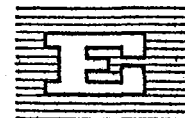


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ECONOMIC COMMISSION FOR EUROPE

Timber Committee

REPORT OF THE TIMBER COMMITTEE ON ITS THIRTY-FIRST SESSION

15-19 October 1973

As approved by the Committee

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## Introduction

1. The Timber Committee held its 31st session in Geneva from 15 to 19 October 1973. It was attended by delegates from the following ECE countries: Austria; Belgium; Byelorussian SSR; Canada; Czechoslovakia; Finland; France; German Democratic Republic; Germany, Federal Republic of; Greece; Hungary; Ireland; Italy; Netherlands; Norway; Poland; Portugal; Romania; Spain; Sweden; Switzerland; Turkey; Ukrainian SSR; USSR; United Kingdom; United States of America; Yugoslavia. Brazil and Japan participated under Article 11 of the Commission's terms of reference. A representative of the Food and Agriculture Organization of the United Nations (FAO) also attended. The European Confederation of Woodworking Industries (CEI-Bois), the European Federation of Associations of Particle Board Manufacturers (FESYP), the Fédération européenne des industries du contreplaqué (FEIC), the International Organization of Employers (IOE), the International Organization for Standardization (ISO) and the Organization of European Sawmilling Industries (OES) sent representatives. Staff officials of the Commission of the European Communities and of the Organization for Economic Co-operation and Development (OECD) attended at the invitation of the Secretariat. <sup>1/</sup>
2. The Chairman of the Timber Committee, Mr. N. Dumitrescu (Romania) opened the session and welcomed delegates to the meeting.
3. The Committee honoured the memory of Mr. M. Maelfeyt, for many years a delegate of Belgium to the Committee.

## Adoption of the Agenda (Item 1 of the Agenda)

4. The Provisional Agenda (ECE/TIM/2), presented by the Secretariat, was adopted.

## Election of officers (Item 2 of the Agenda)

5. The Committee elected Mr. A. Madas (Hungary) Chairman, and Mr. J. Bakker (Netherlands) and Mr. F. Palmer (United Kingdom) Vice-Chairmen. It expressed its gratitude to Mr. N. Dumitrescu (Romania) for his work as Chairman since the Committee's twenty-ninth session.

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

6. The Committee was addressed by Mr. J. Stanovnik, Executive Secretary of the Economic Commission for Europe, who outlined the Commission's four priority areas and situated the Committee's work in the context of ECE.

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<sup>1/</sup> Information about participants may be obtained from the Secretariat: FAO/ECE Timber Division, Palais des Nations, CH-1211 Geneva 10, Switzerland.

7. On the basis of document TIM/R.1, the Committee was informed of the discussion of its work by the Commission, and took note of the resolutions, decisions and other discussions of the Commission.

8. The Committee took note that it should bear in mind during its session Commission Resolution 1 (XXVIII) - The work of the Commission as a whole and implementation of priorities, Resolution 2 (XXVIII) - Co-operation in the examination of long-term economic trends and problems and in long-term planning and programming, Decision C (XXVIII) - Recurrent publications, Decision F (XXVIII) - Industrial co-operation, and Decision G (XXVIII) - Standardization, especially during its discussion of its long-term programme of work and priorities (item 15 of the Agenda).

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

9. The Committee was informed of the results of the 11th meeting of its office-holders held in May 1973, on the basis of document TIM/R.2. It approved the office-holders' recommendation to include stock changes in its forecast questionnaire, despite the rather unsatisfactory response to the enquiry on this subject, which had been incorporated on a trial basis into the 1973 questionnaire. It considered it desirable to collect any available information on this important subject and hoped that more countries would be able to supply data.

10. At their meeting, the office-holders suggested that the press communiqué which covered the situation of the forest products market should be supplemented by a second communiqué; this should include other items of a non-confidential nature discussed by the Committee, which would be of interest to technical and commercial circles. The Committee approved this suggestion, considering that it would help to make the work of the Committee better known, an objective recognized in ECE Resolution 4 (XXIV).

11. The Committee was informed of the preparations for the Symposium on the Planning and Development of the Tourist Industry in the ECE region which is to take place in 1975. The Committee, in view of the invitation to participate in the Symposium, considered that it had a role to play: it requested countries to send to the Secretariat by 30 November 1973, their comments on the symposium's scope and objectives as set out in document ECE/SEM.1/AC.1/1, suggestions on topics to be discussed and copies of any studies which had been undertaken on the relationship between tourism and forestry and forest products. It requested the Secretariat to prepare a paper for the Symposium, taking into account the suggestions received.

12. The Committee considered, on the basis of document TIM/R.2/Add.1, the request of the Federation of Nordic Fibreboard Industries to be allowed to participate in the Committee's activities in a consultative capacity as an international non-governmental organization. It considered there was no danger that the Federation's activities would overlap with those of the European Federation of Associations of Fibreboard Manufacturers (FEROPA) and granted this request.

