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TIMBER COMMITTEE

REPORT OF THE THIRTY-SECOND SESSION

held at Geneva from 14 to 18 October 1974

As approved by the Committee

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Introduction

1. The Timber Committee held its thirty-second session at Geneva from 14 to 18 October 1974. 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; Hungary; Ireland; Italy; Netherlands; Norway; Poland; Romania; Spain; Sweden; Switzerland; Ukrainian SSR; USSR; United Kingdom; United States of America; Yugoslavia. Brazil and Japan participated under Article 11 of the Commission's terms of reference. The International Labour Organisation (ILO) and the Food and Agriculture Organization of the United Nations (FAO) also sent representatives. 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 Nordic Fibreboard Federation (NFC) and the Organization of European Sawmilling Industries (OES) were also represented. Staff officials of the Commission of European Communities and of the Organization for Economic Co-operation and Development (OECD) attended at the invitation of the Secretariat. 1/

2. The Chairman of the Timber Committee, Mr. A. Madas (Hungary) opened the session and welcomed delegates.

3. The Committee honoured the memory of Mr. P. Rodary, for many years a delegate of France to the Committee.

Adoption of the Agenda (Item 1 of the Agenda)

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

Election of officers (Item 2 of the Agenda)

5. The Committee re-elected Mr. A. Madas (Hungary) Chairman, and Mr. J. Bakker (Netherlands) and Mr. F. Palmer (United Kingdom), Vice-Chairmen.

Matters arising out of the twenty-ninth session of the Commission (Item 3 of the Agenda)

6. The Committee was informed of the Commission's discussion of its work and took note of the resolutions and decisions of the Commission, on the basis of document TIM/R.14.

7. The Committee noted that it should bear in mind during its session Commission resolution 1 (XXIX) - The future activities of the Commission, resolution 2 (XXIX) - Work of the Commission as a whole, resolution 3 (XXIX) - Programme of work of the Commission for 1974/75 and its long-term programme of work for 1975-1979, decision D (XXIX) - Industrial co-operation, decision E (XXIX) - Energy problems in Europe and decision F (XXIX) - Standardization, especially when considering its programme of work.

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

Meeting of the Committee's office-holders (Item 4 of the Agenda)

8. The Committee was informed of the twelfth meeting of its office-holders, on the basis of document TIM/R.15. They had met at Geneva on 28 and 29 March 1974 to review the Committee's programme of work, and had held a joint session with the Executive Committee of the FAO European Forestry Commission, to consider subjects of interest to both bodies. The Committee agreed not to discuss the office-holders' recommendations as a whole, but to take them into account under the different sections of item 10 of the Agenda, concerning the Committee's programme of work and priorities.

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

9. The representative of FAO expressed the wishes of its newly appointed Assistant Director-General in charge of the Forestry Department, Mr. Kenneth King, for a successful meeting. He briefly reviewed the work of the Committee on Forestry, the Committee for Forest Development in the Tropics and the Advisory Committee of Experts on Pulp and Paper at their sessions in 1974 and drew attention to the forthcoming World Consultation on Wood-based Panels, to be held at New Delhi from 6 to 16 February 1975, as well as the Technical Conference on Tropical Moist Forests, to be held in Brazil from 22 September to 3 October 1975. Attention was drawn to the newly published Yearbook of Forest Products, 1972, the first computerized version of this publication, which contains a twelve year series of production and trade for all forest products and all countries. The Committee was also informed of the discussions of the FAO European Regional Conference.

10. The representative of the Organization for Economic Co-operation and Development (OECD) informed the Committee of a study being undertaken by OECD on the use of waste paper and non-wood fibres for pulp and of a new OECD quarterly statistical publication covering production, trade and stocks of pulp and paper.

Market review and prospects (Item 6 of the Agenda)

11. 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, which supplemented countries' written market statements. It took note during its discussions of the Annual Forest Products Market Review published by the Secretariat and the brief comments on recent developments in the market submitted by the Secretariat in TIM/CRP.9. It drew up tables of countries' estimates for 1974 and 1975 of domestic requirements, production, imports and exports of the products under consideration. A summary table is given in Annex I.

12. The statements of the delegations highlighted the marked change in the economic climate in which the European forest products markets were now operating compared with that which still prevailed at the Timber Committee session in October 1973. Although at that session it had been expected that the then tight supply of most forest products would ease considerably during 1974, the sudden worsening of the over-all economic situation during the winter of 1973/74, especially following the oil supply crisis, had not been foreseen. As a result, the forest products markets, with the two important exceptions of the pulpwood and the pulp and paper sectors, have been faced during 1974 with a check on the growth of demand or, in the case of the major consumer industry, dwelling construction, with a decline in demand. At the same time, stocks

which had already begun to grow in most importing countries in the latter part of 1973, have risen this year in nearly all European countries. In some cases they have increased to exceptionally high levels and, due to high interest rates, severe restrictions on credit and even physical shortages of storage space, have become an increasingly heavy burden on producers and consumers, as well as on importers.

