise. It was pointed out that a significant part of total production was lost due to wastage. The fibreboard industry, for example, has a wastage of at least 5% of total production. As a consequence, a comparison between production capacity and production could lead to erroneous conclusions regarding capacity utilization.

100. The view was also expressed that data on deliveries to domestic markets could usefully be collected and published, since the use of apparent consumption figures, calculated by adding imports to production and deducting exports, could lead to serious misinterpretation of short-term market trends.

101. The Committee recognized that these problems of production and especially production capacity were most complex and that no quick solution was likely to be reached. It agreed to refer them and certain other matters of a technical nature raised by delegates in the course of discussions, to the newly formed provisional Group of Experts on the Wood-Working Industries as questions meriting high priority, and to advise the Group of Experts to contact the appropriate bodies with interests in this question, notably the FAO Committee on Wood-Based Panel Products, the European Federation of Associations of Fibreboard Manufacturers (FEROPA), the European Federation of Associations of Particle Board Manufacturers (FESYP) and the European Federation of Plywood Manufacturers (FEIC).

102. In conclusion, the Committee invited countries to send their comments on the drafts of both the medium-term survey and the biennial survey to reach the Secretariat by 15 November and urged those countries that had not yet done so to complete and return the relevant questionnaires and enquiry forms, so that the published version of these surveys could be as comprehensive as possible.

Transport, handling and packaging of forest products: recent developments
(Item 8 of the Agenda)

103. The Committee's co-ordinator, Mr. Felix Palmer (United Kingdom) introduced his report on recent developments in the field of the transport, handling and packaging of forest products (TIM/Working Paper No. 150). He underlined the enormous upsurge in deliveries of softwood, either length packaged or truck bundled, which has been assisted by the fact that neither in the exporting nor in the importing countries could labour any longer be found to handle loose timber economically. In the absence of automatic sorting machines the length-sorting capacity of the industry had been insufficient, and consequently the greatest increase had so far been in exports of truck bundled timber.

104. Various aspects concerned with the truck bundling and length packaging of softwood were raised, and the opinion was expressed that, despite the convenience of the former to the distributive trade in the importing countries, in the long term shippers and importers were likely to give preference to length-sorted packages.

105. The Committee noted that little progress had been made towards the standardization of package sizes, despite the decisions adopted in 1968 by the softwood trade, and it expressed the hope that this problem would be treated as a matter of urgency by the producing countries.

106. During the discussion a number of other aspects of the situation were raised including the prospects for the increased use of LASH (lighter alongside ship) and also the likely availability of suitable vessels for carrying packaged cargoes.

107. The Committee felt that the time had come to consider the orientation of its future activities in the field of the transport, handling and packaging of forest products. On the basis of the suggestions made by its co-ordinator, the Committee agreed that fields deserving consideration included the need for speedier movement of timber to and from the ship and the better standardization of package sizes, and also the problem of the transport of hardwoods and wood-based panel products.

108. The Committee noted that the work of its co-ordinator had been impeded by the delay in obtaining replies from some of the appointed country correspondents, and it invited countries to look into ways of rectifying this unsatisfactory situation.

109. The Committee expressed its warm thanks and appreciation to Mr. Palmer for his work and requested him to consider ways of implementing the proposals for future activities which had been agreed upon.

Utilization sector studies (Item 9 of the Agenda)

(a) Study on the utilization of forest products in construction: progress report

110. The Committee was informed of progress made on the study on the utilization of forest products in construction, which was being combined in the initial phase of data collection with work on the enquiry into the comparability of national building codes and the regulations relating to the behaviour of **wood products in fire**

(TIM/Working Paper No. 151). It noted with regret that a number of countries had not yet replied to the enquiry which had been circulated to gather relevant information on the subject of the study.

111. The Committee also took note of the new timetable for the study, which had been revised on account of the difficulties encountered in the course of the study and which envisaged the preparation of a preliminary draft for consideration at a second unofficial meeting of correspondents tentatively scheduled to be held in the second quarter of 1971. The study would be submitted in a finalized form in time for the Timber Committee's consideration at its session in October 1971.

112. The Committee underlined the very great importance which it attached to this study, as construction is the single most important end-use sector of forest products. The Committee believed that on account of this fact, every endeavour should be made to make the study as comprehensive as possible. It was with this in mind that the Committee strongly urged those countries that had not yet done so to reply to the Secretariat's enquiry as soon as possible.

(b) The use of timber underground in mines: progress report

113. The Committee's appointed rapporteur, Mr. G. Hampson (United Kingdom), made a progress report on the study on the use of timber underground in mines (TIM/Working Paper No. 152).

114. Although there were significant differences reported by countries in the level of timber consumption per unit of coal produced, the general trend was downwards. Amongst the reasons for the substitution of timber by other materials were the high cost of timber, the strength of competing materials and the ease with which they could be installed.

115. The Committee welcomed the report and expressed its gratitude to Mr. Hampson for his fine work. It noted that the final report would be produced in the same form as the progress report but expanded to include statistical data and information on those countries from which returns were still awaited. To this effect, the Committee stressed that those countries that had not so far returned the enquiry should do so as soon as possible.

Economic aspects of, and productivity in, the wood-processing industries
(Item 10 of the Agenda)

(a) Symposium on the production and industrial utilization of eucalyptus, Portugal: report

116. The Committee expressed its satisfaction with the results of the Symposium on the production and industrial utilization of eucalyptus, held in Lisbon, Portugal, from 29 June to 3 July 1970 (TIM/EUCALYPTUS/21, TIM/Working Paper No. 153).

117. The Committee noted that the industrial requirements of short-fibre wood, particularly by the pulp and particle board industries, are expected to continue to expand strongly, and availabilities in Europe seem to be insufficient to meet this demand fully in the future. The Committee further noted that eucalyptus species, if grown under the right ecological and economic conditions as exist in many parts of the Mediterranean basin, could help to overcome the predicted shortfall in supply.

118. The Committee noted that the use of short-fibre pulps has been increasing very fast everywhere and that for western Europe it was estimated that about 25% of the virgin pulp was short-fibre pulp and, if northern Europe were excluded, the percentage for the rest of western Europe was 35% to 40%. In the United States, the corresponding figure was 25% and in Japan no less than 58%. For specific purposes such as printing and writing paper and corrugating medium, hardwood pulp was preferred over other grades.

119. The Committee took note of the conclusion of the Symposium in which it invited the Committee to bring to the attention of the appropriate international organizations the benefits to be derived from further international consultations concerned with eucalyptus; particularly in the developing countries for many of which the establishment of eucalyptus plantations and industries using this material could be of considerable interest in meeting their own growing demands for the products of short-fibre wood, and in a few instances, in developing their forest products exports.

120. The Committee agreed that the papers presented at the Symposium should be published in a Supplement to the Timber Bulletin for Europe.

121. The Committee expressed its deep gratitude to the Government of Portugal for the excellent way in which the Symposium and the study tour which was included in the programme had been organized.

(b) Symposium on substitution of and by forest products: preparations

122. The Committee was informed of preparations for the Symposium on substitution of and by forest products. It agreed that the scope of the proposed Symposium, as set out in the Provisional Outline, was too wide and that this might prejudice the results.

123. Several delegations expressed the wish that the Symposium should be postponed, one reason being to allow for relevant parts of the study on the utilization of forest products in construction, when available, to be used as background material.

124. The Committee noted with appreciation the various offers received from countries for their experts to prepare background papers for use at the Symposium.

125. In view of the comments referred to above regarding the scope of the Symposium and the complexity of the subject, the Committee approved the convening of a preparatory meeting of experts as a matter of urgency, to be held if at all possible before the end of the present year. This would allow for the convening of the Symposium itself before the end of 1971. The preparatory meeting should draw up a provisional agenda and consider organizational details for the Symposium in the light of the Committee's discussion.

(c) Symposium on co-ordination between forestry and the wood-using industries: preparations

126. The Committee was informed of the outcome of the ad hoc preparatory meeting of experts for the Symposium on co-ordination between forestry and the wood-using industries by its Chairman, Mr. G. Giordano (Italy), (FAO/ECE/CO-ORDINATION/3). Mr. Giordano mentioned the dichotomy between the problems of foresters which were long-term and the problems of the forest industries which were in the main short-term, and the benefit that would derive from a confrontation between the two sides. The Committee's attention was directed to the provisional outline for the Symposium adopted at the meeting and reproduced in its report.

127. The Committee was informed of the discussions on the preparations for the Symposium at the 15th session of the European Forestry Commission, which met in September 1970. The Commission had considered that the scope of the provisional outline, as proposed by the meeting of experts, was too large and that attention should be concentrated on items 1 to 3, leaving items 4 to 6 for marginal discussion, that item 1 was of the most fundamental importance and that the confrontation between forest industrialists and foresters should be the main feature of the Symposium. It was also hoped that the Symposium would arrive at some suggestions for linking the biological possibilities of the forest with the technological changes occurring in the forest industries, so that both could be fully exploited. The Committee fully agreed with the European Forestry Commission that attention should be mainly focused on items 1 to 3 of the provisional outline.

