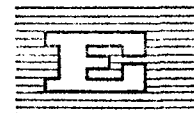


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ECONOMIC COMMISSION FOR EUROPE

TIMBER COMMITTEE

REPORT OF THE THIRTY-EIGHTH SESSION

held at Geneva from 13 to 17 October 1980

As approved by the Committee

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Introduction

1. The Timber Committee held its thirty-eighth session at Geneva from 13 to 17 October 1980. The session was attended by representatives from the following ECE countries : Austria; Belgium; Bulgaria; Byelorussian Soviet Socialist Republic; 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 Soviet Socialist Republic; Union of Soviet Socialist Republics; United Kingdom of Great Britain and Northern Ireland; United States of America; Yugoslavia. 1/
2. The following country participated under article XI of the Commission's terms of reference : Colombia.
3. The following United Nations and specialized agencies were represented : United Nations Conference on Trade and Development (UNCTAD); International Labour Organisation (ILO); Food and Agriculture Organization of the United Nations (FAO).
4. The following intergovernmental organization participated : the European Economic Community (EEC).
5. The following non-governmental organizations were represented : European Confederation of Pulp, Paper and Board Industries (CEPAC); European Confederation of Agriculture (CEA); International Organization for Standardization (ISO); Organisation of European Sawmilling Industries (OES); Tropical Timber Traders Union of the European Economic Community (UCBT).
6. The Committee paid homage to the memory of Mr L. Velay, for many years a delegate of France to the Committee and former Chairman of the Joint FAO/ECE Working Party on Forest Economics and Statistics.

Adoption of the agenda (Item 1 of the agenda)

7. The provisional agenda (ECE/TIM/16), presented by the secretariat, was adopted.

Election of officers (Item 2 of the agenda)

8. The Committee elected Mr D. Hair (United States of America) Chairman, re-elected Mr A. Froncillo (Italy) Vice-Chairman, and elected Mr E. Nowicki (Poland) Vice-Chairman.

Matters arising out of the thirty-fifth session of the Commission (Item 3 of the agenda)

9. The Committee was informed of the Commission's discussion of its work and took note of the resolution and decisions of the Commission, on the basis of TIM/R.57. The Committee agreed to take account of these discussions, resolution and decisions in its session and notably when deciding on its programme of work.

1/ Further information about participation may be obtained from the secretariat : Timber Section, ECE/FAO Agriculture and Timber Division, Palais des Nations, CH 1211 Geneva 10, Switzerland

Activities of other international bodies relevant to the work of the Committee
(Item 4 of the agenda)

10. The Committee was informed of FAO activities relevant to its own interests, notably the fifth session of the Committee on Forestry (May 1980), the Committee on Wood-Based Panel Products (April 1980), which had discussed world production capacity, the outlook for the industry and the investment environment, and the Advisory Committee on Pulp and Paper (June 1980), which had dealt with statistics of production and capacity, the industry outlook, the impact of energy prices and small-scale pulp and paper manufacture. Both the latter Committees had offered their help for the revision of the "Classification and Definitions of Forest Products" (see para. 91 below).

11. The representative of UNCTAD drew the Committee's attention to the first and second part of the Fifth Preparatory Meeting on Tropical Timber under UNCTAD's Integrated Programme for Commodities, which had taken place since the Committee's last session in October 1979. Under the heading of improvement of market intelligence, the meeting recommended that a study should be prepared by UNCTAD and FAO, in consultation with the ECE Timber Committee and interested governments and based upon information supplied by countries, to enable an intergovernmental group of experts to consider the study and submit specific proposals to the Sixth Preparatory Meeting on Tropical Timber. It was proposed that the regional seminars on R & D should take place in January/February 1981, while the Intergovernmental Group of Experts on R and D was scheduled for 21 to 24 April 1981, and that on Improved Market Intelligence from 27 April to 1 May 1981. The Sixth Preparatory Meeting on Tropical Timber was scheduled for 20 to 24 July 1981.

12. The representative of the ILO informed the Committee that the third Tripartite Technical Meeting for the Timber Industry would take place from 1 to 10 December 1981. This meeting would deal essentially with forestry activities and especially with two technical items, namely : security and hygiene; and employment and training especially in the developing countries.