Activities of continuing subsidiary bodies: Joint FAO/ECE Working Party on Forest and Forest Products Statistics, ninth session, 21 - 25 May 1973: report  
(Item 5 of the Agenda)

13. Mr. E. Clicheroux (Belgium), Chairman of the Joint Working Party, summarized the highlights of its ninth session.

14. The Committee, in approving the report of the session (TIM/EFC/WP.2/2), expressed appreciation of the overall progress made by the Working Party and urged continuing efforts on some high priority problems. It noted with satisfaction the importance attached to identifying, quantifying and evaluating the environmental benefits of the forest and the plans for future work on this project. It approved the publication, on the responsibility of the Secretariat, of an advance version of "Classification and definitions of forest products" as a working document, recognizing that further revisions might need to be made.

15. The Committee also noted the progress made on conversion factors, removal statistics and labour statistics, as well as the plan for continued work in these and other areas including statistics of costs, prices, consumption and deliveries.

16. Concern was expressed over the continued delay in publication of European forest inventory data and the Secretariat was urged to make arrangements for updating and rapid publication. The ad hoc meeting of experts on forest resource appraisal and wood supply forecasting methodologies was requested to consider how best to deal with resource data for the region.

17. The Committee confirmed the decision of its Working Party to use cubic metres rather than metric tons in reporting statistics for fibreboard.

18. The Committee took note of the discussion which had taken place about the title of the Working Party but advised that no immediate action be taken on the matter.

Activities of other international bodies relevant to the work of the Timber Committee  
(Item 6 of the Agenda)

19. The Committee was informed of aspects of the activities of FAO related to its work, including the 14th session of the Advisory Committee of Experts on Pulp and Paper which had emphasized the importance of improving its annual survey and forecast of capacity, waste paper utilization, pollution and wood supply. World Consultations on wood-based panels and on forest development in the humid tropics were planned for 1975. Appreciation was expressed for the co-operation of many European countries in supporting seminars and training centres which help to further the aims of FAO's work in developing countries.

20. The representative of the Organization for Economic Co-operation and Development (OECD) informed the Committee of a recent publication of OECD dealing with pollution by the pulp and paper industries, covering technical, legal and economic aspects. The Committee expressed great interest in the study.

Market review and prospects (Item 7 of the Agenda)

21. The Committee heard a brief statement from each delegation on recent developments in the markets for sawn softwood, hardwoods, wood-based panels, pulpwood and coniferous logs in each country. It then considered the draft prepared by the Secretariat (TIM/R.3 and addenda) for the annual forest products market review. The worksheets showing country estimates for 1973 and 1974 were completed, European totals of which are shown in Annex I.

22. The statements of the various delegations confirmed that in all countries of the region economic activity was at a high level during 1973. Many countries anticipate that this level will be maintained, at least during the early months of the coming year, although the anti-inflationary measures adopted in some countries may have a major effect in the construction sector, particularly because of the rise in interest rates.

23. In the United States, where a slow-down of dwelling construction was apparent in the middle of 1973, activity continued strongly in the other construction sectors.

24. The high level of general activity was reflected in the forest products sector, where production and consumption rose substantially. The Committee noted that forward prices in many cases more than doubled in the course of 1973, compared with the opening price levels. Developments in the international monetary situation throughout 1973 further accentuated the trend caused by demand and supply factors. It would be reasonable to conclude that the market is entering a phase of relative price stability after the unprecedented increase during 1973 when timber prices caught up with the rises in those of most other raw materials. Concern was expressed, however, about the possible repercussions as and when consumer prices reflect the forward prices now being paid.

25. With regard to sawn softwood, 1973 appears to have been marked by a strong expansion of demand in the principal importing countries. It seems that consumption in 1974 is likely to remain more or less at its present high level, although international trade may show some decline.

26. Demand for hardwood, both logs and sawn, in Europe and in North America, continued high in the latter half of 1972 and in 1973. For some qualities, mainly tropical, however, a certain easing became evident in mid-1973. Prices for the main assortments rose substantially, as supplies, in spite of markedly higher imports, could not fully meet demand. Prices of some species, notably tropical, seemed, however, to have reached a ceiling in 1973. Forecasts for 1974 indicate a further, though less marked, expansion of consumption with moderate increases in imports and decreases in exports.

27. In volume terms, by far the largest rate of growth in Europe's consumption of wood-based panels is that of particle board. European forecasts of domestic requirements in 1973 and 1974 show, respectively, increases of 1.9 million m<sup>3</sup> (11.6%) and 1.3 million m<sup>3</sup> (6.9%). For the same periods, the increases for plywood/blockboard are 619,000 m<sup>3</sup> (11.3%) and 110,000 m<sup>3</sup> (1.8%) and those for fibreboard 169,000 m.t. (5.3%) and 202,000 m.t. (6.0%).

28. After the slower growth rate obtaining in 1971 in the pulpwood using industries, 1972 saw a recovery which ~~affected differently the woodpulp and paper sector~~, where production began to rise again, the particle board sector, where progress was accelerated and the fibreboard sector, where regular growth continued. The increased consumption of pulpwood reflects the general trend in these activities. The quantities removed, on the other hand, mirrored the consumption trend during the previous year.