128. The Committee gladly accepted the offer of Finland to act as host to the Symposium. It agreed that the Symposium should take place in the first half of 1972, which should provide sufficient time for the thorough preparations required.

Study tours and training courses (Item 11 of the Agenda)

(a) Training course and study tour on the application and uses of tropical hardwoods, Italy

129. The Committee was informed of the outcome of the training course and the study tour on the applications and uses of tropical hardwoods which had taken place from 12 to 25 October 1969 (TIM/Working Paper No. 154). The course which was held in the Wood Institute at San Michele all'Adige was conducted by Mr. G. Giordano (Italy), and had been attended by some 26 participants from seven European countries and one West African country.

130. Mr. H. Blétry (France) presented a report on the extremely interesting study tour during which participants from ten countries visited wood-working industries and import and trade establishments in the region Venice-Trento-Milan. The training course and study tour had offered participants a valuable opportunity to extend their knowledge and to exchange experiences of the utilization of tropical hardwoods.

131. The Committee recognized that practical problems of application often constituted a major obstacle to expansion in the utilization of tropical woods, particularly of the lesser-known species. It agreed that training courses and study tours of this kind could play a useful role in furthering the rational utilization of these woods, which cover an increasing part of the region's requirements of certain types of forest products.

132. The Committee expressed its deep gratitude to the Italian Government and to Mr. Giordano for the excellent way in which the training course and the study tour had been organized.

(b) Study tour in France

133. The Committee heard a report from Mr. E. Clicheroux (Belgium) on the study tour in France from 21 to 26 September 1970. The tour was attended by some 40 participants from 15 countries, including experts from the host country and a representative of the Secretariat. The tour began in Paris and covered south-west France with a well-balanced programme which gave participants the opportunity to see numerous aspects of forestry and the wood-working industries.

134. The Committee expressed its deep gratitude to the Government of France for the excellent way in which the tour had been organized.

(c) Study tour in Sweden, scheduled for 1971

135. The Committee was informed by the Swedish delegation of the provisional programme for the Committee's 1971 study tour, which it intends to hold in Sweden from 7 to 11 June 1971. The tour will include visits to forest and wood-working industries in central and southern Sweden. Note was taken of a suggestion by one delegation that visits to plants producing plywood and particle board would be of considerable interest for participants.

Special lecture (Item 12 of the Agenda)

136. Two papers were presented to the Committee on the subject of the changing structure of the forest products trade and industry in Europe (TIM/Working Paper No.155). Mr. L. Nellbeck (Sweden) drew attention to the efforts being made in industry and trade,

in both exporting and importing countries, to rationalize operations in the face of mounting costs and the difficulties of securing adequate profit margins. The pressure of rising costs has been reduced through the exploitation of economies of scale in harvesting and production and through the rationalization of handling and transportation methods.

137. Mr. Nellbeck considered that fewer and more standardized assortments of sawnwood would have to be adopted, if the timber industry was to control rising costs and to remain competitive with industries producing other materials for joinery and building. In achieving this, national and international organizations would play an important part.

138. Mr. J. Bakker (Netherlands) described some provisional conclusions of a study, still in progress, on structural developments in his country's softwood trade. The study was launched in order to determine whether the probable future developments in the trade were likely to upset the economic structure of the trade itself, as well as the adjoining production and consumption sectors. He expressed the view that the local dealer will continue to hold a very strong position in the distributive wholesale softwood trade in the Netherlands, and that the threat that this function might be taken over by either producers or end-users of softwood was negligible, at least in the foreseeable future. A considerable number of establishments in the distributive wholesale trade suffer from unfavourable economies of scale and in the longer term, a number of middle-sized establishments could disappear and/or amalgamate.

139. In the ensuing discussions, attention was drawn to a number of factors which influence the structure of the trade, or might do so in the future, including the pre-slinging of packaged cargoes, finger-jointing and the reduction in the number of lengths, grading by end-uses and the do-it-yourself market.

140. The Committee expressed its deep appreciation to the two speakers for their most interesting papers, which it agreed should be published as a Supplement to the Timber Bulletin for Europe.

Programme of work and priorities, 1970/71 to 1975/76 (Item 13 of the Agenda)

141. On the basis of Commission Resolution 8(XXV), the Committee adopted its programme of work and priorities, 1970/71 to 1975/76 as set out in Tables A and B of Annex III (TIM/Working Paper No. 156).

142. The Committee warmly welcomed the offer of the Federal Republic of Germany to organize a study tour in 1971/72, while noting that a programme had not yet been established. It also noted with satisfaction that the USSR is considering the possibility of holding a seminar on the mechanization of forest work to take place in 1975/76.

143. Several delegates stressed the increasing need for work on the problem of improving the international comparability of grading rules for sawn softwood. The Committee decided to refer the matter to its Office-holders for consideration at their meeting next April when proposals could be formulated, for submission to the Committee's 29th session, on possible steps to be taken, and the scope for collaboration with other organizations with interests in this field, including the International Organization for Standardization (ISO).

144. The Committee took note of tentative offers from a number of countries to collaborate in the organization of a training course on the application and uses of plywood and blockboard, included in the programme of work for 1971/72. The Committee requested the Secretariat to contact these countries and explore further with them the possibilities of arranging the course. The Committee also requested countries organizing national training courses in this field, which were open to foreign participation, to supply the relevant information to the Secretariat for circulation.

145. The Committee noted the proposal that a second training course on the application and uses of tropical hardwoods might be held in 1973/74, and requested the Secretariat to investigate the prospects with possible host countries.

146. The Committee noted the proposal that in the second Interim Review of European Timber Trends and Prospects, scheduled for 1973/74, much more detailed attention should be paid to supply aspects and to resource appraisals in the European region. It was pointed out that the European Forestry Commission at its recent session had agreed to keep these very important problems under surveillance. The Committee also noted the Office-holder's proposal that an ad hoc Group of Experts be set up to advise on suitable forecasting methodologies, and it was felt that the above problems could usefully be included within the proposed group's terms of reference.

Programme of work and priorities for 1970/71 (Item 14 of the Agenda)

147. The Committee adopted its programme for 1970/71 as set out in Annex II.

Other business (Item 15 of the Agenda)

148. The Committee's attention was drawn to a recent study undertaken by the United Kingdom Forestry Commission entitled "Imports and Consumption of Wood Products in the United Kingdom 1950-1967, with forecasts to 1980".

149. The Committee expressed its thanks to the United Kingdom for making copies of the report available, and in view of the increasing interest in studies of this type, and of the Committee's own activities in the field of medium and long-term forecasting, repeated the previously expressed wish that countries undertaking work of a similar nature should make the results available to the Committee.

Date of the next session (Item 16 of the Agenda)

150. The Committee requested the Secretariat to reserve, if possible, 11 to 15 October 1971 for its twenty-ninth session.

Films

151. The Committee thanked the delegation of the USSR for the films "Karpathian Forests" and "Mechanization of Logging Operations in the USSR", which were shown during the session.

TABLEAU No. 1

SCIAGES RESINEUX
(y compris planches de caisserie)

TABLE No. 1
SAWN SOFTWOOD
(including boxboards)

(1 000 m³ (s))