13. The representative of the International Organization for Standardization (ISO) informed the Committee that for ease of reference ISO had compiled this year a list of International Standards (67), Draft International Standards (28) and Draft Proposals (20) in the field of timber, which was at the disposal of members of the Committee.

14. The Committee was informed of the activities of the Forestry Committee of the European Confederation of Agriculture (CEA) and of the results of its recent meeting. In the light of a study presented to this Committee, showing rising production costs and overall prices as well as a decline in investments in Austria, the Federal Republic of Germany and Switzerland, for the period 1970-79, the CEA's General Assembly had passed a resolution asking governments to encourage forest production.

Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers (Item 5 of the agenda)

15. The Committee was informed of the results of the thirteenth session of the Joint Committee, held in Madrid from 6 to 9 May 1980 at the invitation of the Government of Spain. It approved the Joint Committee's report, including the proposed programme of work (TIM/EFC/WP.1/10). The Timber Committee was also informed of the study tour in Spain and the Seminar on afforestation and reforestation machines and techniques which preceded the Joint Committee session, on the basis of the report of the Seminar (TIM/EFC/WP.1/SEM.9/1). It warmly thanked the Government of Spain for the excellent organization of the session, Seminar and study tour.

16. The Committee approved the organization, under the auspices of the Joint Committee, of a seminar on the integrated use of wood raw material in logging operations, which the USSR proposed to host in 1982. It noted that the emphasis of this seminar will be placed on primary conversion of wood and wood residues, and it will not deal with secondary conversion. It pointed out, however, the need to avoid any possible duplication with a seminar on planning of internal and external transport in forestry and its combination with forest operational activities, to be held in Norway in 1982, in conjunction with the fourteenth session of the Joint Committee. It therefore recommended that the Steering Committee and the secretariat collaborate closely with the authorities of the two host countries in drawing up the programmes of these seminars, so as to make them complementary and avoid possible overlap.

17. The Timber Committee noted with appreciation that the work of the Joint Committee had become more effective since its reorganization, thanks both to an efficient Steering Committee and the excellent collaboration of the member countries. It supported the Joint Committee's efforts further to streamline its programme.

18. The Timber Committee was also informed of the results of the Seminar on vocational training and extension services for small-scale forest owners and farmers, held in Honne, Biri (Norway) from 10 to 14 March 1980, at the invitation of the Government of Norway, on the basis of the Seminar's report (TIM/EFC/WP.1/SEM.8/2). It expressed its great appreciation to the Government of Norway for the most successful Seminar.

Review of Timber Committee activities between its thirty-seventh and thirty-eighth sessions (Item 6 of the agenda)

(a) Symposium on economic and technical developments in the furniture industry

19. The Committee was informed of the results of the Symposium held in Poznan from 5 to 9 November 1979, at the invitation of the Government of Poland, by Mr J. Kozinski (Poland) on the basis of the report of the Symposium (TIM/SEM.10/2). The Committee regretted the limited participation in the Symposium by a number of countries with highly developed furniture industries whose co-operation the Symposium considered would have been most valuable. The Committee noted the importance of the furniture sector for many forest products and endorsed the conclusions and recommendations of the Symposium. It expressed deep appreciation to the Government of Poland for the excellent organization of the Symposium, which had included a one-day excursion to a particle board mill and to factories producing furniture and wood-working machines, as well as visits to furniture exhibitions.

(b) Activities of the team of specialists on stress grading and finger-jointing of coniferous sawnwood

20. The Committee was informed of the team's activities by the team's Chairman, Mr W.E. Townsley (Canada) on the basis of the document TIM/R.58, which it endorsed. It approved the team's suggestion that the two ECE recommended standards should be revised, as well as the timetable proposed by the team :

- countries should submit proposals for amendments to the recommended standards. These proposals should reach the secretariat by 31 December 1980;
- the team of specialists should meet again in March 1981 to review these proposals and prepare an integrated proposal for submission to an ad hoc meeting;
- an ad hoc meeting should take place in June 1981 to revise the recommended standards and submit its recommendations to the Committee's thirty-ninth session in October 1981.