29. Despite intense activity in the processing industries as a result of sustained demand, the quantities of pulpwood removed do not seem to have increased in the first half of 1973. Estimates provided by delegations show that in view of the material available there should be no supply problem in the region, but there appears to be some uncertainty because of the prices offered and because forest producers in several countries tend to hold back.

30. Lastly, the trade in coniferous logs recovered throughout the region in 1972, and growth continued strongly in the first half of 1973. This expansion is no doubt related to the large quantities of deadwood in the Federal Republic of Germany. Prices, however, increased less steeply than those for sawnwood.

Medium-term survey of the markets for wood-based panels (including a survey of the structure and raw material consumption of those industries) (Item 7(f) of the Agenda)

31. The Secretariat presented the draft of the above survey (TIM/R.4 and addenda and TIM/CRP.1 and 2). The Committee noted that many countries had been unable to supply all the information requested in connexion with the survey of structure and raw material consumption, and that some countries had not yet replied to the enquiry. While recognizing the desirability of obtaining detailed information and of clarifying the many areas of confusion, it considered that future ad hoc questionnaires should be simplified so that most countries would be able to reply adequately.

32. The Committee stressed the importance of the medium-term sector studies in its programme of work and strongly urged countries to reply to the questionnaire if they had not already done so and to correct and supplement data already supplied. It recommended that the survey should be published as a supplement to the Timber Bulletin for Europe, if the Secretariat considered that sufficient data were available to make publication worth while.

Transport and handling of forest products (Item 8 of the Agenda)

33. Mr. F. Palmer (United Kingdom), the Committee's co-ordinator, made a statement on the progress achieved in the packaging and handling of forest products. He drew attention in particular to the favourable impact of packaging on the rationalization and improved organization of timber transport and trade.

Standardization (Item 9 of the Agenda)

34. Mr. F. Palmer (United Kingdom), co-ordinator, informed the Committee of the present situation with regard to standardization activities, stressing the understanding which already existed with the European Softwood Conference and the British Standards Institute. Current efforts tend to strengthen collaboration with ISO for the urgent task of harmonizing standards.

Utilization sector studies (Item 10 of the Agenda)

(a) Utilization of forest products in doors, windows and related joinery

35. The Committee considered the draft study of this end-use sector (TIM/R.7 and addenda). While it appreciated the difficulties involved, it noted that only a limited number of countries had replied to the enquiry circulated. It therefore urged countries to provide all available information as soon as possible, but in any case not later than 15 December 1973; comments and suggestions by countries should also reach the Secretariat by this date.

36. The Committee agreed that the study, after it had been consolidated and revised in the light of comments received, should be published as a supplement to the Timber Bulletin for Europe.

(b) Utilization of forest products in furniture

37. The Committee was informed of the progress made on the study, which had been brought to a provisional conclusion shortly before the Committee's session. One of the two experts who had collaborated in the work on the study, Mr. N. Dumitrescu (Romania), outlined the main conclusions and drew attention to the methodological problems involved.

38. The Committee took note of his suggestion that as a dynamic end-use sector, furniture should be given greater attention in its programme of work. It expressed its warm appreciation to the experts for their work on the study and agreed that Mr. Dumitrescu's statement should be made available to delegations. It urged countries which had not yet replied to the enquiry circulated in connexion with the study to do so as soon as possible, but not later than 15 December 1973.

Economic aspects of, and productivity in, the wood-processing industries (Item 11 of the Agenda)

(a) Ad hoc meeting of experts on industrial statistics and related matters in the wood-based panels sector

39. Mr. H. Blétry (France), who had been Chairman of the ad hoc meeting of experts on industrial statistics and related matters in the wood-based panels sector highlighted the main findings of the report (TIM/WP.3/AC.1/3).



40. The Committee recognized that it would be premature to undertake work on a multi-lingual glossary until the active round of definition work being undertaken by FAO, ECE, ISO, the CCC and the United Nations Statistical Commission was completed.

41. The Committee noted the request to keep under review the possibility of a breakdown into a category of "further processed" for all forms of wood-based panels. In this context the problem of sanded and unsanded plywood was again brought to attention.

42. Returns to the medium-term survey of the wood-based panels sector had thrown light on a number of points. Several countries could distinguish between production of veneer sheets for plywood manufacture and that for other purposes. Most countries reported production as net production ready for shipment. However, the definitions of production capacity varied greatly between countries and made questionable any comparisons. Only one or two countries were in a position to report national capacity in terms of key equipment installed.

43. The question of collecting and publishing prices of wood-based panels could be referred to the ad hoc meeting of experts which was to deal more generally with forest product prices.

44. The meeting's proposal to report fibreboard data in cubic metres instead of metric tons, supported by the Joint FAO/ECE Working Party on Forest and Forest Products Statistics, was approved by the Timber Committee.

(b) Ad hoc meeting on grading rules for sawn softwood

45. The Chairman of the ad hoc meeting, Mr. W. Townsley (Canada) informed the Committee of the discussions and recommendations of the meeting. The Committee endorsed Mr. Townsley's report (TIM/WP.3/AC.3/2) and approved the programme of action it suggested.