13. The Committee stressed the unusual difficulties in forecasting the course of the over-all European economy over the coming year, and hence of predicting levels of requirements, production and trade of forest products in 1975. It accepted the following however as a reasonably plausible scenario on which to base its general expectations for the market: moves by countries to reflate their economies, notably the construction sector; some easing in restrictive credit policies and interest rates; and possibly some slackening in the rate of inflation. Under such conditions, the trough of the market cycle would probably be reached for sawnwood and woodbased panels during the course of 1975 with prospects of an upturn before the end of that year. Changes in economic activity and the forest products markets in North America and Japan are expected to follow a similar course.

14. With regard to sawn softwood, exceptional increases in demand in Europe led to record levels of production and trade in 1973. The downturn in demand in the current year and the rapid build-up of stocks at all points of the chain of supply is resulting in a fall in imports in the second half of 1974 which is the steepest for very many years.

15. The Committee expected a smaller decline in domestic requirements of sawn softwood in 1975 after the sharp drop in the current year. The continued fall in imports in 1975 would have the effect of correcting the present heavily overstocked position in most importing countries during the year and the steps taken by major producing countries to curtail output and exports should help towards achieving a more balanced market.

16. The debate was characterized by the general feeling that the restoration of a healthy market for sawn softwood in 1975 was being greatly helped by the continuation of exporters' policy of not putting pressure on the market until such time as the importers were able to reduce their stock levels and to return to the market for fresh supplies. The very serious strains which this would place upon producers who had their own stock-holding, financing and other problems was, however, recognized. The Committee underlined the overriding need for co-operation between importing and exporting countries in the interests of ensuring adequate availability when market conditions improve.

17. Looking to the longer term, the Committee felt that, whatever the trend of the over-all economy, the forest industries, because of such advantages as low energy consumption and the greater acceptability of their products from the environmental point of view than some major competing materials, would be relatively favourably placed. The present setback in demand, although serious, should therefore be seen as only a temporary disturbance in what is confidently expected by the Committee to be a long-term positive trend.

Medium-term survey of trends in the sawnwood and sawlog sector (Item 6 C of the Agenda)

18. The Secretariat presented a draft of the medium-term survey of trends in the sawnwood and sawlog sector (TIM/CRP.7). The survey traces developments in these markets up to and including 1973 and compares them with forecasts made in earlier studies, of trends to 1975. On this occasion, countries had not been asked to provide medium-term forecasts or other information for the survey. The Committee agreed that the survey should be published, after revision, as a supplement to the Timber Bulletin for Europe.

Utilization sector study: Packaging (Item 7 of the Agenda)

19. The Committee expressed its satisfaction with the first results of the study on the use of forest products in packaging and its conclusions concerning this utilization sector (TIM/R.18). The Committee noted the difficulties which were inherent in this study, resulting from the difficulty of collection and the lack of comparability of heterogeneous data. It stressed the great importance of this sector as a market for forest products, which was apparent from the study. The study describes interesting prospects for the use of forest products in packaging as against others in the present economic situation, as well as the economic and environmental advantages of a material which can be recycled. Attention was drawn to the importance of this utilization sector as an outlet for the products of lower quality roundwood.

20. As the sector study on the use of forest products in packaging was intended to serve as a reference for the forthcoming study of timber trends and prospects in the ECE region, the Committee requested countries to send to the Secretariat any comments or supplementary data before 31 December 1974, as well as any study or new information concerning this sector.

Special lecture (Item 8 of the Agenda)

21. The Committee was informed that it had not been possible to find a speaker to deliver a special lecture on either of the subjects proposed by the office-holders, one of which concerned long-term price variations for raw materials. However, Austria was undertaking a pilot study on costs and prices of forest products. Arrangements were also being made for similar studies by Norway, in co-operation with Finland and Sweden, and possibly by a number of other countries. These projects were intended, amongst other things, to provide information for the new timber trends study and to help the Joint FAO/ECE Working Party on Forest and Forest Products Statistics in its work on improving the coverage and international comparability of price statistics.

Activities of other Principal Subsidiary Bodies of ECE dealing with problems of concern to the Committee (Item 9 of the Agenda)

22. In accordance with Commission resolution 2(XXIX) and on the basis of document TIM/R.17, the Committee was informed of the activities of other Principal Subsidiary Bodies of ECE dealing with problems of concern to it, notably by a synoptic presentation of their programme of work. The Committee took note of the document and agreed to take the information presented into account when discussing its programme of work.