21. The Committee noted with pleasure that the R & D Liaison Committee of the European Softwood Conference had been co-operating actively with the team of specialists and that there had been an exchange of views and documents with the secretariat of ISO TC 55. The delegation of the USSR, on behalf the ISO TC 55 secretariat, invited the Committee to participate in TC 55's plenary session in 1981. The Committee requested the secretariat to arrange for the Committee to be represented at this session, if this was at all possible, and expressed the hope that ISO, notably TC 55, would continue to participate in the work on standardization of stress grading and finger-jointing of coniferous sawnwood.

(c) Symposium on wood-based panels in the 1980s : economic and technical perspectives

22. The Chairman of the Symposium, Mr L. Levón (Finland) informed the Committee on the results of the Symposium, which took place at Helsinki from 12 to 16 May 1980, at the invitation of the Government of Finland. The Committee approved the report of the Symposium (TIM/SEM.11/2), including the conclusions and recommendations. The Committee expressed its deep appreciation for the excellent organization of the Symposium, as well as for the interesting two-day visits.

23. The Committee endorsed the proposal of the Symposium to re-examine, within the framework of the Joint FAO/ECE Working Party on Forest Economics and Statistics, the problem of the definition of "production capacity" in the wood-based panels industry. It remained important to find a satisfactory indicator of the production potential of the wood-based panels industries under optimal market conditions. It supported the setting up of an informal group of industry representatives by the FAO Committee on Wood-Based Panel Products to formulate proposals to the Working Party.

24. The Committee expressed its deep appreciation to Finland for publishing the proceedings of the Symposium as "Wood-Based Panels in the 1980s", thus making available to experts in many countries the valuable information contained in the papers submitted to the Symposium.

(d) Seminar on the production, marketing and use of finger-jointed sawnwood

25. The Committee was informed of the results of the Seminar, which had taken place at Hamar at the invitation of the Government of Norway from 15 to 19 September 1980, by the Seminar's Chairman, Mr R. Birkeland (Norway). The Committee approved the Seminar's report (TIM/SEM.12/2) and endorsed its conclusions and recommendations, notably the recommendation that : "ECE member governments, working within the framework of the Timber Committee, should participate actively in the drawing up of a single international standard based on the existing ECE Recommended Standard" (TIM/SEM.12/2, para. 23 (i)). The Committee invited the team of specialists and the ad hoc meeting responsible for revising the Recommended Standard (see para. 20) to take the Seminar's conclusions and recommendations into account when preparing their proposals.

26. The Committee also endorsed the Seminar's opinion that it was desirable that the provisions of the Recommended Standard be incorporated in the Building Codes at present being prepared by the European Economic Community (EEC). It requested the secretariat to draw the Seminar's opinion to the attention of the appropriate organs in the EEC.

27. The Committee warmly thanked the Norwegian authorities for their efficiency and generosity in organizing this most successful Seminar as well as the interesting visits which had been arranged for participants.

Market trends and prospects (Item 7 of the agenda)(a) Organization of market discussions

28. The Committee discussed the organization of its market discussion on the basis of a note prepared, at the request of the office-holders, by the secretariat, in consultation with Mr A. Froncillo (Italy) and Mr F. Palmer (United Kingdom) (TIM/R.59). In considering the proposals, the Committee underlined the importance of the market discussions as a focal point at its annual session. They were of major importance not only for ECE Governments but also for trade and industry all over the world, notably in developing countries exporting forest products to world markets.

29. A number of changes were made, on a trial basis, to the procedure followed in previous years, to improve the quality of the discussion. The Committee considered that the resulting discussion had shown most positive results. It agreed, therefore, that the system followed at this year's session should be maintained and that next year's market discussion should be organized on similar lines :

- (a) a brief round-the-table presentation of countries' written statements;
- (b) a description of general economic conditions by a member of the secretariat (no discussion);
- (c) for each of the four market sectors, the discussion to be introduced by a member of the secretariat who would present the Committee's forecasts;
- (d) the discussion on each market sector should be led by a small panel (2-3 experts).

30. The Committee expressed its thanks to the members of the panels who had contributed greatly to the success of the discussions.