46. The delegation of the USSR considered that the co-ordination with the International Organization for Standardization (ISO) should be as close as possible. It was pointed out however, that after agreement had been reached on the subject in the framework of ECE, the work should be transferred to ISO.

(c) Symposium on the modernization of the sawmilling industry

47. The Committee was informed of preparations for the above symposium, on the basis of the report of the preparatory meeting (TIM/WP.3/AC.2/3), and it approved the outline suggested. It was decided to hold the symposium in Geneva in November-December 1974. The Committee accepted Switzerland's offer to arrange visits in connexion with the symposium and expressed its appreciation to that country. It also urged countries to nominate experts to provide papers for the symposium, according to the outline drawn up by the preparatory meeting.

Timber trends and prospects study: preparation for the ad hoc meeting of experts on forest resource appraisal and wood supply forecasting methodology (Item 12 of the Agenda)

48. The Committee was informed of preparations for the forthcoming meeting of experts on forest resource appraisal and wood supply forecasting methodology (on the basis of the Secretariat note TIM/R.9) and of the need felt for the meeting as an initial step in preparing for the new study on European timber trends and prospects. The Timber Committee, some of its expert groups and the FAO European Forestry Commission had all proposed that attention be given to various methodological aspects of the study, with recognition of the need to strengthen the supply side of the study predominating.

49. The Committee was informed that the USA, the USSR and Hungary were supplying documents on the methodologies of resource appraisal and supply forecasting which had been used in their regions, while a consultants' report was available covering selected countries of western Europe. The Committee thanked Sweden for its earlier tentative offer of an expert to work on the problem and invited offers from other countries.

50. In a wide-ranging discussion, the Committee reviewed the need to strengthen the methodologies of both supply and demand forecasts and to re-examine the nature of the supply forecasting problem, the accuracy of consumption forecasts and the purpose of trends and prospects studies.

51. It was recognized that the development of wood supply forecasting techniques would determine the nature of the required resource appraisals and that allowance must be made, not only for the timber inventory and growth potential, but also for the pattern and functions of the forest, the structure of the forest sector, the nature of the cost functions, technological evolution and government policy.

52. The need for supply studies was stressed. It was, however, noted that there was room for improvement in demand forecasting although the quality of estimates was more dependent on the accuracy of assumptions concerning general economic development than on refinement of the projection model. Recognition was made of the interaction of demand and supply forces and the possible use of integrated projection models.

53. The primary use of these studies as policy decision making aids was acknowledged. Hence, frequent and continuing reappraisals were useful. Indeed, an understanding of the factors involved and of trends which were developing was more important than precise forecasts of what would actually come about. In this context the complementary nature of long, medium and short term analysis was recognized. For the same reasons, it was important that projection methodologies were well defined.

Study tours and seminars (Item 13 of the Agenda)

(a) Study tour in Czechoslovakia, September 1973

54. The Committee heard a report on the study tour made in Czechoslovakia from 2 to 7 September 1973. Fifty-four participants from 14 countries attended a number

of meetings and visited several enterprises and research institutes to study the processing of hardwood, including particularly beech. They were able to see demonstrations of forest work and visited industrial installations for the chemical and mechanical processing of timber.

55. The Committee expressed its deep gratitude to the Government of Czechoslovakia for the excellent organization of the study tour, which had been extremely valuable, and for the hospitality extended.

(b) Study tour in Canada, scheduled for the summer of 1974

56. The Canadian delegation transmitted to the Committee an official invitation for a study tour to be organized from 26 May to 9 June 1974. It described the proposed programme and itinerary. The participants, whose number would be limited to 120, would attend demonstrations of skidding and hauling in the forest and would visit industrial enterprises in various regions of eastern and western Canada; demonstrations of grading and quality control were also to be held. The final programme would be communicated to the Secretariat before the end of November.

57. The Committee thanked the Government of Canada for its invitation.

(c) Seminar on the utilization of particle board and fibreboard in construction

58. The Committee was informed, on the basis of document TIM/R.10, of preparations for the above meeting which would take place in Sopron, Hungary, from 26 to 29 August 1974 and be followed by a study tour from 30 August to 3 September. It approved the outline suggested and thanked Hungary for acting as host to the seminar.

Special lectures (Item 14 of the Agenda)

59. The Canadian delegation presented four papers on stress grading of sawn softwood and conducted a grading demonstration. Mr. E. Smith described the administrative framework of the grading and the relationships between the Canadian Standards Association, the National Lumber Grades Authority, the Canadian Lumber Standards Administrative Board, and the individual grading agencies. Mr. A. Rumbold described in more detail the role of the certified agency in the grade marking and quality control programme. Mr. J. Raven described the policies and programmes needed to ensure a consistently high quality of the product. Mr. H. Voke described the engineering basis of stress grading and the methods used to assess defects while Mr. Vandermeulen gave a practical demonstration of grading.