Programme of work and priorities for 1974/75 and long-term programme of work and priorities for 1976-1980 (Item 10 of the Agenda)

(i) Activities and programme of work of joint subsidiary bodies

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

23. The Committee was informed that the tenth session of the Joint Committee, due to be held in 1974, would take place in Paris after the thirty-second session of the Timber Committee, in conjunction with a study tour and a Joint Committee International Union of Forestry Research Organizations (IUFRO) symposium on stand establishment. On this occasion the Joint Committee will establish its long-term programme for the next five years and celebrate the twentieth anniversary of its foundation.

24. The Committee was also informed of the sixth session of the Study Group on Mechanization of Forest Work, in January 1974, and the tenth session of the Study Group on Vocational Training and Prevention of Accidents in Forest Work, at the end of April 1974.

25. The Committee noted that, thanks to the active co-operation of a number of countries, the Secretariat had been able to organize the following meetings over the last year:

- Seminar on ergonomics applied to forest work, held in the Federal Republic of Germany and the Netherlands in October 1973
- Meeting of experts on ergonomics applied to power chain saws in forestry work, held in Umeå (Sweden) in December 1973
- Seminar on pedagogic and organizational problems of forest worker training, held in Zollikofen (Switzerland) in April 1974.

26. The Committee noted further that two ad hoc groups of experts have been established to advance part of the very specialized activities of the Study Group on Vocational Training and the Prevention of Accidents in Forest Work, namely:

- ad hoc chain saw group, and
- ad hoc group on forest accident statistics.

27. The Committee was reminded that at the kind invitation of the Government of Sweden, the Joint Committee will organize a Symposium on multi-purpose logging machines, tentatively scheduled for 10 to 18 June 1975 and that the Finnish Government has invited the Joint Committee to hold its eleventh session in that country in 1976.

28. Appreciation was expressed for the work carried out by the Joint Committee in the various fields of its activity.

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

29. Since the thirty-first session of the Timber Committee there has been no meeting of the Working Party. There have, however, been two meetings of experts.

30. Mr. S. Pringle (FAO) reported on the ad hoc meeting of experts on forest resource appraisal and wood supply forecasting methodology held under his chairmanship at Geneva on 28 to 30 November 1973 (report: TIM/EFC/WP.2/AC.2/2).

31. Appraisal of resources was seen as an essential basis for the new timber trends study. It was recommended that because of their importance for European supplies, North America and the USSR be included in the appraisal for this study. In preparing forecasts of supply the meeting concluded that the aim should be to analyse the implications of strategic and policy options for future supply alternatives rather than to prepare point estimates. Account should also be taken of activities in other sectors affecting supply potential.

32. It was recommended that correspondents should be nominated by each country, an arrangement that has since been put into effect.

33. Mr. E. Clicheroux (Belgium), Chairman of the Working Party, reported on the ad hoc meeting of experts on environmental benefits of forestry held under the chairmanship of Mr. A.J. Grayson (United Kingdom) at Geneva from 1 to 5 April 1974 (report: TIM/EFC/WP.2/AC.3/2).

34. In a number of countries attempts have been made to enumerate these benefits and to measure and evaluate them. The meeting recommended that member countries be asked about the measurements that they consider desirable, practicable and which they currently use in the field of environmental benefits, this information to be made available for the Interlaken symposium.^{1/} The Committee supported the conclusion that the role of the forest for the environment was not incompatible with its role in the production of timber.

35. The Committee agreed to the proposal that the title of the Working Party be changed to "Joint FAO/ECE Working Party on Forest Economics and Statistics". The Secretariat was instructed to inform the European Forestry Commission of its agreement to this proposal well in advance of the joint session of the Committee and the European Forestry Commission in October 1975.

36. At its tenth session the Working Party should reconsider its terms of reference and report back with a recommendation on revised terms of reference to the joint session of the European Forestry Commission and the Timber Committee in October 1975.

37. FAO has included a twelve year series of statistics on production and trade in forest products in the 1972 Yearbook of Forest Products which had just been published, thus meeting the Committee's earlier request for a new ten year series.

38. The Committee supported the Secretariat's suggestion that the continuing work of the Working Party on wood removals, comparability and consistency of series on removals, consumption and production and on conversion factors should be the main subject of its coming session.

^{1/} See paras. 60-63

39. The Committee noted that the Classification and Definitions of Forest Products, an advance version of which had been published as Supplement 6 to Volume XXV of the Timber Bulletin for Europe, had been well received and was being further refined, notably in the pulp and paper and wood-based panels areas.