(b) Developments in 1980 and prospects for 1981

31. The Committee heard a brief statement from each delegation on recent developments in its country's economy and in the main forest products markets, which supplemented countries' written statements. The Committee took note during its discussions of the Annual Forest Products Market Review (Supplement 1 to Volume XXXIII of the Timber Bulletin for Europe), prepared by the secretariat, and of the brief comments by the secretariat on recent market developments in TIM/R.60. It drew up tables of countries' estimates for 1980 and 1981 of domestic requirements, production, imports and exports of sawn softwood, coniferous logs, hardwood logs and sawnwood, particle board, plywood, fibreboard and pulpwood. A summary table is presented in Annex I.

Background

32. Market expansion, which had been fairly strong in 1979 for most forest products in Europe, continued in the early months of 1980, accompanied by a firming trend in prices, notably for softwoods. The impact of measures to reduce inflation, public expenditures and external trade deficits in many western European countries, however, slowed down economic activity from about mid-1980. Markets for the forest products dealt with by the Committee have, in consequence, become quieter, and for several products consumption and trade in the second half of 1980 is expected to be well below those in the same period of 1979.

33. New construction activities have remained low in most western European countries, but the negative effect of this on consumption of forest products has been partly offset by continued activity in the repair, renovation, maintenance and do-it-yourself fields, despite a growing shortage of cash availability, by a larger share of single-family houses in new dwelling construction, and growing interest in timber-framing in a number of countries where this type of construction is not traditional. To exploit outlets like these, the Committee stressed the need for more intensive work towards improved product quality and performance and market development. These measures could only have a beneficial effect on the competitiveness of forest products.

34. High interest rates are inducing stock reductions during 1980. Supply difficulties or delays have been partly responsible for the low level of raw material stocks in some countries.

35. The twelve months since the Committee's thirty-seventh session in October 1979 witnessed a deep recession in the United States housing market, culminating in the late spring of 1980, since when some steps towards recovery have occurred in construction as well as in the United States economy as a whole. Consumption of sawn-wood and wood-based panels in 1980 will be markedly reduced in the United States compared with 1979. Some repercussions are being felt in other markets, including Europe.

36. With regard to eastern Europe and the USSR, problems in the allocation of resources and related difficulties seem to have persisted in 1980. Nevertheless, some improvements are expected in overall economic growth rates this year compared to the disappointing 1979 results.

37. The United States economy is expected to continue its recovery in 1981, but the pace and strength of the recovery is difficult to predict, given the continuing threat of renewed high inflation rates and the measures being maintained to combat them, including monetary restrictions. The outlook for western European countries is also uncertain but generally speaking no marked upturn in economic activity is foreseen in the coming year.

38. The Committee stressed, however, that in several respects the forest products market is in better shape to face the uncertain prospects for 1981 than it was in some earlier periods of cyclical downturn, notably due to lower stock-holdings, a more streamlined structure and capacity of industries, and less speculative build-up of forward commitments.

Sawn softwood and coniferous logs

39. Domestic requirements of sawn softwood in Europe (excluding the USSR) in 1979 reached 78.8 million m³, or almost as high as the record volume in 1973. For 1980 domestic requirements are estimated to decline by 1.4 million m³ or 2 % to 77.4 million m³. Production, on the other hand, is expected to show a further rise of 1 million m³ to 72 million m³. Imports are forecast to fall in 1980 by 2.2 million m³ or 7½ % to 27.3 million m³ and exports (including those of the USSR) by 1.3 million m³ or 4 % to 28.8 million m³. Since imports and exports in the first half of 1980 were not very different from those in the same period of 1979, the Committee's forecasts infer a marked downturn in trade in the second half of 1980.

40. For 1981, European domestic requirements, imports and exports are forecast to decline further, by 2.1 million m³ (2½ %), 2.1 million m³ (7½ %) and 833,000 m³ (3 %) respectively, compared with the 1980 estimates, while production is expected to return to approximately the 1979 level. The forecasts for both production and

exports show smaller decreases than those for domestic requirements and imports. However, in several exporting countries, stocks are lower than ever in 1980 and will still be below normal at the beginning of 1981. Restocking by some exporters will be desirable to make up a better assortment composition. Furthermore, producers, who will be faced with higher raw material and other production costs, can be expected to curtail output in the event of supply outrunning demand, rather than face the prospect of selling at uneconomic price levels.