Country	IMPORTS - IMPORTATIONS				EXPORTS - EXPORTATIONS				Pays		
	Actual	Estimates made in:		Estimations faites en:		1969	1970	1971 ^{b/}		1970	1971 ^{b/}
		1969	1970 ^{a/}	Oct. 1969	Oct. 1970						
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)
Austria	14		£/	15	14	3 636	3 406	3 100	3 350	3 250	Autriche
Belgium-Luxembourg	968	888	888	850	900	58	47*	47*	55	50	Belgique-Luxembourg
Bulgaria	175	187*	187*	175*	175*	61	70*	70*	60*	60*	Bulgarie
Czechoslovakia	177	167	167	160	170	586	570	570	545	570	Tchécoslovaquie
Denmark	1 192	1 168*	1 168*	1 250*	1 050*	24	£/	£/	25*	25*	Danemark
Federal Republic of Germany	3 469	3 450	3 450	3 600	3 800	266	250	250	250	250	République fédérale d'Allemagne
Finland	1	£/	£/	£/	£/	4 396	4 275	4 322	4 750	4 750	Finlande
France	1 725	1 575	1 500	1 750	1 800	202	215	220	190	190	France
German Democratic Republic ^{c/}	1 270*	1 355*	1 355*	1 270*	1 270*	92*	£/	£/	90*	90*	République démocratique allemande
Greece	445	500	550	480	480	-	£/	£/	-	-	Grèce
Hungary	958	1 075	1 121	943	935	129	84	93	145	24	Hongrie
Ireland	3 495	3 350*	3 74*	3 50*	3 50*	1	£/	£/	-*	-*	Irlande
Italy	2 750	2 691	2 560	2 700	2 600	11	£/	£/	-	-	Italie
Netherlands	248	234	234	300	250	122	117	117	100	125	Pays-Bas
Norway	204	220	200	200	200	710	715	600	800	700	Norvège
Poland	7	£/	£/	15	20	394	400	400	400	450	Portugal
Portugal	786	750	700	610	580	1 238	1 197	1 224	1 270	1 270*	Roumanie
Romania	316	320	350	350	360	33	£/	£/	40	40	Espagne
Sweden	7 814	7 942	8 410	7 750	8 250	6 786	6 658	6 424	6 540	6 540	Suède
Switzerland	86	£/	£/	150	150	3	£/	£/	55	70	Turquie
Turkey	47	140*	140*	45*	45*	7 919	8 000	8 000	7 800	7 800	Royaume-Uni
United Kingdom						274	230	230	200	250	URSS
USSR						-	234*	234*	-	-	Yougoslavie
Yugoslavia						-					Autres ^{d/}
Others ^{e/}											TOTAL EUROPE
TOTAL EUROPE	26 613	26 259	26 527	26 184	26 718	26 971	26 468	25 901	26 697	26 526	
Canada	-	-	-	-	-	1 288	1 355	1 705	1 800	1 820	Canada
United States	2 250*	2 125*	2 125*	2 250*	2 250*	627	565	565	784*	700*	Etats-Unis
Other e/						515	467*	467*	450*	450*	Autres e/
GRAND TOTAL	28 863	28 384	28 652	28 434	28 968	29 401	28 855	28 638	29 731	29 496	TOTAL GENERAL
						28 863	28 384	28 652	28 434	28 968	IMPORTATIONS
						538	471	14	1 297	528	BALANCE
Canada	412	415	470	375	400	15 867	16 520	17 110	15 500	16 500	Canada
United States	13 646	14 016	14 016			12 406	2 336	2 336	2 634*	2 634*	Etats-Unis

a/ Import requirements
b/ Export prospects
c/ Includes sleepers

d/ Iceland and Malta, and footnote f/
e/ Europe and USSR export/import figure
f/ Included in "others"

g/ Besoins d'importations
h/ Prévisions d'exportations
i/ Y compris les traverses

d/ Islande et Malte, et note f/
e/ Chiffre des exportations/importations de l'Europe et de l'URSS
f/ Compris dans "autres"

TABLE No.2
SAWN SOFTWOOD
(including boxboards)

SOCIAGES RESINEUX
(y compris planches de caisserie)

TABLEAU No.2

(1 000 standards)

Country	IMPORTS - IMPORTATIONS			EXPORTS - EXPORTATIONS			Pays				
	Actual	Estimates made in: October 1969		Réelles	Estimates made in: October 1969						
		1969	1970 ^{a/}		1969	1970 ^{b/}					
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)
Austria	3	f/	f/	3	3	778	729	663	717	696	Autriche
Belgium-Luxembourg	207	190	190	182	193	12	10*	10*	12	11	Belgique-Luxembourg
Bulgaria	38	40*	40*	37*	37*	13	15*	15*	13*	13*	Bulgarie
Czechoslovakia	38	36	36	34	36	126	122	122	117	122	Tchécoslovaquie
Denmark	255	250*	220*	268*	225*	5	f/	f/	5*	5*	Danemark
Federal Republic of Germany	743	738	728	770	813	57	54	54	54	54	République fédérale d'Allemagne
Finland	-	f/	f/	-	-	941	915	925	1 017	1 017	Finlande
France	369	337	321	375	385	43	46	47	41	41	France
German Democratic Republic ^{c/}	272*	290*	290*	272*	272*	20*	f/	f/	19*	19*	République démocratique allemande
Greece	95	107	118	97	103	-	f/	f/	-	-	Grèce
Hungary	205	230	240	202	200	28	18	20	31	5	Hongrie
Ireland	80	75*	80*	75*	75*	2	f/	f/	-*	-*	Irlande
Italy	748	675	700	675	690	2	f/	f/	-	-	Italie
Netherlands	589	576	548	578	556	2	2	2	3	3	Pays-Bas
Norway	53	50	50	64	54	26	25	25	21	27	Norvège
Poland	44	47	43	43	43	152	153	128	171	150	Pologne
Portugal	1	f/	f/	3	4	84	86	86	86	96	Portugal
Romania	-	-	-	-	-	265	256	262	272	272*	Roumanie
Spain	168	161	150	131	124	7	f/	f/	9	9	Espagne
Sweden	20	20	20	20	20	1 452	1 425	1 375	1 400	1 400	Suède
Switzerland	68	68	75	75	77	5	f/	f/	4	2	Suisse
Turkey	-	f/	f/	-	-	1	f/	f/	12	15	Turquie
United Kingdom	1 672	1 700	1 800	1 658	1 765	1 695	1 712	1 712	1 670	1 670	Royaume-Uni
USSR	-	-	-	-	-	59	49	49	43	54	URSS
Yugoslavia	18	f/	f/	32	32	-	50*	50*	-*	-*	Yougoslavie
Others ^{d/}	10	30*	30*	10*	10*	-	-	-	-	-	Autres ^{d/}
TOTAL EUROPE	5 696	5 620	5 679	5 604	5 717	5 773	5 665	5 543	5 717	5 681	TOTAL EUROPE
Canada	-	-	-	-	-	276	290	365	385	389	Canada
United States	-	-	-	-	-	134	121	121	168	150	Etats-Unis
Others ^{e/}	480*	455*	455*	480*	480*	110	100*	100*	96*	96*	Autres ^{e/}
GRAND TOTAL	6 176	6 075	6 134	6 084	6 197	6 293	6 176	6 129	6 366	6 316	TOTAL GENERAL
Imports						6 176	6 075	6 134	6 084	6 197	IMPORTATIONS
Balance						+ 117	+ 101	- 5	+ 282	+ 119	BALANCE
Canada (Total)	88	89	101	80	85	3 396	3 535	3 662	3 317	3 531	Canada
United States	2 920	3 000	3 000			515	500	500	564	564	Etats-Unis

a/ Iceland and Malta, and footnote f/
b/ Import requirements
c/ Europe and USSR export/import figure
d/ From/to Europe
e/ Includes sleepers
f/ Included in "others"
g/ Besoins d'importations
h/ Prévisions d'exportations
i/ Y compris les traverses
j/ Y compris dans "autres"
k/ Islande et Malte, et note f/
l/ Chiffre des exportations/importations de l'Europe et de l'URSS
m/ Compris dans "autres"

TABLE No.3
SAWNWOOD - SCIAGES RESINEUX
1970 and 1971: estimates
SAWNWOOD
1970 and 1971: estimates
SCIAGES
1970 et 1971: estimations
TABLEAU No.3
SAWN HARDWOOD - SCIAGES FEUILLUS