60. Mr. K. Voronitsin (USSR) presented a report prepared by Prof. Vassiliev (USSR) on the structural and geographical influences on the industrial use of wood in the USSR.

61. The report showed that roundwood removals in the USSR were estimated to increase from some 385 million m<sup>3</sup> in 1970 to approximately 400 million m<sup>3</sup> in 1975 and to over 500 million m<sup>3</sup> towards the year 2000. This was still far from the annual growth, estimated at some 840 million m<sup>3</sup>. A substantial part of the increase would come from the vast but as yet unexploited forests of Siberia. At the same time significant changes would occur in the use of roundwood, with the share of sawnwood diminishing and that of various panels and paper products increasing.

62. Mr. D. Hair (USA), in a lecture on the outlook for timber in the United States, presented the main findings and conclusions of the comprehensive study undertaken in 1970, the latest in a series of similar studies. He analysed the factors in the demand/supply equation, possible consequences of any developments and the policy options available.

63. The Committee expressed its deep appreciation and warm thanks to all the speakers for their most interesting contributions and requested that they be published as a supplement to the "Timber Bulletin for Europe".

64. The delegation of Brazil in a statement on the forest resources of that country and their development, drew attention to the increasing efforts being made to create new, and extend existing infrastructures in the Amazon basin, potentially the largest tropical hardwood resource in the world, and where exploitation is still at an initial stage.

Long-term programme of work and priorities, 1975-1979 (Item 15 of the Agenda)

65. The Committee discussed its long-term programme of work and priorities, taking into account Commission Resolution 4(XXVIII) - Programme of work of the Commission for 1973-74 and its long-term programme of work for 1974-78 and Resolution 1(XXVIII) - Work of the Commission as a whole and implementation of priorities. It based its discussions on a Note by the Secretariat (TIM/R.13) which collated countries' replies to an enquiry on the long-term programme and formulated a draft programme. The Swedish delegation also submitted a document on this subject.

66. The Committee recognized the risk of error in its short-term analyses of market tendencies but considered that the benefits available, to all in the forestry and forest products sector, from an expert analysis of the situation published by a responsible, intergovernmental body, outweighed the danger which could be caused by analytical errors. The Swedish delegation did not fully share this opinion. While appreciating the value of a short market debate at the annual session, the delegation suggested that the Committee should reduce the amount of work undertaken in the field of short-term market surveys and expand correspondingly its activities in areas of higher priority, e.g. medium- and long-term studies. The Committee agreed that the periodicity of its studies of short-term market trends could usefully be reviewed and asked the Secretariat to ensure that there was no duplication between its publications.

67. Some countries stressed the importance of the Swedish proposals and considered that they could not be discussed without deep study. The Committee asked that the document be translated and distributed and requested countries to send their comments as quickly as possible to the Secretariat who would prepare an analysis of the subject for presentation to the Committee's 32nd session.

68. It was suggested that the Timber Committee might expand its activities in other areas such as the furniture sector, as this is a major end-use for forest products.

69. In view of these proposals for changes in the Committee's structure and programme of work, the Committee approved a recommendation by the United Kingdom that the Secretariat be invited to call informal meetings, in early 1974, to consider and make recommendations on the future structure and conduct of the Committee's programme of work, including action which might be taken in competitive areas of timber and wood fibre usage not currently being considered by the Committee or by other international bodies.

70. Many delegations pointed out the importance of packaging as an end-use for forest products. The Committee considered that even if data are available only with difficulty the importance of the sector was a major reason for studying the end-uses of forest products in packaging. In any case, it was hoped that the Committee's questionnaires would stimulate countries to collect such data. Most countries considered that this study would be an important contribution to the demand side of the Timber Trends Study. It was observed that packaging was the only major utilization sector not recently reviewed by the Committee and it was agreed to carry out this study in 1974 so that the results would be available for the Timber Trends Study in 1975.

71. The Committee recognized the importance of environmental considerations as a factor in the wood supply function and the increasing importance attached to these considerations by governments, ECE and the FAO European Forestry Commission. It therefore approved the Office-holders' suggestion that a seminar should be organized jointly with the European Forestry Commission, on the theme of "Forests, wood and their role in the environment" (the precise theme and title to be decided later), immediately before the Committee's thirty-third session. The Committee confirmed its decision to hold its thirty-third session jointly with the European Forestry Commission in autumn 1975.

72. The Committee noted that OECD had discontinued the publication of trade statistics for tropical hardwoods and agreed on the importance of these data and the necessity of publishing them. In its preparations for the World Consultation on Forest Developments in the Humid Tropics, FAO would be undertaking a detailed study of trade in these products and possibilities for future action might be resolved at that meeting.

73. The Committee was informed of the preparations for the seminar on the manufacture and utilization of mass-produced forest products. It took note of the proposed organization and programme as agreed in principle by the Working Party on the Building Industry of the ECE Committee on Housing, Building and Planning. It further noted that a meeting of the rapporteurs would be convened in Geneva from 11 to 13 February 1974, and urged countries to propose experts willing to act in such a capacity before 30 November 1973. By that date, comments and suggestions regarding the final programme, and precise topics to be discussed, which they wished the rapporteurs to take into account, should also have reached the Secretariat.