(ii) Activities and programme of work of the Timber Committee

(a) Ad hoc meeting on grading rules for coniferous sawnwood

40. Mr. W. Townsley (Canada), Chairman of the ad hoc meeting on grading rules for coniferous sawnwood, presented his report on the meeting (TIM/WP.3/AC.3/4) to the Committee which accepted the meeting's proposal for an international standard for the stress grading of coniferous sawnwood. The Committee agreed that research work on the points mentioned in the report and experience in practice were necessary before any standard could be definitely approved. It therefore decided that the standard should be put into operation but be reconsidered within a period of 1-1½ years, when the ad hoc meeting should be reconvened to review developments and suggest changes where appropriate. The Committee agreed that the standard, as proposed, be published as a supplement to the Timber Bulletin for Europe and asked the Secretariat to encourage its wide distribution. The Committee welcomed the very successful co-operation with the International Organization for Standardization (ISO) and the European Softwood Conference on this project.

(b) Symposium on the modernization of the sawmilling industry

41. The Committee was informed of preparations for this symposium on the basis of its Provisional Agenda (TIM/SEM.3/1). The symposium will take place from 13 to 17 January 1975 at Geneva. The Committee was also informed of the arrangements made for a visit to a sawmill and the national timber school in Switzerland, and thanked the Swiss Government for its kind invitation. The Committee underlined the importance which it attached to the symposium, which was to deal with matters upon which depended the successful long-term development of the industry.

(c) Seminar on industrial production and use of wood-based products in the building industry

42. The Committee was informed of the preparations for this seminar, which will be held in Sandefjord (Norway) from 2 to 7 Jun. 1975. A preparatory meeting held in February 1974 had defined the details of its programme and organization (report: TIM/SEM.1/AC/2). The Committee also heard a statement from the Norwegian delegation on the arrangements being made by the host country for the study tour which will follow the seminar (7 to 13 June). The Committee considered that the joint organization of the seminar with the ECE Committee on Housing, Building and Planning, offered a valuable opportunity for the wood products industries on the one hand and the building sector on the other to examine together and in depth the contribution which wood products could make towards the industrialization of the building process, and for this reason the seminar deserved to be widely publicized.

43. The Committee noted that the basic documentation of introductory reports prepared by rapporteurs on the main topics of the seminar would be circulated early in 1975, and that countries would be invited to arrange for the preparation of response papers by experts in their countries on specific aspects discussed by the seminar.

(d) Transport and handling of forest products

44. Mr. F. Palmer (United Kingdom), co-ordinator of the Committee's activities in the field of transport and handling, presented a report on recent developments. Virtually all sawn softwood exports from the Nordic countries and 70 per cent of USSR exports were now packaged. Forest products had attracted some eighty liner services running regularly between Nordic ports and the British Isles. High value decorative plywoods are being increasingly shipped in containers, which Mr. Palmer considered would be used more and more for the movement of joinery components.

45. Unitization of softwood deliveries could contribute greatly to the long-term reduction of stock-holding costs in both exporting and importing countries and, with greater use of kilns, reduce the time taken for timber to move from forest to consumer.

46. The Committee agreed with the view that any measures, such as more efficient and speedier handling, to smooth the fluctuations in the sawn softwood trade, especially those of producers and consumers stocks, would be highly beneficial to the trade and its customers. It also supported the suggestion that information on new sawmilling capacity would assist the Committee in its efforts to promote the sound development of the market. Accordingly, delegations were invited to brief participants to the forthcoming symposium on the modernization of the sawmilling industry about the availability of such information in their respective countries so that this suggestion could be considered further at the symposium; and to include information on new capacity in their written market statements to the annual Committee session.

47. The Committee expressed its warm appreciation to Mr. Palmer for his valuable contribution to its work in the field of transport and handling.

(e) Timber trends and prospects study

48. The Committee was informed of the progress of the Secretariat's work on a new study of trends and prospects of the timber market in Europe. It emphasized its great interest in that study, while recognizing the particular difficulties of long-term forecasting at the present time.

49. The Committee noted the difficulties encountered by the Secretariat in the preparation of the study, because financial resources had recently been curtailed by factors beyond the Committee's control but affecting the execution of its programme of work. In that connexion the Committee regretted that the resources at present available for the Secretariat would not make it possible for the study to cover as much ground as had previously been intended.

50. The Committee considered that in the present general situation the new study, while bringing the series of data already available up to date, should particularly emphasize the evaluation of resources and the supply of timber and should base its projections for the future on a number of alternatives and their implications, having regard to the need to allow for an increased degree of uncertainty in planning: the study, rather than attempt to forecast the future, would therefore have to consider the possible effects of various growth alternatives.

51. In order to facilitate the Secretariat's work, the Committee requested countries to send their correspondent to Geneva for one or two days, so that national data could be collected and interpreted through direct contacts.

52. The Committee agreed that the Secretariat should submit a draft of the study to the joint session of the Committee and the FAO European Forestry Commission. This draft would describe the progress made by autumn 1975 and enable the Committee and the Commission to take note of the first conclusions, which result from it. This text would also be submitted for discussion at the symposium on "Forests and Wood: their Role in the Environment" and would provide an opportunity for the symposium to state its views on the constraints, if any, governing the production of timber.