Country (1)	SAWN SOFTWOOD - SCIAGES RESINEUX										SAWN HARDWOOD - SCIAGES FEUILLUS										Pays (20)
	Production					Domestic requirements - Besoins nationaux					Production					Domestic requirements - Besoins nationaux					
	1969 (2)	1970 (3)	1971 (4)	1969 (5)	1970 (6)	1971 (7)	1969 (8)	1970 (9)	1971 (10)	1969 (11)	1970 (12)	1971 (13)	1969 (14)	1970 (15)	1971 (16)	1969 (17)	1970 (18)	1971 (19)			
	1000 m ² (s)	1000 m ² (s)	1000 m ² (s)	1000 m ³ (s)	1000 m ³ (s)	1000 m ³ (s)	1000 m ³ (s)	1000 m ³ (s)	1000 m ³ (s)	1000 m ³ (s)	1000 m ³ (s)	1000 m ³ (s)	1000 m ³ (s)	1000 m ³ (s)	1000 m ³ (s)	1000 m ³ (s)	1000 m ³ (s)	1000 m ³ (s)			
Austria	5 021	4 950	4 950	1 075	1 059	1 059	1 519	1 600	1 700	325	342	364	194	211	213	198	206	215	Autriche		
Belgium	350	350	350	75	75	75	1 250	1 200	1 200	268	257	257	285	285	285	490	480	480	Belgique		
Luxembourg	38	40*	40*	8	9*	9*	38*	40*	40*	8*	9*	9*	20	20*	20*	20*	20*	20*	Luxembourg		
Bulgaria	843	845*	845*	180	181*	181*	957*	960*	960*	205*	205*	205*	700*	675*	650*	673*	650*	625*	Bulgarie		
Czechoslovakia	2 915	2 900*	3 000*	624	621*	642*	2 504*	2 515*	2 600*	536*	538*	557*	609	645	650	580*	580*	580*	Tchécoslovaquie		
Denmark	460*	460*	460*	98*	98*	98*	1 633*	1 660*	1 560*	349*	355*	334*	380*	380*	380*	383*	370*	370*	Danemark		
Federal Republic of Germany	7 497	7 700	7 800	1 604	1 648	1 669	10 701	11 050	11 350	2 290	2 365	2 429	1 928	1 900	1 900	2 105	2 110	2 110	République fédérale d'Allemagne		
Finland	6 536	7 125	7 125	1 399	1 525	1 525	2 290	2 415	2 415	490	517	517	112	175	175	140	145	145	Finlande		
France	5 400*	5 450*	5 500*	1 156*	1 167*	1 177*	6 900*	7 000*	7 100*	1 477*	1 498*	1 520*	3 225*	3 400*	3 500*	3 250*	3 350*	3 450*	France		
German Democratic Republic	1 020*	1 020*	1 020*	218*	218*	218*	2 196*	2 200*	2 200*	473*	471*	471*	400*	400*	400*	485*	485*	485*	République démocratique allemande		
Greece	201	145	150	43	31	32	580	597	630	124	128	135	114	95	100	135	141	160	Grèce		
Hungary	463	467	467	99	100	100	1 292	1 265	1 378	276	271	295	493	520	530	468	470	475	Hongrie		
Ireland	35	35*	35*	8	8*	8*	406*	385*	385*	87*	82*	82*	17	20*	20*	65*	70*	70*	Irlande		
Italy	491	400	450	105	86	96	4 180	3 735	3 830	895	800	820	1 667	1 670	1 700	2 307	2 300	2 350	Italie		
Netherlands	83	82	82	18	18	18	2 660	2 740	2 770	569	586	593	220	215	210	488	490	480	Pays-Bas		
Norway	1 794	1 900	1 900	384	407	407	1 921	2 100	2 025	411	449	433	19	20	20	80	80	80	Norvège		
Poland	6 151	6 150	6 180	1 316	1 316	1 323	5 632	5 550	5 680	1 205	1 188	1 216	982	925	940	994	964	975	Pologne		
Portugal	1 450	1 700	1 800	310	364	385	1 200	1 300	1 350	278	278	289	120	130	100	130	150	130	Portugal		
Romania	2 694	2 660	2 660*	577	569	569*	1 456*	1 390*	1 390*	312*	297*	297*	2 568	2 560	2 560*	1 823*	1 940*	1 940*	Roumanie		
Spain	1 485	1 560	1 620	318	334	347	2 203	2 130	2 160	471	456	462	675	665	670	882	865	850	Espagne		
Sweden	11 405	11 680	11 915	2 441	2 500	2 550	4 720	5 235	5 465	1 010	1 120	1 170	254	250	250	326	325	325	Suède		
Switzerland	1 240	1 250	1 250	265	268	268	1 520	1 600	1 600	325	342	342	104	200	200	250	250	250	Suisse		
Turkey	1 983	2 300	2 333	424	492	499	1 980	2 250	2 270	424	482	486	602	650	815	583*	605	750	Turquie		
United Kingdom	1 294	280	280	63	60	60	8 443	8 330	8 530	1 807	1 783	1 825	573	510	500	1 310	1 260	1 260	Royaume-Uni		
Yugoslavia	1 780	1 780	1 800	381	381	385	1 592*	1 730*	1 700*	341*	370*	364*	1 283	1 350	1 400	533	715*	745*	Yougoslavie		
TOTAL EUROPE	61 629	63 229	64 012	13 189	13 535	13 700	69 773	70 977	72 288	14 932	15 189	15 472	17 524	17 871	18 188	18 698	19 021	19 320	TOTAL EUROPE		
USSR	93 500*	25 677	24 300	26 000	20 009*	20 009*	85 580*	9 000	10 000	18 314*	1 926	2 140	16 500*	800	850	16 710	660	730	URSS		
Canada	25 677	24 300	26 000	20 009*	20 009*	20 009*	85 580*	9 000	10 000	18 314*	1 926	2 140	16 500*	800	850	16 710	660	730	Canada		
United States	69 575	69 575	69 575	14 888	14 888	14 888	79 702*	17 059*	17 059*	17 059*	17 059*	19 970	19 970	19 970	20 160*	20 160*	20 160*	20 160*	Etats-Unis		

TABLE No. 4

SAWN HARDWOOD

SCIAGES FEUILLETS

TABLEAU No. 4

(1000 m²(s))

Country	IMPORTS - IMPORTATIONS										EXPORTS - EXPORTATIONS																				
	TOTAL					Temperate-zone wood Essences des régions tempérées					Tropical wood Essences tropicales					TOTAL					Temperate-zone wood Essences des régions tempérées					Tropical wood Essences tropicales					
	Actual Réelles	Estimates Estimations	1970	1971 ^a	1969	Actual Réelles	Estimates Estimations	1970	1971 ^a	1969	Actual Réelles	Estimates Estimations	1970	1971 ^a	1969	Actual Réelles	Estimates Estimations	1970	1971 ^b	1969	Actual Réelles	Estimates Estimations	1970	1971 ^b	1969	Actual Réelles	Estimates Estimations	1970	1971 ^b	1969	
(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)	(18)	(19)	(20)													
Austria	47	60	39	117	48	54	12	120	8	14	53	58	58	58	19	18*	58	58	58	19	18*	58	58	58	19	18*	58	58	58	19	18*
Belgium-Luxembourg	243	230	117	110	110	110	120	120	126	120	37	35	35	35	17*	17*	17*	17*	17*	17*	17*	17*	17*	17*	17*	17*	17*	17*	17*	17*	
Bulgaria	3	4	3	4	2	4	-	-	-	-	27	25*	25*	25*	25*	25*	25*	25*	25*	25*	25*	25*	25*	25*	25*	25*	25*	25*	25*	25*	
Czechoslovakia	86	90*	27	25*	25*	25*	65*	65*	59	65*	32	60	66	66	66	66	66	66	66	66	66	66	66	66	66	66	66	66	66	66	
Denmark	352	350	179	180	180	180	170	170	173	170	102	100*	100*	100*	90*	90*	90*	90*	90*	90*	90*	90*	90*	90*	90*	90*	90*	90*	90*	90*	
Federal Republic of Germany	19	20	14	14	14	14	6	6	5	6	77	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	
Finland	338	325	52	45	35	35	280	300	286	300	313	375	375	375	375	375	375	375	375	375	375	375	375	375	375	375	375	375	375	375	
France	85*	85*	55*	55*	55*	55*	30*	30*	30*	30*	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..
German Democratic Republic	58	46	60	56*	44*	58*	2*	2*	2*	2*	78	97	97	97	97	97	97	97	97	97	97	97	97	97	97	97	97	97	97	97	
Greece	53	47	45	47	45	45	27*	27*	27*	27*	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
Hungary	50	50*	23*	23*	23*	23*	70	50*	90	70	22	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	
Ireland	662	650	670	600	600	600	180	180	162	180	14	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	
Italy	281	300	119	120	120	120	20	20	22	20	14	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	
Netherlands	62	60	40	40	40	40	20	20	22	20	12	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	
Norway	22	54	22	54	54	50	20	20	23	20	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	
Poland	30	20	7	7	7	7	20	20	23	20	642 ^d	620 ^d	620 ^d	620 ^d	620 ^d	620 ^d	620 ^d	620 ^d	620 ^d	620 ^d	620 ^d	620 ^d	620 ^d	620 ^d	620 ^d	620 ^d	620 ^d	620 ^d	620 ^d	620 ^d	
Portugal	212	200	164	160	160	140	40	40	48	40	25	25	25	25	25	25	25	25	25	25	25	25	25	25	25	25	25	25	25	25	
Romania	97	100	72	75	75	75	25	25	25	25	25	25	25	25	25	25	25	25	25	25	25	25	25	25	25	25	25	25	25	25	
Spain	75	75	57	55	55	55	20	20	18	20	25	25	25	25	25	25	25	25	25	25	25	25	25	25	25	25	25	25	25	25	
Sweden	772	750	308	290	290	290	460	470	464	460	4	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	
Switzerland	10	15	15	15	15	15	15	15	10	15	623	650	650	650	650	650	650	650	650	650	650	650	650	650	650	650	650	650	650	650	
Turkey	5	5*	5*	5*	5*	5*	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..
United Kingdom	5	5*	5*	5*	5*	5*	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Yugoslavia	5	5*	5*	5*	5*	5*	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Others ^c	5	5*	5*	5*	5*	5*	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..
TOTAL EUROPE	3 562	3 534	1 984	1 992	1 978	1 978	1 542	1 594	1 578	1 542	2 243	2 360	2 424	2 360	2 329	2 329	2 265	2 265	2 329	2 329	2 329	2 329	2 329	2 329	2 329	2 329	2 329	2 329	2 329	2 329	
USSR	266	260	225	150	195	80	75	85	80	75	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Canada	305	280	225	150	195	80	75	85	80	75	483	375	400	400	400	400	400	400	400	400	400	400	400	400	400	400	400	400	400	400	
United States	1 051	260	280	150	195	80	75	85	80	75	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..