41. Since spring 1980, importers have sharply reduced forward buying in face of the prospect of weaker demand and in order to minimize the heavy cost of stock-holding at a time of high interest rates. There has been some tendency for importers' stocks to rise; generally they are higher than for several years, but not excessive. Those held by consumers in importing countries have been reduced during 1980.

42. Domestic requirements of sawn softwood in North America are estimated to fall steeply in 1980, by 19.5 million m³ or 18 % - to 86.2 million m³, with the United States accounting for virtually the whole of the decline. Both its own production and imports from Canada are falling in line with this trend. Partly offsetting the reduced exports to its principal market by increased shipments to other areas, Canada's exports in total are estimated to amount to some 8 % less than in 1979. In view of its increased offshore exports during the first half of the year, exports to Europe in 1980 are expected to rise along with those to some other overseas markets. United States exports are forecast to rise by 1 million m³ (24 %) to 5.2 million m³, with Japan as a major customer.

43. In 1981, the United States forecasts a partial recovery in domestic requirements, production and imports in the expectation that housing starts and other markets will be somewhat higher than the depressed 1980 levels. The Committee noted that latent demand for housing in the United States in the 1980s of over 2 million units a year is well above the estimated 1.5 million starts in 1981, and demand for sawn softwood and other forest products will recover strongly sooner or later, when economic conditions improve. While Canadian total exports of sawn softwood are forecast to rise next year, reflecting the partial recovery in the United States of America, its exports to Europe are estimated to decline somewhat due to reduced activity in the construction sector.

44. Under the conditions of restrained demand foreseen in Europe in the coming year, the Committee noted the need to maintain a stable market and welcomed the statements from several European exporting and importing countries of their willingness to co-operate towards this end. It expected the forward market for 1981 to open late and develop slowly, and in consequence it would be necessary for sellers to act with patience. The present downturn in trade would not be as deep as that of 1974/75 but the recovery, which could begin during the second half of 1981, could be more gradual, given the uncertain economic and monetary prospects in many western European countries.

45. The Committee discussed the growing importance of the countries of North Africa and the Middle East as markets for sawn softwood, but noted the problems of obtaining statistical information on these markets. Several exporting countries offered assistance towards improving this situation. The Committee also felt that inadequate knowledge of stocks and of the relative importance of and trends in particular end-use sectors, such as the increasingly important one of repairs and maintenance of buildings, hampered market analysis. Possible steps to improve this situation should be examined.

46. For coniferous logs, the volumes of European domestic requirements, production and trade in 1980 and 1981 are not expected to change greatly from the 1979 levels. The Committee noted that availability of logs was adequate in the majority of countries, although everywhere log prices had been tending to rise during 1980. A few countries reported supply difficulties caused by bad weather conditions or transport problems.

Hardwoods

47. European consumption of sawn hardwood reached a new record level in 1979 of 22.4 million m³. Imports of sawn hardwood in 1979, a record of 6.67 million m³, were nearly 1 million m³ above the level of 1978. The bulk of the increase has been due to higher imports of tropical sawnwood, but it should be noted that imports of temperate zone hardwoods essentially from the United States, although concerning smaller volumes, have considerably increased in recent years.

48. The upward trend of Europe's imports of sawn hardwood continued in the early part of 1980, but a reversal has been evident from the second quarter onwards. For the whole of 1980, the Committee forecasts a moderate drop in imports, as well as in production and exports. Europe's domestic requirements in 1980 would thus be more than 250,000 m³ lower than in 1979. The decline is seen as the result of a weaker demand in several important wood-using sectors, including furniture and building joinery manufacturing, and, especially in the case of tropical sawn hardwood and sawn oak, the existence of relatively large stocks. Prices of these assortments have been under the influence of weaker prices in south-east Asia and North America while, in contrast, those for sawn beech, of which increasing European exports to countries in North Africa and the Middle East helped to stabilize the market, remained firm.

49. Consumption of sawn hardwood in North America is expected to show a drop in 1980, especially in the United States, where a fall in production of 3.3 million m³ and a drop in imports, together with an increase of one-third or 300,000 m³ in exports to 1.2 million m³, accounts for the fall forecast in consumption of 3.8 million m³, or 21 %.