53. The Committee was informed of the financial implications, i.e. US \$49,205, of the translation, reproduction and publication of such a study and decided, in view of the great interest which it attached to the work, strongly to recommend its publication as soon as the text was completed in 1976.

(f) Study tours and seminars

Study tour in Canada

54. The study tour in Canada took place from 25 May to 8 June 1974. Over 120 participants had visited forest operations, wood-processing and wood-distribution operations and seen many different utilizations for forest products in the provinces of Quebec, Ontario and British Columbia.

55. The Committee expressed its deep gratitude to the Government of Canada for the excellent organization of the study tour and for the generous hospitality extended.

Seminar on the utilization of particle board and fibreboard in construction, in Hungary

56. The Committee was also informed, on the basis of document TIM/CRP.8, and a statement by Mr. H. Blétry (France) of the seminar on the utilization of particle board and fibreboard in construction, which had taken place in Sopron (Hungary) from 2 to 6 September 1974, preceded by a study tour in Hungary. The seminar had been organized with the very active co-operation of the European Federation of Fibreboard Manufacturers (FEROPA), the European Federation of Associations of Particle Board Manufacturers (FESYP) and the Nordic Fibreboard Federation (NFC), and the Committee thanked them for their generous help.

57. During the valuable exchange of information which had taken place, many participants had felt the need for international action in this sector, particularly regarding research into the behaviour of these panels in fire and the harmonization of national fire regulations. The Committee therefore agreed to convene a session of the Provisional Group of Experts on the Wood-working Industries, if possible in 1975. The meeting would have two objectives:

- (a) to prepare the seminar on the behaviour of wood products in fire, and
- (b) to recommend follow-up action to the seminar held in Sopron and to the appreciation course on plywood and blockboard held in London in 1972.

58. The Committee thanked the Government of Hungary for its generosity and efficient organization, when acting as host to the seminar and the study tour.

Study tour in Austria

59. The delegate of Austria described preliminary arrangements for the study tour in his country, which is scheduled for 8 to 12 September 1975. The aim of the study tour was to show a cross-section of Austria's forestry and timber industry. Participation would be limited to sixty, and the cost would be kept as low as possible, probably under \$180 per participant.

(g) Symposium "Forests and wood: their role in the environment"

60. The Committee considered the Secretariat's proposals (TIM/R.19/Add.1) for the objectives, programme and title of the symposium on "Forests and wood: their role in the environment", which is scheduled to be held in Interlaken from 22 to 26 September 1975 at the invitation of the Government of Switzerland.

61. The Committee approved the objectives of the symposium, as proposed, and agreed that the title should be "Forests and wood: their role in the environment". With regard to the scope of the symposium, it considered that the comprehensive list of subjects set out in the tentative outline would need to be reduced in the final programme to a limited number of key questions. It agreed that a restricted number of basic papers, prepared by highly qualified experts, should provide background for Part A of the symposium - Underlying factors, philosophies and assumptions, but that supplementary papers dealing with specific aspects covered in the outline could also be tabled. It approved the suggestion that background documentation for Part B - Policy considerations - should be prepared by or under the supervision of a steering group which should include the Committee's own chairman and that of the FAO European Forestry Commission, the co-sponsor of the symposium.

62. The Committee requested the Secretariat to set in train at once the selection of suitable authors for the key papers, and noted with pleasure the offers of several delegations to provide the services of suitable experts. It supported the suggestion that some degree of balance between the points of view of the forestry and wood sector and the broader environmental perspective was highly desirable, not only in the background papers but also by including in countries' delegations experts in the environmental field from outside the forestry and wood sector.

63. The Committee was informed that participation would be limited to two hundred at the symposium, during the course of which a one-day study tour would be organized to forests and wood industries of environmental interest. The Committee thanked the Government of Switzerland for its kind invitation.

(iii) Adoption of the programme of work of the Committee

(a) Long-term programme of work and priorities for 1976-1980

64. The Committee considered its long-term programme on the basis of the Secretariat Note TIM/R.19, which included a draft programme. During the discussion, the Committee took into account Commission resolutions 2 (XXIX) - Work of the Commission as a whole and 3 (XXIX) - Programme of work of the Commission for 1974/75 and its long-term programme of work for 1975-1979.

65. Mr. H. Blétry (France), Chairman of the ad hoc meeting to consider and make recommendations on the future structure and conduct of the Timber Committee's programme of work, which had taken place in March 1974, presented the results of the meeting to the Committee. The meeting had reviewed the coverage of the forest industries sector by international bodies and made detailed proposals for amendments or additions to the Committee's programme of work (report: TIM/AC.2/2). The meeting's recommendations had been discussed by the Committee's office-holders. The Committee approved the proposals of the meeting and agreed that it would be useful to organize at intervals more meetings of a similar kind, since it was of the greatest importance that its programme of work and priorities should be examined in depth, and revised if necessary, from time to time.