74. Bearing in mind the considerations outlined in paras. 65 to 73 above, the Committee approved its long-term programme of work and priorities for 1975, and endorsed the programme for 1976-79, as set out in Annex III, recognizing that this programme might have to be modified in the light of the discussions at its 32nd session.

75. The delegation of Switzerland offered to host the Seminar on "Forests, wood and their role in the environment", scheduled for 1975. The Committee thanked the Swiss delegation for this invitation and accepted with gratitude.

76. The Finnish delegation offered to act as host to the 11th session of the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers, to be held in 1976. The Committee accepted with gratitude the invitation of the Finnish delegation.

Programme of work and priorities for 1973/74 (Item 16 of the Agenda)

77. The Committee approved its programme of work for 1973/74, as set out in Annex II.

Other business (Item 17 of the Agenda)

78. The Canadian delegation presented a film on "A way of wood". The Committee expressed its thanks to the Canadian delegation.

Date of next session

79. The Committee agreed that its next session should take place from 14 to 18 October 1974, subject to confirmation.

Annex I

Summary table of market forecasts for 1973 and 1974

	Million units	Domestic requirements			Production			Imports			Exports		
		1972 (actual)	1973 (estimates)	1974 (estimates)	1972 (actual)	1973 (estimates)	1974 (estimates)	1972 (actual)	1973 (estimates)	1974 (estimates)	1972 (actual)	1973 (estimates)	1974 (estimates)
Sawn softwood	m <sup>3</sup> (s)	76.27	78.90	78.50	67.21	70.47	70.60	28.31	30.82	28.77	29.11 <sup>a/</sup>	31.25 <sup>a/</sup>	30.24 <sup>a/</sup>
Sawn hardwood	"	19.79	20.58	21.11	18.44	18.96	19.08	4.14	4.62	4.81	2.74	3.00	2.77
Hardwood logs	m <sup>3</sup> (r)	..	..	..	..	..	..	9.71	9.92	10.14	1.79	1.91	1.73
Plywood and blackboard	m <sup>3</sup>	5.44	6.07	6.18	4.45	4.66	4.89	2.29	2.81	2.77	1.29	1.42	1.46
Particle board	"	16.62	18.55	19.74	16.70	18.52	20.17	2.84	3.51	3.45	2.77	3.55	3.87
Fibreboard	m.t.	3.18	3.35	3.54	3.19	3.40	3.61	1.06	1.08	1.10	1.06	1.12	1.16
Pulpwood	m <sup>3</sup> (r)	135.89	149.10	157.29	126.97	141.48	151.13	13.20	13.28	13.96	8.25	9.57	8.51
Coniferous logs	"	..	..	..	..	..	..	3.50	4.53	3.80	1.66	2.06	1.66

a/ Including USSR exports

Annex II

PROGRAMME OF WORK AND PRIORITIES FOR 1973/74

The programme of work and priorities for 1973/74, set out below, covers the period between the Committee's 31st and 32nd sessions. It also contains details of the short-term programmes of work of the Committee's two main continuing subsidiary bodies, 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.

Below are listed the projects to be undertaken in 1973/74. (The joint projects for which FAO and ILO are primarily responsible do not figure on this list).

14.1.1 Forest products market reviews and allied questions (Priority A)

(a) The Committee at its 32nd session in 1974 will review the market in the ECE region for sawn softwood, hardwoods (including tropical), pulpwood, coniferous logs and wood-based panels (plywood, fibreboard and particle board).

(b) The Secretariat will prepare a review of the forest products market in the ECE region covering the period 1973 to March 1974.

(c) The Secretariat will prepare the bi-annual Timber Bulletin for Europe (in May and October) containing quarterly statistics relating to production, trade and prices of the main forest products in Europe and North America.

(d) A special review will be undertaken of the market for sawnwood and sawlogs.

(e) The special studies on the use of forest products in furniture, as well as in

(f) doors, windows and related joinery will be completed and published.

(g) The study on forest products in packaging (i.e. pallets, containers and other packaging) will be started.

(h) Work will start on the study of timber trends and prospects in the ECE region (jointly with FAO).

The Committee will review at its 32nd session developments in the

(i) transport and handling and

(j) standardization of forest products.

(k) A special lecture on a problem to be selected by the Committee will be delivered at the Committee's 32nd session.

14.1.2 Technical and economic aspects of the wood-working industries (Priority A)

Many of the Committee's activities in this field are covered by the Provisional Group of Experts on the Wood-working Industries, which will hold its 4th session during 1974 if possible.



(a) At its session the Group of Experts will consider possible follow-up activities to the study on the utilization of forest products in construction, in particular preparations for the proposed seminar on the behaviour of wood products in fire (in 1976).

(b) A symposium will be held on the modernization of the sawmilling industry.

(c) A seminar will be held in Hungary on the uses of particle board and fibreboard in construction.

(d) A study tour will be held in Canada.