50. European consumption of hardwood logs decreased in 1979 due to lower production, not fully offset by higher imports. For 1980, domestic requirements are forecast to increase marginally to the near record level of 42.0 million m³, with roughly equal increases in production and imports. The long-term downward trend in imports of tropical hardwood logs would thus be interrupted for the second successive year. Overall, imports of tropical hardwood in the ECE region are being affected increasingly by rising demand in the markets of the tropical producing countries themselves and their immediate region, as well as in the newly emerging importing markets, in particular in the oil-exporting countries.

51. For 1981, the Committee forecasts, for Europe, a marginal increase in sawn hardwood production, a fall, by half a million m³, in imports, essentially of tropical origin, but moderately higher exports. Europe's domestic requirements are forecast to fall by 392,000 m³ to 21.71 million m³. Drops in European imports of both temperate-zone and tropical species, as well as in exports, are also forecast for hardwood logs, against a small increase in production. Europe's domestic requirements are estimated to be about 1 % lower than in 1980.

52. In contrast to Europe, an appreciable recovery is forecast for domestic requirements of sawn hardwood in North America in 1981; production is expected to recover by nearly 2 million m³ or 13 % in the United States, and imports by 200,000 m³ (+ 29 %) back to their 1979 level.

Wood-based panels

53. European domestic requirements of the three wood-based panels combined (particle board, plywood and fibreboard) are estimated by the Committee to remain remarkably constant between 1979 and 1981, within the range of 34.5 to 34.9 million m³. This steadiness contrasts with the modest declines forecast for the two-year period in the requirements of sawn softwood and hardwood. As a result, wood-based panels' share of the total requirements of sawnwood and panels may show a further slight rise to over 26 %.
54. Forecasts for the domestic requirements of the three panels show similar trends. They infer that the share of particle board in the total which had grown steadily in the past to reach 70 % in 1979 would not increase further in 1980 and 1981.
55. In the United States, sharp decreases in domestic requirements for wood-based panels are predicted for 1980, in line with those for sawnwood, with the falls in plywood and fibreboard more marked than for particle board. Partial recoveries are foreseen in 1981; for particle board, the 1981 requirement may surpass the 1979 volume.
56. Production of particle board in Europe is expected to be close to the volume of requirements; producers are following a cautious policy with regard to output levels and new investment, in view of the uncertain prospects. As at previous sessions, the Committee's export estimates are slightly more optimistic than imports: that is to say, exports in 1980 and 1981 are expected to remain at the 1979 level, but imports to be somewhat lower. On past evidence, the export estimates may prove to be the more accurate.
57. The main feature of the plywood estimates is a drop of 8 % in European imports in 1980, very largely the result of an expected drop of 26 % in United Kingdom arrivals. A partial recovery is foreseen for 1981. These movements are partly reflected in the export estimates which show a declining trend over the two-year period, which may also be influenced by the competition of suppliers in Asian countries. The latter have been affected in turn by the sharp fall in purchasing by the United States, their largest market.
58. The estimate of United States plywood imports in 1980 of 1 million m³ shows a drop of 800,000 m³ or 44 % from 1979. Some recovery in imports is foreseen for 1981.
59. In line with the marginal rise in domestic requirements, production and imports of fibreboard are estimated to increase slightly in Europe in 1980 and 1981. Exports show little change.
60. Reviewing the estimates for 1980 and 1981, the Committee felt that care was needed in assessing their significance. In a number of countries, notably the Federal Republic of Germany and the United Kingdom, reselling of imported goods had slowed down markedly in the third quarter of 1980 and stocks of wood-based panels were quite large; this had created a cautious approach towards new forward commitments on the international market. In some countries, there are plans to curtail production in order to maintain the supply/demand balance.
61. For 1981, domestic requirements of particle board, plywood and fibreboard are forecast to be higher than in 1980, but the marginal nature of the expected increases underlines the caution with which the market for next year is at present being viewed. The Committee stressed the importance of producers following carefully developments in demand and adjusting production schedules accordingly.

62. Attention was drawn to the large expansion of plywood capacity being planned in Indonesia and the changes taking place in the log supply situation in south-east Asia. The likely impact of these developments on the European plywood market was difficult to assess; on the one hand, growth in plywood offers might add further to the competition faced by European producers; on the other hand, domestic consumption in south-east Asia, notably Indonesia, could theoretically absorb any foreseeable growth in output. It would be important to monitor developments in Asia and promote exchange of market information between countries there and in the ECE region.