a/ Import requirements

b/ Export prospects

c/ Iceland, Malta

d/ Excludes Romanian exports of boxboards

a/ Besoins d'importations

b/ Prévisions d'exportations

c/ Islande, Malte

d/ Non compris les exportations de planches de caisserie de la Roumanie

PULPWOOD

Domestic supply and requirements

1969 - actual figures
1970-1971 - estimated

(1000 m³ (r))

BOIS DE TRITURATION

Approvisionnement et besoins nationaux

1969 - chiffres réels
1970-1971 - estimations

TABLE NO. 6

TABLEAU NO. 6

Country (1)	DOMESTIC SUPPLY - APPROVISIONNEMENT NATIONAL												DOMESTIC REQUIREMENTS - BESOINS NATIONAUX												Pays (26)
	TOTAL			Round and split Rondins et quartiers						Wood residues, chips and particles Déchets, plaquettes et particules de bois			TOTAL			Round and split Rondins et quartiers						Wood residues, chips and particles Déchets, plaquettes et particules de bois			
				Coniferous Résineux			Broadleaved Feuillus									Coniferous Résineux			Broadleaved Feuillus						
	1969	1970	1971	1969	1970	1971	1969	1970	1971	1969	1970	1971	1969	1970	1971	1969	1970	1971	1969	1970	1971	1969	1970	1971	
(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	3 671	3 941	4 300	1 736	1 971	2 206	465	560	650	1 470	1 410	1 444	4 523	5 021	5 520	1 897	2 274	2 538	1 179	1 325	1 511	1 447	1 422	1 471	Autriche
Belgium/Luxembourg	700	700	700	260	250	250	240	250	250	200	200	200	1 788	1 800	1 850	605	600	600	777	800	850	406	400	400	Belgique-Luxembourg
Bulgaria	900*	950*	1 000*										900*	950*	1 000*										Bulgarie
Czechoslovakia	3 691	3 479	3 570	2 831	2 772	2 800	642	447	500	218	260	270	2 716	2 809	2 820	2 348	2 392	2 395	182	197	200	186	220	225	Tchécoslovaquie
Denmark	560*	600*	640*										500*	540*	580*										Danemark
Federal Republic of Germany	8 904	9 550	9 950	3 596	4 050	4 350	2 654	2 800	2 850	2 654	2 700	2 750	10 413	11 200	11 700	4 321	4 900	5 200	3 061	3 100	3 200	3 031	3 200	3 300	République fédérale d'Allemagne
Finland	23 300	24 700	25 900	15 200	16 200	17 100	4 000	4 300	4 500	4 100	4 200	4 300	24 900	25 500	26 500	16 500	17 000	17 700	4 000	4 300	4 600	4 400	4 200	4 200	Finlande
France	10 190	10 910	11 800	3 323	2 985	3 500	4 594	5 425	5 800	2 273	2 500	2 500	10 000	10 650	11 400	4 000	3 900	4 100	4 000	4 500	4 950	2 000	2 250	2 350	France
German Democratic Republic	2 910*	3 110*	3 310*										3 900*	4 100*	4 300*										République démocratique allemande
Greece	106	122	150	30	40	50	66	70	85	10	12	15	106	122	150	30	40	50	66	70	85	10	12	15	Grèce
Hungary	761	815	850	62	60	75	626	680	700	73	75	75	582	693	770	225	220	255	295	410	450	62	63	65	Hongrie
Ireland	160*	170*	180*										160*	170*	180*										Irlande
Italy	3 411	2 350	2 450	72	100	100	1 826	1 500	1 600	1 513	750	750	5 002	4 300	4 500	685	700	700	2 608	2 600	2 800	1 709	1 000	1 000	Italie
Netherlands	547	613	715	186	233	295	129	140	160	232	240	260	667	713	795	468	499	565	133	144	160	66	70	70	Pays-Bas
Norway	4 500	5 100	5 300	3 335	3 800	4 000	265	300	300	900	1 000	1 000	8 000	8 100	8 300	6 450	6 450	6 650	550	550	550	1 000	1 100	1 100	Norvège
Poland	4 271	4 459	4 410	2 555	2 589	2 420	616	718	700	1 100	1 152	1 290	4 027	4 121	4 200	2 483	2 519	2 440	444	450	470	1 100	1 152	1 290	Pologne
Portugal	1 530	1 910	1 990	700	670	700	800	1 200	1 250	30	40	40	1 530	1 840	1 840	700	650	600	800	1 150	1 200	30	40	40	Portugal
Romania	2 800	3 060	3 300*	1 520	1 640	1 750*	880	1 020	1 150*	400	400	400*	2 300*	2 580*	2 820*	1 520*	1 646*	1 750*	380*	540*	670*	400*	400*	400*	Roumanie
Spain	2 617	2 762	2 877	1 379	1 475	1 530	940	980	1 025	298	307	322	2 756	2 910	3 040	1 518	1 635	1 710	940	960	1 000	298	315	330	Espagne
Sweden	37 156	39 810	40 600	25 730	27 500	27 250	4 538	5 050	5 600	6 888	7 260	7 750	34 766	37 450	38 750	23 307	25 000	25 250	4 572	5 200	5 750	6 887	7 250	7 750	Suède
Switzerland	1 113	1 183	1 222	600	600	630	180	235	235	233	348	357	1 200	1 545	1 530	835	1 030	1 000	150	240	260	215	275	270	Suisse
Turkey	320	635	905	300	550	820	20	85	85	-	-	-	320	635	905	300	550	820	20	85	85	-	-	-	Turquie
United Kingdom	1 351	1 440	1 510	800	890	900	250	260	290	301	290	320	1 708	1 800	1 860	1 049	1 140	1 140	260	270	300	399	390	420	Royaume-Uni
Yugoslavia	2 425*	2 325*	2 375*										2 355	2 350*	2 400*	986			985			384			Yougoslavie
TOTAL EUROPE	117 894	124 694	129 994										125 119	131 899	137 710										TOTAL EUROPE
USSR																									URSS
Canada	86 055	90 867	96 229	63 917	67 559	72 207	4 080	4 310	4 610	18 058	18 998	19 412	82 275	87 375	93 482	61 094	64 764	69 297	3 900	4 130	4 420	17 281	18 481	19 765	Canada
United States																									Etats-Unis

BOIS DE MINE et GRUMES DE RESINEUX

PITPROPS and CONIFEROUS LOGS

(1000 m³ (r))

Country	FITPROPS - BOIS DE MINE					CONIFEROUS LOGS - GRUMES DE RESINEUX					Pays		
	Domestic requirements Besoins nationaux		Imports - Importations			Imports - Importations		Exports - Exportations					
	1969	1970	1971	1969	1970	1971 ^{a/}	1969	1970	1971 ^{a/}	1970		1971 ^{b/}	
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)
Austria	75	73	73	-	-	-	76	100	95	148	50	48	Autriche
Belgium-Luxembourg	255	250	250	4	-	-	84	80	75	64	65	50	Belgique-Luxembourg
Bulgaria	314*	300*	300*	30	30*	-	299	300*	300*	21	30*	30*	Bulgarie
Czechoslovakia	525*	500*	475*	-	-	-	10	10*	10*	192	130	90	Tchécoslovaquie
Denmark	-	-	-	-	-	-	-	-	-	152	70*	30*	Danemark
Federal Republic of Germany	1 134	1 000	900	234	200	200	455	200	200	228	20	20	République fédérale d'Allemagne
Finland	-	510	490	-	6	-	313	400	400	44	20	20	Finlande
France	300*	275*	270*	7	-	-	13	5	5	160	160	160	France
German Democratic Republic	13*	14	14	-	-	-	-	-	-	-	-	-	République démocratique allemande
Greece	777	760	730	567	560	560	57	32	38	9	-	-	Grèce
Hungary	-	-	-	-	-	-	636	670	700	-	-	-	Hongrie
Iceland	-	-	-	-	-	-	-	-	-	-	-	-	Islande
Ireland	-	-	-	-	-	-	7	7*	7*	-	-	-	Irlande
Italy	49	50	50	31	30	30	854	550	600	0	2	2	Italie
Netherlands	61	50	40	10	10	-	48	45	40	2	35	35	Pays-Bas
Norway	2 390	2 420	2 420	-	-	-	13	125	125	52	35	35	Norvège
Poland	25*	25	25*	-	-	-	1	10	10	1	1	1	Pologne
Portugal	804*	800*	800*	-	-	-	-	-	-	-	-	-	Portugal
Romania	770	750	720	-	-	-	1	1	1	5	5	5	Roumanie
Spain	10	10	10	-	-	-	26	25	25	233	400	400	Espagne
Sweden	483*	500*	500*	-	-	-	95	80	80	160	150	130	Suède
Switzerland	1 090	1 040	950	250	270	200	-	8	8	1	5*	10*	Suisse
Turkey	291	275*	250*	1	-	-	-	-	-	20	-	-	Turquie
United Kingdom	-	-	-	-	-	-	-	-	-	-	-	-	Royaume-Uni
Yugoslavia	-	-	-	-	-	-	-	-	-	2	-	-	Yougoslavie
TOTAL EUROPE	9 876	9 602	9 247	1 133	1 106	1 026	3 170	2 857	2 958	1 474	1 143	1 031	TOTAL EUROPE
USSR	117	113	119	-	-	-	1 313	1 300	1 200	760	400	380	URSS
Canada	-	-	-	-	-	-	189	-	-	430	-	-	Canada
United States	-	-	-	-	-	-	-	-	-	10 496	-	-	Etats-Unis