#### 14.1.3 Increased efficiency in forest operations (Priority A)

The activities of the Committee in this field are covered by the work of the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers, which aims at increasing efficiency in forest operations by improving the methods of work, by the mechanization of forest work and by better training of forest workers and the prevention of accidents.

(a) The Joint Committee will hold its 10th session in France, including

(b) a symposium on a subject to be selected by the host country.

(c) The Study Group on Mechanization of Forest Work will hold its 6th session.

(d) The Study Group on Vocational Training and Prevention of Accidents in Forest Work will hold its 10th session.

(e) A seminar will be held in 1974 on the pedagogic and organizational problems of forest worker training.

#### 14.1.4 Forest and forest products statistics

The activities of the Committee in this field are covered by the work of the Joint FAO/ECE Working Party on Forest and Forest Products Statistics which deals with various statistical problems at the ECE regional level, which are referred to it by the Timber Committee, the FAO European Forestry Commission, as well as the ECE Conference of European Statisticians.

(a) An ad hoc meeting will be held to advise on the direction of the Working Party's activities concerning the environmental benefits of the forest. (Priority A).

(b) An ad hoc meeting will discuss the collection and publication of cost and price statistics. (Priority B).

(c) An ad hoc meeting will discuss a draft agreement on grading rules for sawn softwood. (Priority A).

Work will continue on projects approved by the Working Party at its 9th session, which include the following:

- (d) Classification and definitions of forest products (Priority A);
- (e) Conversion factors for forest products (Priority A);
- (f) International comparability of removal statistics (Priority A);
- (g) FAO Forest Inventory (for the ECE region) (Priority A); and
- (h) the ten-year series of forest and forest products statistics (Priority A).

Annex III

LONG-TERM PROGRAMME OF WORK AND PRIORITIES 1975-1979

Introductory note

Below are listed the projects, primarily the responsibility of the ECE Timber Committee, to be undertaken during the period 1975 to 1979, as included in the long-term programme of work and priorities adopted at its 31st session. 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. In addition to the annual sessions 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).

14.1.1 Forest products market reviews and allied questions

Description: The Timber Committee will review annually the markets in the ECE region for sawn softwood, hardwoods (including tropical), pulpwood, coniferous logs and wood-based panels (plywood, fibreboard and particle board). In addition the Secretariat will produce a bi-annual review of the forest products market in the ECE region as well as the bi-annual Timber Bulletin for Europe containing quarterly statistics relating to production, trade and prices of the main forest products in Europe and North America. Market reports will be compiled and published periodically on particular countries, commodities and market sectors. The series of studies on the utilization of forest products in different end-uses will be continued. A special lecture will be presented to each annual session of the Timber Committee. Developments in the transport, handling and standardization of forest products will be kept under review.

14.1.2 Technical and economic aspects of the wood-working industries

Description: The activities of the Committee in this field will be covered by the activities of the Provisional Group of Experts on the Wood-working Industries, including advice to the Committee on the implementation and co-ordination of its activities in the field of the wood-working industries, product development and utilization, assistance in the organization of symposia and seminars in the above fields. The Group of Experts will examine, in depth, technical and economic aspects of the wood-working industries which are referred to it by the Committee. The activities in this field are mainly carried out by means of ad hoc meetings, study tours, symposia, seminars and training courses.

14.1.3 Increased efficiency in forest operations

Description: The activities of the Committee in this field are covered by the work of the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers, which aims at increasing efficiency in forest operations by improving the methods of work through the exchange of information on the development of forest machinery, by studying the techno-economic aspects of the application of machinery and manual work, taking into account the multiple use of the forest, and by promoting vocational training of forest workers and the prevention of accidents. These activities will be carried out through study groups, symposia and training courses and with the collaboration of experts. Sessions of the Joint Committee will be held once every two years.

14.1.4 Forest and forest products statistics

Description: The activities of the Committee in this field are covered by the activities of the Joint FAO/ECE Working Party on Forest and Forest Products Statistics which deals with various statistical problems at the ECE regional level which are referred to it by the Timber Committee, the European Forestry Commission of FAO, as well as the ECE Conference of European Statisticians. These problems include statistical methodology and co-ordination, the comparability and uniformity of forestry and forest products statistics, their collection and publication, and computerization in forestry and forest industries. Sessions of the Working Party will usually be held once every two years.

Tables A and B below set out in diagrammatic form the programme of work for the Timber Committee and its subsidiary bodies for the period 1974-1979.