Pulpwood

63. The pulp and paper sector in Europe and North America in 1979 and the first part of 1980 continued to be characterized by strong demand, rising production, high capacity operating ratios and strong price rises. In the early summer of 1980, however, this situation changed and demand began to fall as the recession in the United States gathered strength. In mid-1980 production levels were lower than those of a year before in several countries, including the United States.

64. The Committee's estimates of domestic requirements for pulpwood in 1980 reflect this change from high demand in the early months to a slow-down in the second half of the year. It is estimated that European domestic requirements for the year as a whole, at 169 million m³, will be 3.2 % above those in 1979. The Nordic countries as a group, however, estimate increases of less than 2 %. Domestic requirements in the United States are also expected to rise only slightly.

65. European domestic supply is estimated to expand by 4 % to 162 million m³ in 1980. While Sweden and a number of other countries foresee minor increases or small falls, marked rises are estimated by Finland (+ 9 % to 28 million m³), the Federal Republic of Germany (+ 7 % to 14.7 million m³), Portugal (+ 6 % to 7 million m³) and Yugoslavia (+ 10 % to 3.9 million m³). In many European countries the pulpwood-using industries have had difficulties in obtaining supplies from local sources, causing them to turn to other sources of raw material, notably imports, or even, in some cases, to curtail production. Several new sources of supply, inside and outside Europe, have come onto the market. Although circumstances differ widely between countries and regions, in many cases the reasons for this situation may be found in pulpwood harvesting costs and rising price expectations for pulpwood, encouraged by the strong growth in demand for fuelwood and the high prices offered for this previously neglected assortment. In some countries the prices for fuelwood are above those for broadleaved pulpwood, and a certain amount of pulpwood is in fact being transferred to the fuelwood market. In response to these developments, pulpwood prices have risen in many countries, sometimes sharply : these increases may bring more pulpwood onto the market.

66. Trade in pulpwood rose sharply in the first half of 1980 (by over 20 % for European exports and imports), but for the year as a whole the estimated increases are lower : European imports of pulpwood, including residues and chips, are expected to rise by 10 % to 19.9 million m³ and exports by 5.1 % to 13.3 million m³. North American exports are estimated to rise by 8 % to 12.9 million m³. Exports from the USSR, however, are expected to fall by nearly 10 % to 5.4 million m³.

67. For 1981 only modest increases in pulpwood consumption are foreseen. In Europe domestic requirements are expected to rise by 1.2 % to 171 million m³, while in the United States a rise of under 2 % is forecast. European imports are expected to fall by 1 % and exports by over 7.4 %, while North American exports may rise. These forecasts seem to indicate that the Committee does not expect an early or strong recovery from the slow-down in growth of the pulp and paper sector which started in 1980.

(c) Medium-term survey of the wood-based panels sector

68. The Committee was informed of the results of the Medium-term survey of the wood-based panels sector, published as Supplement 10 to Volume XXXII of the Timber Bulletin for Europe. The survey examines trends in the consumption and supply of the three types of panels : particle board, fibreboard and plywood. It describes developments since 1965 in the structure and capacity of the wood-processing industries and trends in the consumption of raw materials by the wood-based panels industries.

69. The Committee, in noting the conclusions of the survey, reaffirmed the importance it attached to studies on the wood-based panels sector. The comparison of medium-term trends and of the forecasts in the long-term timber trends and outlook studies are of particular importance in providing early warnings to planners and decision-makers of deviations from expected long-term prospects.

Wood and energy (Item 8 of the agenda)

(a) Exchange of information on national policies and outlooks

70. As proposed by the team of specialists on wood/energy questions, and on the basis of document TIM/R.61/Add.1, delegations were invited to present to the Committee their national policies and outlooks for wood and energy. Twenty-five delegations presented written statements or made oral statements, which covered :

- those aspects of national energy policies which would affect the forest and forest industries sector, and
- whether and how forest policies were being modified to take into account new developments in the energy field.