66. The following subjects were proposed for special lectures: timber accounting and selection of wood raw material during logging and primary conversion, and the optimization of the structures of forest enterprises. It was also suggested that the Committee undertake studies on ergonomics in forest work and on normative documents on the application of ergonomics and standards for machinery design from the ergonomic point of view: these subjects were entrusted to the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers, which will consider its own long-term programme at its tenth session.

67. Because of the growing content of its work dealing with equipment and technology in the wood-processing industries, the Committee recognized the need for a highly qualified officer in this field in its secretariat and expressed the wish that such a post be established.

68. On the basis of a suggestion of the ad hoc meeting on grading rules for coniferous sawnwood (TIM/WP.3/AC.3/4, para. 14), the Committee recommended that action be undertaken on the preparation of an international standard for structural finger-jointed coniferous sawnwood. This action should be started by the presentation of work already completed, notably in Canada, Finland and the United States, to be circulated to the drafting group which had taken part in the previous standardization project. The group should meet briefly during 1975 to draw up proposals for appropriate action.

69. The Committee requested the Joint FAO/ECE Working Party on Forest and Forest Products Statistics to consider whether the question of data capture methodology was of sufficient importance at the present time to merit the holding of the proposed seminar on the subject in 1978.

70. It was pointed out that the development of trade was one of the ECE's four priority areas and that much could be done to improve the structure of East-West trade in the forest products sector, notably by increasing the proportion of further processed wood products. The Committee asked its office-holders to consider the question and to propose what action should be undertaken.

71. The Committee noted that the Secretariat was obtaining the collaboration of a number of countries on studies of costs and prices for forest products (see para. 21) and, in the light of this work, asked it to define the scope of the ad hoc meeting on cost and price statistics.

72. The Committee stressed the vital importance for the efficiency and success of its work of documents being distributed to member countries well before the meetings to which they referred. It recognized the difficulties encountered by the Secretariat but urged it to make every effort to issue documents well in advance of the relevant meetings.

73. The Committee was informed of a proposal to organize an ECE symposium in late 1976 or early 1977 on the effects of pollution on vegetation. It would be held under the joint auspices of the Timber Committee and the Committee on Agricultural Problems, in close co-operation with FAO, and with the support and assistance of the Senior Advisers to ECE Governments on Environmental Problems and of the United Nations Environment Programme (UNEP). The Committee expressed interest in this proposal and agreed in principle to include it in its programme of work, subject to an equally favourable response from the other bodies involved.

74. The Committee approved its long-term programme of work and priorities for 1976-1980, as set out in the draft programme (TIM/R.19) and modified in accordance with its discussion. The programme as approved is set out in Annex III.

(b) Programme of work and priorities for 1974/75

75. The Committee recognized that because of two major projects, the new study of timber trends and prospects and the symposium on "Forests and wood: their role in the environment", Secretariat resources would be strained during 1975. It agreed therefore that no separate medium-term survey of the markets for pulpwood, pitprops and miscellaneous roundwood be undertaken in 1975, although a section of the annual forest products market review could probably be expanded slightly to compensate partly for this, and that the study on the utilization of forest and industrial residues and chips, small-sized wood and bark be postponed to not later than late 1975/early 1976, so that it could still serve as a background document to the symposium to be held on the same subject in Romania in the second half of 1976.

76. The Committee approved its amended programme of work for 1974/75, as set out in Annex II.

Any other business (Item 11 of the agenda)

77. The Committee was informed by the delegate of Brazil of plans for the Technical Conference on Tropical Moist Forests, scheduled to be held in collaboration with FAO and at the invitation of the Government of Brazil in September/October 1975. Major problems of bringing heterogeneous tropical forests into productive use while creating the minimum of environmental disturbance would be discussed by participants, who would also have the opportunity to visit forests of the Amazon Basin, the largest and virtually the last of the untapped hardwood forest reserves in the world.

78. The delegation of the German Democratic Republic outlined to the Committee the main characteristics of the forest and timber economy of that country. The delegation described the forest resource and the exploitation methods used as well as the measures taken in many branches of the wood-working industry for the maximum utilization of wood as a raw material. The Committee expressed its thanks to the delegation for its presentation.

79. The Committee recognized that many of the results of its work, intended for wide distribution, did not reach all those to whom they were addressed, thus inevitably reducing their effectiveness. It urged all delegates to ensure that the Committee's documentation was given the widest possible dissemination and that the Committee's publications were well known in their countries. It also requested the Secretariat to consider possible improvements to its methods of disseminating information on the Committee's activities and suggested that its office-holders might usefully explore this matter further.