a/ Import requirements

b/ Export prospects

a/ Besoins d'importations

b/ Prévisions d'exportations

TABLE No. 9

PANEL PRODUCTS
Production and Domestic Requirements

PANNEAUX
Production et besoins nationaux

TABLEAU No. 9

Country (1)	PLYWOOD - CONTREPLAQUES a/						PARTICLE BOARD - PANNEAUX DE PARTICULES b/						FIBREBOARD - PANNEAUX DE FIBRES						Pays (26)							
	PRODUCTION			DOMESTIC REQUIREMENTS BESOINS NATIONAUX			PRODUCTION			DOMESTIC REQUIREMENTS BESOINS NATIONAUX			PRODUCTION			DOMESTIC REQUIREMENTS BESOINS NATIONAUX										
	Total			of which: Compressed dont : Comprimés			Total			of which: Compressed dont : Comprimés			Total			of which: Compressed dont : Comprimés										
	Actual Réelle	Estimates Estimations		Actual Réels	Estimates Estimations		Actual Réelle	Estimates Estimations		Actual Réels	Estimates Estimations		Actual Réelle	Estimates Estimations		Actual Réels	Estimates Estimations			Actual Réels	Estimates Estimations					
1969	1970	1971	1969	1970	1971	1969	1970	1971	1969	1970	1971	1969	1970	1971	1969	1970	1971	1969	1970	1971	1969	1970	1971			
(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)	(18)	(19)	(20)	(21)	(22)	(23)	(24)	(25)			
	1 000 m ³						1 000 m.t. - 1 000 t.m.						1 000 m.t. - 1 000 t.m.													
Austria	13	18	19	16	18	18	258	292	390	190	214	234	88	91	92	75	80	80	42	47	48	38	44	44	Autriche	
Belgium-Luxembourg	70	55	55	92	90	90	600	610	615	360	370	375	62*	70	70	52*	60	60	75	80	80	55	60	60	Belgique-Luxembourg	
Bulgaria	73	75*	75*	60*	63*	63*	111	125*	140*	102*	115*	130*	39*	45*	50*	33*			28*	30*	30*				Bulgarie	
Czechoslovakia	149	160*	165*	145*	153*	160*	163*	173*	183*	160*	173*	188*	88	90*	90*	76			108*	115*	120*				Tchécoslovaquie	
Denmark	25	25*	25*	110*	100*	100*	110*	125*	140*	140*	155*	170*	5*	5*	5*	-*	-*	-*	70*	70*	70*				Danemark	
Federal Republic of Germany	615	630	630	726	750	760	2 041	2 340	2 405	2 272	2 360	2 438	271	280	280	234	240	240	390	410	420	341	355	355	République fédérale d'Allemagne	
Finland	684	710	730	85	92	95	207	247	325	122	130	136	228	237	252	184	197	210	79	80	87	64	68	74	Finlande	
France	614	657	690	692	697	710	637	806	887	812	874	942	263	276	290	224			230	236	240				France	
German Democratic Republic	31*	30*	30*	50*	50*	50*	350*	375*	400*	400*	420*	445*	95*	100*	105*	95*	100*	105*	145*	150*	155*	145*	150*	155*	République démocratique allemande	
Greece	35*	40*	45*	48*	57*	57*	16*	20*	25*	25*	25*	30*	12*	13	13	12*	13	13	18*	18	18				Grèce	
Hungary	21	25	25	30	37	40	70	78	93	73	88	102	47	46	50	47	46	50	72	66	70	72	66	70	Hongrie	
Ireland	5*	5*	5*	28*	30*	30*	33*	35*	40*	21*	25*	30*	20	20*	20*	20	20*	20*	10*	10*	10*	9*	9*	9*	Irlande	
Italy	380	420	450	305	300	320	504	573	600	445	465	470	85*	90	100				80	100	110				Italie	
Netherlands	70	70	70	186	205	180	68	65	58	254	260	254	32	40	40	23	30	30	178	180	180	145	150	150	Pays-Bas	
Norway	23*	25*	25*	45*	48*	48*	132	135	185	114	115	140	157	158	170	114	116	128	112	118	134	97	105	121	Norvège	
Poland	184	178	177	200	217	220	206	216	228	232	253	279	251	270	297	191	205	210	230	258	289	181	201	213	Pologne	
Portugal	21	25*	30*	21*	25*	30*	61*	65*	70*	38*	40*	40*	34*	35*	35*				2*	2*	2*				Portugal	
Romania	285	290	290*	176*	177*	177*	171	200*	200*	141*	165*	165*	208	273	273*	197	263	263*	164*	233*	233*	153*	223*	223*	Roumanie	
Spain	240	250	250	223	226	220	230	289	325	220	292	315	45	56	60	42*	52	55	56	60	52	52	55	55	Espagne	
Sweden	68	80	110	115	120	125	210	244	292	204	234	273	741	740	680	652	650	610	324	330	330	283	285	285	Suède	
Switzerland	24	26	27	68	76	80	180	231	260	208	257	292	32	32	33	25	26	27	39	40	41	32	34	35	Suisse	
Turkey	49	61	75	40	61	75	28*	30*	35*	28*	30*	35*	30	37	37	28			37	47	53				Turquie	
United Kingdom	29	30	25	1 007	1 080	1 175	193	162	146	384	400	422	39	37	40	21*	24	26	304	332	360	240	260	282	Royaume-Uni	
Yugoslavia	156	170	190	136*	155*	175*	108	117	130	149*	170*	190*	51	60	65	48			27*	35*	40*				Yougoslavie	
TOTAL EUROPE	3 864	4 055	4 213	4 604	4 827	4 998	6 687	7 553	8 172	7 094	7 630	8 095	2 923	3 101	3 147	2 512*	2 687*	2 725*	2 820	3 043	3 180				TOTAL EUROPE	
USSR	1 875						1 110						599			310*									URSS	
Canada	2 004	1 795	2 120	1 700	1 455	1 725	164	181	207	195	211	204	406	360	435	202	180	230	378	332	359	187	162	165	Canada	
United States							1 840*						2 387			1 245										Etats-Unis

a/ Including blockboard
b/ Including non-wood particle board

a/ Y compris les panneaux lattés
b/ Y compris les panneaux de particules non dérivés du bois