Annex III  
TABLE A - TIMBER COMMITTEE

Project item	Project	1974	1975	1976	1977	1978	1979
14.1.1	<u>Forest products market reviews and allied questions</u>	Annual review by the Timber Committee of the markets in the ECE region for sawn softwood, hardwoods, (including tropical), pulpwood 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 standardization of forest products. Periodic compilation and publication by the Secretariat of market reports on particular countries, commodities and market sectors.					
14.1.1 (a)	General activities						
14.1.1 (b)	Special reviews	Sawnwood and sawlogs	Pulpwood (including residues and chips), pitprops and miscellaneous roundwood	Wood-based panels (including 6th survey of the structure and raw material consumption of these industries - carried out jointly with FAO)	Sawnwood and sawlogs	Pulpwood (including residues and chips), pitprops and miscellaneous roundwood	Wood-based panels (including 7th survey of the structure and raw material consumption of these industries - carried out jointly with FAO)
14.1.1 (c)	Special studies	Review of Timber Trends and Prospects in the ECE region (jointly with FAO) Forest products in: (a) pallets (b) containers (c) other packaging (to be specified)		Utilization of forest and industrial residues and chips, small-sized wood and bark	Production and utilization of improved wood-based panels, with particular reference to the surface covering of panels		
14.1.1 (d)	Special lectures	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: structure of the forest economy, raw materials for plywood, rationalization of stockyards, combination with other materials, implication of tariff changes on European forest products sector, publicity, 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 and wood preservation.					
14.1.2	<u>Technical and economic aspects of the wood-working industries</u>	<u>Covered by the activities of the Provisional Group of Experts on the Wood-working Industries</u>					
14.1.2 (a)	Meetings	4th session 1/	Subsequent sessions to be convened on the instructions of the Timber Committee				
14.1.2 (b)	<u>Study tours in the following countries:</u>	Canada	Austria	Italy or Spain	..... 2/	..... 2/	
14.1.2 (c)	<u>Symposia training courses and seminars</u>	Symposium: Modernization of the saw-milling industry Hungary Seminar: Uses of particle board and fibreboard in construction	Norway Seminar: manufacture and utilization in construction of mass-produced forest products 3/ (jointly with ECE Committee on Housing, Building and Planning) Switzerland Seminar: Forests, wood and their role in the environment (jointly with the FAO European Forestry Commission)	..... 2/ Training course: marketing of forest products ..... 2/ Seminar: The behaviour of wood products in fire	..... 2/ Symposium: Utilization of forest and industrial residues and chips, small-sized wood and bark		

1/ The 4th session of the Provisional Group of Experts on the Wood-working industries will be held in 1974 and will consider possible follow-up activities to the study on the utilization of forest products in construction, including preparations for the proposed seminar on the behaviour of wood products in fire in 1976.

2/ Host country to be decided.

3/ Title to be modified by preparatory meeting.

Annex III  
TABLE B - SUBSIDIARY BODIES

Project item	Project	1974	1975	1976	1977	1977	1979	
14.1.3	<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						
14.1.3 (a)	General 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. 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/249)						
14.1.3 (b)	Main meetings	France 10th session of Joint Committee, including a Symposium on a subject of interest to the host country	2nd symposium on ergonomics applied to forestry	Finland 11th session of the Joint Committee, including a symposium on a subject of interest to the host country	Symposium on multi-purpose logging machines	..... 1/ 12th session of the Joint Committee		
14.1.3 (c)	Meetings of study groups	Mechanization of forest work (6th session) Vocational training and prevention of accidents in forest work (10th session)	Methods and organization of forest work (8th session) Vocational training and prevention of accidents in forest work (11th session)	Mechanization of forest work (7th session)	Methods and organization of forest work (9th session) Vocational training and prevention of accidents in forest work (12th session)	Mechanization forest work (8th session)		
14.1.3 (d)	International training courses and/or seminars	Pedagogic and organizational problems of forest worker training	Use and operation of skidders					
14.1.4	<u>Forest and forest products statistics</u>	Covered by the activities of 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						
	General activities	Problems under consideration: statistical methodology and co-ordination, matters concerning the comparability and uniformity of forest products statistics, their collection and publication, as well as special projects referred to it by the parent bodies						
14.1.4 (a)	Sessions of the Working Party		10th session		11th session		12th session	
14.1.4 (b)	Special studies and projects							
	Environmental benefits of the forest (in co-operation with IUFRO)	<u>Ad hoc meeting</u> Direction of further work to be decided on the basis of the recommendations of the meeting of experts						
	Classification and definitions of forest products	To be revised and harmonized with SITC, Rev. 2 and BTN						
	Conversion factors for forest products	Publication of revised study	Conversion factors to be kept under review					
	International comparability of removal statistics		<u>Ad hoc meeting</u> on removals statistics, their standardization and improvement					
	FAO Forest Inventory (ECE region)	Publication of 1968 data Collection of new data in connection with Timber Trends and Prospects Study	Review by 10th session					
	Ten-year series of forest and forest products statistics (in connection with Timber Trends and Prospects Study)	Preparation and checking of data with countries	Publication of 10-year series					
	Electronic data processing (EDP) in forestry and the forest industries		Seminar on the improvement of data capture methodology in forestry (in co-operation with IUFRO)				Seminar on specific uses of EDP (scope to be decided) (in co-operation with IUFRO)	
	Cost and price statistics	<u>Ad hoc meeting</u>	Collection and publication in the Timber Bulletin for Europe of statistics, according to the recommendation of the <u>ad hoc meeting</u>					
	Other projects	Enquiry into labour statistics, forest fire statistics, statistics on consumption, deliveries and end uses						

1/ Host country to be decided.