Adoption of the report of the Committee's session (Item 12 of the Agenda)

80. The draft report, presented by the Secretariat, was adopted, with some modifications which have been incorporated into the present document.

Date of next session

81. The Committee agreed that its next session, part of which will be held jointly with the FAO European Forestry Commission, should take place from 20 to 24 October 1975, subject to the availability of conference services.

Annex I

Summary table of forecasts made in October 1974 for 1974 and 1975

Note: The Committee "stressed the unusual difficulties in forecasting the course of the overall European economy over the coming year, and hence of predicting levels of requirements, production and trade of forest products in 1975 (para. 13)". This should be borne in mind when analysing the data presented below.

Europe (excl. USSR)	Million units	Domestic requirements			Production			Imports			Exports		
		1973 (actual)	1974 (estimates)	1975	1973 (actual)	1974 (estimates)	1975	1973 (actual)	1974 (estimates)	1975	1973 (actual)	1974 (estimates)	1975
Sawn softwood	m3(s)	78.69	73.42	72.12	70.84	69.45	65.85	30.97	27.20	22.63	31.38 ^{a/}	27.86 ^{a/}	26.60 ^{a/}
Sawn hardwood	"	21.87	20.97	21.07	19.50	19.49	19.45	5.68	4.46	4.26	3.22	2.85	2.72
-Temperate zone	"	2.86	2.36	2.23	3.03	2.68	2.56
-Tropical	"	2.82	2.10	2.03	0.19	0.17	0.16
Hardwood logs	m3(r)	11.89	10.34	9.86	2.10	2.17	1.98
-Temperate zone	"	2.77	2.46	2.38	1.94	2.05	1.86
-Tropical	"	9.12	7.88	7.48	0.16	0.12	0.12
Plywood	m3	5.98	5.55	5.54	4.62	4.35	4.42	2.93	2.35	2.31	1.42	1.22	1.31
Particle board	"	19.48	20.18	20.94	19.37	20.84	21.71	3.83	3.49	3.30	3.65	4.07	4.06
Fibreboard	m.t.	3.50	3.54	3.71	3.50	3.57	3.74	1.14	1.10	1.12	1.13	1.13	1.15
-Hardboard	"	3.08	3.18	3.33	3.07	3.18	3.32	0.96	0.96	0.96	0.95	0.95	0.96
-Insulating board	"	0.42	0.36	0.38	0.43	0.39	0.42	0.18	0.14	0.16	0.18	0.13	0.19
Pulpwood	m3(r)	149.38	158.41	165.05	135.42	149.49	156.11	16.77	19.41	18.17	10.53	9.70	8.20
-Round & split	"	109.12	115.73	..	96.62	108.20	..	13.50	15.83	..	8.50	7.73	..
-Residues, chips and particles	"	40.26	42.68	..	38.80	41.29	..	3.27	3.58	..	2.02	1.97	..
Coniferous logs	"	5.44	5.66	4.80	2.53	2.68	1.68

^{a/} Including USSR exports.

Annex II

PROGRAMME OF WORK AND PRIORITIES FOR 1974/75

The programme of work and priorities for 1974/75, set out below, covers the period between the Committee's thirty-second and thirty-third 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 1974/75. (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 thirty-third session in 1975 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 1974 to March 1975.

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

(d) The Secretariat, jointly with FAO, will prepare the third study of timber trends and prospects in the ECE region, which will be considered by a joint session of the Timber Committee and the FAO European Forestry Commission.

(e) A symposium will be held, jointly with the FAO European Forestry Commission on "Forests and wood: their role in the environment".

The Committee will review at its thirty-third session developments in the

(f) transport and handling and

(g) standardization of forest products.

(h) A special lecture on a problem of interest to the Committee will be delivered at its thirty-third 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, whose sessions will be convened on the instructions of the Timber Committee.

(a) The fifth session of the Provisional Group of Experts will start preparations for the seminar on the behaviour of wood products in fire and consider what follow-up action should be undertaken to the appreciation course on plywood and blockboard (London, 1972) and the seminar on the utilization of particle board and fibreboard in construction (Sopron, 1974).

(b) Work will continue on revising and implementing the international standard for the stress-grading of coniferous sawnwood, according to the instructions given by the thirty-second session of the Committee.

(c) Work will start on the preparation of an international standard for structural finger-jointed coniferous sawnwood

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

(e) A seminar will be held in Norway, jointly with the ECE Committee on Housing, Building and Planning, on industrial production and use of wood-based products in the building industry.

(f) A study tour will be held in Austria.

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 tenth session in France, preceded by a symposium on stand establishment (jointly with IUFRO)

(b) The Study Group on Methods and Organization of Forest Work will hold its eighth session.