PANEL PRODUCTS
Imports and Exports

PANNEAUX
Importations et exportations

TABLEAU No. 10

Country	PLYWOOD - CONTRE-PLAQUES ^{a/}						PARTICLE BOARD - PANNEAUX DE PARTICULES ^{b/}						FIBREBOARD - PANNEAUX DE FIBRE										Pays			
	Imports			Exports			Importations			Exportations			Imports		Importations				Exports		Exportations					
	Actual	Estimates		Actual	Estimates		Actual	Estimates		Actual	Estimates		Total	Of which: Compressed		Total		Of which: Compressed								
	Réelles	Estimations		Réelles	Estimations		Réelles	Estimations		Réelles	Estimations		Réelles	Estimations	Réelles	Estimations	Réelles	Estimations	Réelles	Estimations	Réelles	Estimations				
1969	1970	1971 ^{c/}	1969	1970	1971 ^{d/}	1969	1970	1971 ^{c/}	1969	1970	1971 ^{d/}	1969	1970	1971 ^{c/}	1969	1970	1971 ^{d/}	1969	1970	1971 ^{c/}	1969	1970	1971 ^{d/}			
(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)	
	1 000 m ³						1 000 m.t. - 1 000 t.m.						1 000 m.t. - 1 000 t.m.													
Austria	4	5	2	2	3	3	5	7	7	75	84	162	2	2	2	2	2	2	42	46	32	38	38	38	Autriche	
Belgium-Luxembourg	57	55	55	35	20	20	33	35	35	274	280	285	47	45	45	32	30	30	34	35	35	29	30	30	Belgique-Luxembourg	
Bulgaria	-	-*	-*	12	12*	12*	-	-*	-*	9	10*	10*	-	-*	-*	-	-	-	11	20*	25*	6	6	6	Bulgarie	
Czechoslovakia	21	16	20	25	23	25	15	15	16	18	15	11	32	32	35	24	25	30	12	8	6	11	6	5	Tchécoslovaquie	
Denmark	93	80*	80*	6	5*	5*	43	45*	50*	13	15*	20*	65	65*	65*	..	..	..	-	-*	-*	..	..	..	Danemark
Federal Republic of Germany	181	180	190	70	60	60	158	182	195	152	162	162	148	160	170	132	140	140	29	30	30	25	25	25	République fédérale d'Allemagne	
Finland	-	-	-	612	618	635	-	-	-	90	117	188	1	-	-	1	-	-	151	157	165	125	129	136	Finlande	
France	111	128	115	64	88	95	131	117	111	30	49	55	39	36	30	28	-	-	72	75	80	64	64	64	France	
German Democratic Republic	19*	20*	20*	-*	-*	-*	42*	45*	45*	..	-*	-*	48*	50*	55*	..	..	..	..	-*	-*	..	..	..	République démocratique allemande
Greece	13	17	12	-	-	-	6	1	-	-	-	-	5	5	5	4	3	5	2	-	2	2	-	1	Grèce	
Hungary	9	12	15	-	-	-	9	13	13	5	3	4	25	29	20	25	29	20	-	-	-	-	-	-	Hongrie	
Iceland	2	2*	2*	-	-*	-*	3	5*	5*	-	-*	-*	2	2*	2*	..	..	..	-	-*	-*	-	-*	-*	Islande
Ireland	24	25*	25*	-	-*	-*	5*	5*	5*	15*	15*	15*	3	3*	3*	..	..	..	13	13*	13*	..	..	..	Irlande
Italy	11	10	10	104	130	140	4	2	-	97	110	130	23	21	20	..	..	..	5	11	10	..	..	..	Italie
Netherlands	134	155	125	18	20	15	195	208	208	11	13	13	166	160	160	135	130	130	18	20	20	10	10	10	Pays-Bas	
Norway	22	23	23	-	-	-	11	10	10	28	30	55	3	3	3	3	3	3	48	43	39	20	14	10	Norvège	
Poland	22	45	50	6	6	7	53	55	52	33	18	-	38	50	52	38	48	50	59	62	60	48	52	47	Pologne	
Portugal	1	-*	-*	1	-*	-*	-	-*	-*	23	25*	30*	-	-*	-*	-	-	-	32	33*	33*	32	32	32	Portugal	
Romania	-	-	-	109	113	113*	-	-	-	30	35	35	-	-	-	-	-	-	44	40	40*	44*	40*	40*	Roumanie	
Spain	1	-	-	18	24	30	5	3	-	-	-	10	-	-	-	-	-	-	4	-	-	..	-	-	Espagne	
Sweden	62	50	55	6	10	40	36	46	59	44	55	78	1	-	-	-	-	-	404	410	350	351	375	325	Suède	
Switzerland	45	50	53	1	-	-	33	42	52	14	16	20	9	12	12	..	9	9	3	4	4	..	1	1	Suisse	
Turkey	-	-	-	-	-	-	-	-	-	-	-*	-*	-	-	-	-	-	-	-	-	-	-	-	-	-	Turquie
United Kingdom	955	1 050	1 150	8	10*	10*	208	228	276	-	-	-	268	295	320	..	236	256	5	Royaume-Uni
Yugoslavia	6	10*	10*	26	25*	25*	41	55*	60*	-	-*	-*	1	-*	-*	..	..	..	25	25*	25*	..	..	..	Yugoslavie
TOTAL EUROPE	1 793	1 933	2 012	1 123	1 167	1 235	1 036	1 119	1 199	961	1 052	1 283	926	970	999				1 011	1 032	983				TOTAL EUROPE	
USSR		52	52	240	268	268		-	-	-	86	87		31	29	29	22	25	61	53	105	44	40	90	URSS	
Canada		85	103	400	426	492		29	29	-	-	25				..									Canada	
United States				131						19																Etats-Unis

a/ Including blockboards
b/ Including non-wood particle board
c/ Import requirements
d/ Export prospects

a/ Y compris les panneaux lattés
b/ Y compris les panneaux de particules non dérivés du bois
c/ Besoins d'importations
d/ Prévisions d'exportations

PROGRAMME OF WORK AND PRIORITIES FOR 1970/1971

12. 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 1970/1971 in implementation of its long-term programme of work and priorities, adopted at its twenty-eighth 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.)

12.1.1 Priority projects of a continuing nature

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

Authority: Timber Committee (E/ECE/TIM/69, paras. 51 - 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; E/ECE/TIM/96, paras. 12-13; 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, coniferous logs and wood-based panel products. In addition, the Secretariat publishes bi-annual market reviews covering sawn softwood, hardwoods, pulpwood, pitprops and panel products, together with quarterly statistics relating to production and trade of 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 on particular countries, commodities and market sectors; these reports are based on information collected from official and other sources and publications, which is analysed by the ECE Secretariat. A special survey will be undertaken on the market for sawnwood and sawlogs.

12.1.2 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; E/ECE/TIM/94, para. 108; E/ECE/TIM/96, para. 135).

Description: The Committee promotes study tours, training courses and visits by specialists to the forest products industries of member countries within the framework of its 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 Sweden.

12.1.3 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; E/ECE/TIM/94, paras. 14-15; E/ECE/TIM/96, paras. 15-19).

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. A Symposium will be held in the USSR in September 1971 on forest operations in mountainous regions.

12.1.4 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; E/ECE/TIM/94, paras. 16-17; E/ECE/TIM/96, paras. 20-26).

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 FAO/ECE Working

Party on Forest and Forest Products Statistics. Enquiries will be undertaken on the evaluation of indirect benefits in forestry and on conversion factors. A meeting of experts will be held on product definitions and classifications.

12.1.1 Economic aspects of, and productivity in, the woodworking industries

12.1.2 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; E/ECE/TIM/94, paras. 77, 88, 99, 101, 103, 118; E/ECE/TIM/96, paras. 8, 101, 107-9, 125, 147).

Description: Developments in the packaging, transport and handling of forest products will be kept under review. A provisional Group of Experts on the Wood-working Industries will be established on a trial basis. A meeting of experts of the proposed provisional Group of Experts will be convened to assist and advise in the preparations for the Symposium on substitution by and of forest products. The latter will be held in late 1971. Preparations will begin for the Symposium on co-ordination between forestry and the wood-using industries, scheduled for 1972. Preparations will begin for a meeting of experts to examine problems relating to the wood-based panel products industries and referred to it by the Committee. A special lecture on the "Preservation and Protection of Wood" will be given at the twenty-ninth session of the Timber Committee.

12.2 Priority projects of an ad hoc nature

Sector studies on the use of forest products in construction and on the utilization of mining timber.

Authority: (E/ECE/TIM/87, para. 108; E/ECE/TIM/92, para. 28; E/ECE/TIM/94, paras. 86-87; E/ECE/TIM/96, paras. 111, 115, 147). These studies will be completed.

Sector study on wooden railway sleepers.

Authority: Timber Committee (E/ECE/TIM/96, para. 141). This study will be initiated.

TABLE A - TIMBER COMMITTEE

Project item	1970/71	1971/72	1972/73	1973/74	1974/75	1975/76
I. Forest Products Market Continuing Activities	Annual review by the Timber Committee of the market in the ECE region for sawn softwood, hardwoods, (including tropical); pulpwood, pitprops and coniferous logs; plywood, fibreboard and particle board. Half-yearly reviews of the forest products market by the Secretariat, together with quarterly statistics relating to production, trade and prices of forest products in the region. Annual review by the Committee of developments in transport, handling and packaging of forest products. Periodic compilation and publication by the Secretariat of market reports on particular countries, commodities and market sectors.	Pulpwood and pitprops	Panel products	Sawnwood and sawlogs	Pulpwood and pitprops	Pulpwood, pitprops and coniferous logs
12.1.1	Special reviews Surveys of the structure and raw material consumption of the wood-based panel products industries	Forest products in: (a) furniture (b) joinery, doors and windows	5th Survey ^{1/}	2nd Interim Review of European Timber Trends and Prospects (jointly with FAO)	Utilization of forest and industrial residues, small-sized wood and bark	6th Survey ^{1/}
12.1.1.1	Special studies	Subjects if possible related to the Committee's special review or study for the year in question and to be selected each year from among the following or other topics that may be of current importance at the time: raw materials for plywood, rationalization of stockyards, combination with other materials, implication of tariff changes on European forest products sector, publicly, public relations and dissemination of information, structure of forest products trade and marketing, location of forest industries, accident prevention in forest industries, investment and production costs and returns, use of forest products in mass-production processes and wood preservation.	Forest products in packaging (including containers, pallets, etc.)			Production and utilization of improved wood-based panels, with particular reference to the surface covering of panels
12.2	Special lectures	Wood preservation and protection and the behaviour of wood in fires				
II.	Technical and economic aspects of the wood-working industries					
12.1.2	Study tours in the following countries:	Federal Republic of Germany	Czechoslovakia	Canada		
12.1.2	Symposia in the following countries: Subject: (Note: These symposia are organized jointly with FAO)	Finland Symposium on coordination between forestry and the wood-using industries		Economic aspects of the modernization of forest industries	Manufacture and utilization in construction of mass-produced forest products (jointly with ECE Committee on Housing, Building and Planning)	Utilization of forest and industrial residues, small-sized wood and bark
12.1.2	Training courses or seminars in the following countries: Subject:	Applications and uses of plywood and blockboards	Subject possibly connected with packaging (see above)		Subject possibly connected with construction (see above)	

^{1/} The Timber Committee agreed in principle that in future the wood-based panel products surveys would be undertaken on a triennial basis so that they could be synchronised with the Committee's triennial medium-term surveys of the market for wood-based panel products. The Committee instructed the Secretariat to discuss the practical repercussions of this change in periodicity with FAO, whose Committee on Wood-Based Panel Products has until now carried out the capacity survey jointly with the Timber Committee but on a biennial basis.