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

(d) A training seminar will be held on the use and operation of skidders.

(e) A symposium will be held on multi-purpose logging machines.

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 and the FAO European Forestry Commission, as well as the Conference of European Statisticians.

(a) The Working Party will hold its tenth session, which will cover several substantive items and draw up a programme of work (Priority A).

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

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

- (c) Removal statistics (Priority A)
- (d) Classification and definitions of forest products (Priority A).
- (e) Conversion factors for forest products (Priority A).
- (f) Forest inventory for the ECE region (Priority A).

Annex III

LONG-TERM PROGRAMME OF WORK AND PRIORITIES 1976-1980

Introductory note

Below are listed the projects, primarily the responsibility of the ECE Timber Committee, to be undertaken during the period 1976 to 1980 included in the long-term programme of work and priorities. The work programme of 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 reviews 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. The Committee will keep under review long-term developments in the timber sector and publish periodic studies on this subject. The Committee will also hold symposia on subjects of importance to the timber sector.

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 and seminars.

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 by 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 and 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.

Annex III

TABLE A - TIMBER COMMITTEE PROGRAMME OF WORK

Project item	Project	1975	1976	1977	1978	1979	1980
14.1.1	<u>Forest products market reviews and allied questions</u>	Review by the Timber Committee at its annual sessions of the markets in the ECE region for sawn softwood, hardwoods, (including tropical), pulpwood and coniferous logs, plywood, fibreboard and particle board. Annual reviews of the forest products market by the Secretariat, (with supplementary publications) 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	General activities						
14.1.1	Special reviews		Wood-based panels (including sixth 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 seventh survey of the structure and raw material consumption of these industries - carried out jointly with FAO)	Sawnwood and sawlogs
14.1.1	Special studies	Review of timber trends and prospects in the ECE region (jointly with FAO)	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	Symposium	Switzerland Forests and wood: their role in the environment (jointly with the FAO European Forestry Commission)					
14.1.1	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, wood preservation, timber accounting and selection of wood raw material during logging and primary conversion and optimization of the structures of forest enterprises.					
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	Meetings	Fifth session 2/	Sessions to be convened on the instructions of the Timber Committee				
14.1.2	Study tours in the following countries:	Austria	Italy or Spain 1/ 1/		
14.1.2	Symposia, training courses and seminars	Symposium: Modernization of the sawmilling industry Norway Seminar: Industrial production and use of wood-based products in the building industry (jointly with ECE Committee on Housing, Building and Planning)	Romania Symposium: Utilization of forest and industrial residues and chips, small-sized wood and bark 1/ Seminar: Transport and handling of forest products 1/ Training course: Distribution and marketing of forest products 1/ Seminar: The behaviour of wood products in fire 1/ Seminar: Utilization of tropical hardwoods		

1/ Host country to be decided.

2/ The fifth session will start preparations for the seminar on the behaviour of wood products in fire and consider what follow-up action should be undertaken to the appreciation course on plywood and blockboard (London 1972) and the seminar on the utilization of particle board and fibreboard in construction (Sopron 1974).

Annex III

TABLE B - SUBSIDIARY BODIES OF THE COMMITTEE: PROGRAMME OF WORK

Project item	Project	1975	1976	1977	1978	1979	1980
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	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	Main meetings	Sweden Symposium on multi-purpose logging machines	Finland Eleventh session of the Joint Committee, including a symposium on a subject of interest to the host country	Second symposium on ergonomics applied to forestry 1/ Twelfth session of the Joint Committee		
14.1.3	Meetings of study groups	Methods and organization of forest work (eighth session) Vocational training and prevention of accidents in forest work (eleventh session)	Mechanization of forest work (seventh session)	Methods and organization of forest work (ninth session) Vocational training and prevention of accidents in forest work (twelfth session)	Mechanization of forest work (eighth session)	Methods and organization of forest work (tenth session) Vocational training and prevention of accidents in forest work (twelfth session)	Mechanization of forest work (ninth session)
14.1.3	International training courses and/or seminars	Use and operation of skidders	Pedagogic and organizational problems of forest worker training	Use of cableways			
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 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	Sessions of the Working Party	Tenth session		Eleventh session		Twelfth session	
14.1.4	Special studies and projects	To be revised and harmonized with SITC, Rev. 2 and BTN					
	Classification and definitions of Forest products	Conversion factors to be kept under review					
	Conversion factors for forest products	Review by tenth session					
	International comparability of removal statistics	Review by tenth session					
	Forest inventory (ECE region)	Review by tenth session					
	Improvement of the organization and periodicity of statistical data collection						
	Electronic data processing (EDP) in forestry and the forest industries	Seminar: The improvement of data capture methodology in forestry and some 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.