^{2/} Host country to be decided.

^{3/} An ad hoc preparatory meeting of experts will be convened as soon as possible to draw up a provisional agenda and consider organizational details for the Symposium in the light of the Timber Committee's discussions at its twenty-eighth session.

TABLE B - SUBSIDIARY BODIES

Project item	Form of activity	1970/71	1971/72	1972/73	1973/74	1974/75	1975/76
<u>Increased efficiency in forest operations</u>		Covered by the activities of the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers					
12.1.3	Continuing activities	Aims at increasing efficiency in forestry operations by: devising means for improving the organization and productivity of forest labour; exchanging information on the development of forest machinery; studying techno-economic aspects of the application of machinery and manual work, taking into account the multiple use of the forest; promoting vocational training and prevention of accidents; and completing a glossary of forest work science. These activities are carried out through study groups, training courses and symposia and with the collaboration of experts. (For particulars of the Joint Committee's programme of work see FAO/ECE/LOG/239)					
	Main meetings	USSR Symposium on forest operations in mountainous regions	Hungary 9th session of Joint Committee, including Symposium on techniques of constructing and maintaining forest roads for use by motor vehicles	Symposium on multi-purpose logging machines	10th session of Joint Committee, including a Symposium on a subject of interest to the host country	2nd symposium on ergonomics applied to forestry	11th session of the Joint Committee
	Meetings of study groups	Methods and organization of forest work (6th session) Vocational training and prevention of accidents in forest work (9th session)	Mechanization of forest work (5th session)	Vocational training and prevention of accidents in forest work (10th session) Methods and organization of forest work (7th session)	Mechanization of forest work (6th session)	Vocational training and prevention of accidents in forest work (11th session) Methods and organization of forest work (8th session)	Mechanization of forest work (7th session)
	International training courses and/or seminars	United Kingdom Work study methods	Application of new mathematical methods in planning and direction production procedures	Seminar on ergonomics applied to forestry	Pedagogic and organizational problems of forest worker training		
<u>European forest and forest products statistics</u>		Covered by the Joint FAO/ECE Working Party on Forest and Forest Products Statistics, which deals with problems referred to it by the Timber Committee and the FAO European Forestry Commission, as well as by the ECE Conference of European Statisticians					
12.1.4	Continuing activities	Problems under consideration: statistical methodology and co-ordination, matters concerning the comparability and uniformity of forest products statistics, their collection and publication; also removals statistics, labour statistics, economic indicators, price statistics, evaluation of indirect benefits of forests, forest fire statistics, computerization in forestry and forest industries					
	Meetings		9th session of Working Party		10th session of Working Party		11th session of Working Party
	Special studies and projects	<p>Conversion factors in forestry and forest industries</p> <p>Indirect benefits of forestry: project to evaluate the indirect benefits and the social role of forests (in co-operation with IUFRO)</p> <p>Labour productivity: project to evaluate trends in labour distribution and labour productivity in the forestry and forest industry sector (in co-operation with ILO)</p> <p>World Forest Inventory - review of European recommendations for possible improvements to the layout and contents</p> <p>Removal statistics and roundwood classification</p> <p>Product classification: project to review and update forest product classification and definitions for production and trade statistics (in co-operation with ISO)</p> <p>Economic indicators: project to develop standards for internationally comparable indicators covering production, trade and prices of forest products</p> <p>Comparability of forestry statistics: covering removal, production and trade statistics</p>					
	<u>Ad hoc meetings of groups of experts</u>	Product classification and definitions and foreign trade statistics			Further action to be proposed by the Working Party		

LIST OF DELEGATES

Chairman: Mr. K. Ronge (Sweden)
Vice-Chairman: Mr. N. Dumitrescu (Romania)
Mr. A. Madas (Hungary)

AUSTRIA

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Mr. Thomas STEMBERGER Permanent Conference of Presidents of Chambers
of Agriculture, Vienna
Mr. Friedrich LEHR Secretary, Trade Union of Woodworkers, Vienna

BELGIUM

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Mr. Lodewyk BOSSELAERS Conseiller économique, Ministère des affaires
économiques, Brussels
Mr. Marcel MAELFEYT Secrétaire général, Fédération belge du commerce
d'importation du bois, Brussels

BULGARIA

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de Bulgarie, Genève

BYELORUSSIAN SSR

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Mr. Trevor CHARLES Commercial Secretary (Timber), Canadian High
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Mr. David TAYLOR Commercial Secretary (Timber), Canadian Embassy,
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Mr. Urbain GOULET Technical Counsellor (France), Paris
Mr. William TOWNSLEY Market Development Director (UK), Council of
Forest Industries of British Columbia, London

CZECHOSLOVAKIA

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Mrs. Maria VONDRACKOVA	Commercial Director, LIGNA, Prague
Mr. Julius PERLAC	Directeur, Institute d'Etat de la Recherche du bois, Bratislava
Mr. Ladislav CERNY	Deuxième secrétaire, Représentation permanente de la République socialiste tchécoslovaque, Genève

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Mr. Enno MAMMEN	Section Chief, Federal Ministry of Food, Agriculture and Forestry, Bonn
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Mr. Gerd SCHAAR	First Secretary, Permanent Mission, Geneva
Mr. Ruediger KREIENKAMP-RABE	Adviser, Federal Ministry of Economy, Bonn

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Mr. Urpo RINTAKOSKI	Managing Director, Finnish Sawmill Owners' Association, Helsinki
Mr. Paavo MIETTINEN	Deputy Managing Director, Finnish Sawmill Owners' Association, Helsinki
Mr. Ola OLAVINEN	Deputy Managing Director, Oy. Wilh. Schauman Ab. Jyväskylä

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Mr. Paul RODARY	Directeur, Fédération nationale du bois, Paris
Mr. Pierre NASS	Président, Fédération des importateurs de bois du Nord, Paris
Mr. Jean-Marc ANGELLOZ	Délégué général, Fédération des pâtes à papier, Paris

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Mr. Knut RONGE	Former Managing Director, Swedish Wood Exporters' Association, Stockholm
Mr. Lars STRANGH	Managing Director, Swedish Wood Exporters' Association, Stockholm
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Mr. Martin SÖDERLIND	Managing Director, Swedish Wallboard Manufacturers' Association, Stockholm

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Mr. Dmitri LAGUTOV	Head of Gosplan Department, Kiev
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Mr. Alexandre KONYGIN	Counsellor, USSR Mission, Geneva

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Mr. Felix PALMER	Timber Trades Federation, London
Mr. George HAMPSON	Timber Consultant, Doncaster

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YUGOSLAVIA

Mr. Dusan ORFSCANIN	Professor, Belgrade
Mr. Lazar SUDJIC	Counsellor, Federal Chamber for Economy, Belgrade

UNITED NATIONS

UNITED NATIONS CONFERENCE ON TRADE AND DEVELOPMENT (UNCTAD)

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Mr. Bernt STREHLKE	Vocational Training Branch, Geneva

FOOD AND AGRICULTURE ORGANIZATION (FAO)

Mr. Stanley PRINGLE	Chief, Forest Economics and Statistics Branch, Rome
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NON-GOVERNMENTAL ORGANIZATIONS

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EUROPEAN CONFEDERATION OF WOODWORKING INDUSTRIES (CEI-Bois)

Mr. Jean-Marie MACQUART	Délégué général, Paris
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EUROPEAN FEDERATION OF ASSOCIATIONS OF PARTICLE BOARD MANUFACTURERS (FESYP)

Mr. Karl MULLER	Secrétaire général, Giessen
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FEDERATION EUROPEENNE DES INDUSTRIES DU CONTRE-PLAQUE (FEIC)

Mr. Karl MULLER	Giessen
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INTERNATIONAL CONFEDERATION OF FREE TRADE UNIONS (ICFTU)

Mr. Herbert APITZSCH	Director, Economic Department, Dusseldorf
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Representatives of Secretariats of intergovernmental organizations attending
at the invitation of the Secretariat

COMMISSION OF THE EUROPEAN COMMUNITIES

Mr. Xavier LE CHATELIER	Chef de la division forêts et produits forestiers, Brussels
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