Although there were great differences between the situations in different countries, it appeared that all countries had made a useful assessment of their own situation, and were attaching new importance to a sector which had previously been neglected. In all countries efforts were being made to minimize the quantities of wasted wood raw material by using them as fuel whenever this was appropriate. The forest industries and rural households were the main consumers of wood-derived energy. In some countries, especially some with a large forest resource, government policies were encouraging the development of an energy source which was domestic, decentralized and renewable. Using wood for energy could also help to make more economic the upgrading of **scrub** or degraded forest.

71. The Committee thanked the delegations for their most interesting presentation, recognizing that this was a most important area where developments were likely to have a major influence on raw material supply for forest products.

(b) Future activities of the Timber Committee in the wood/energy field

72. Mr A. Semadeni (Switzerland) presented the suggestions of the team of specialists which had been set up by the Committee at its thirty-seventh session (TIM/R.61). The team had proposed that the Committee concentrate on :

- (a) exchange of information on national policies and outlooks;
- (b) improvement of the information base at the international level;
- (c) exchange of information on energy conservation in the mechanical wood-processing industries and the use of residues from these industries as a source of energy;
- (d) integration of energy aspects into the interim review of European timber trends and prospects.

73. The Committee endorsed these proposals and agreed that its work in this field should proceed along these lines. The exchange foreseen in (a) had been organized at the present session : the team should suggest to the Committee when it considered conditions were suitable for another such exchange.

74. The Committee requested the team of specialists at its next meeting to continue its work along the lines set out in the annex to TIM/R.61 and to report back to the Committee at its thirty-ninth session. The secretariat should continue negotiations with possible host countries for the proposed seminar on energy conservation and self-sufficiency in the sawmilling industry.

75. Mr G. Bildesheim, the FAO Regional Representative for Europe, informed the Committee of his office's work in the field of wood energy. A major study on new and renewable energy in agriculture, which included a general review, technical annexes, a case study of protected crops and a brief review of the forestry aspects, prepared in collaboration with the ECE/FAO Agriculture and Timber Division, had been presented to the FAO European Commission on Agriculture and the Regional Conference for Europe. The latter meetings had endorsed the study's suggestions that a co-operative research network be set up on rural energy and that pilot projects be started on integrated rural energy systems. These decisions were being implemented. The Committee noted the close interrelation between rural energy problems and wood/energy problems and invited its team of specialists and the secretariat to continue to co-operate actively with the appropriate FAO bodies in this area. The delegation of the USSR expressed its country's interest in participating in this co-operative research network. Modalities of participation should be discussed with the appropriate FAO organs.

76. The Committee noted with satisfaction that the team of specialists, when preparing its proposals for the Committee, had taken fully into account the activities of other international bodies and asked the team and the secretariat to co-operate actively with these bodies, notably the IEA Forestry Energy Project.

77. It was suggested that the work on generating energy from residues might concentrate on those residues which were difficult to use (e.g. logging residues). The Committee requested the team of specialists to take this point of view into account in its work.

78. The Committee agreed to appoint Mr A. Semadeni (Switzerland) as leader of the team of specialists. It thanked the members of the team for the successful start they had made to their work on this important project.

Special lecture (Item 9 of the agenda)

79. As recommended by the office-holders, the special lectures presented to the Committee were on long-term trends and prospects for the forest and forest products sector in selected countries outside Europe.

80. The presentation by Mr D. Hair (United States of America) was based on the review draft of "An Analysis of the Timber Situation in the United States 1952-2030", recently issued by the USDA Forest Service. Mr Hair outlined the projected expanding demand for timber in the United States for the next five decades as a result of the substantial growth expected in population, economic activity and income for the same period. The study forecast a rise in real prices for forest products, notably softwoods.

81. There were many opportunities to increase and extend timber supplies. Substantial investments for a better use of existing technology and for further research, as well as investments in management practices, would be required to meet projected demands for timber products. There was also a need to explore

further the economic, social and environmental implications of a future in which the demand for nearly all forest products is likely to increase more rapidly than supply.

82. Mr E.J. Ward (Canada) presented a study entitled "A Review of the Canadian Forest Products Industry" which was prepared and published by the Department of Industry, Trade and Commerce in Canada. Canada is moving from the exploitation of virgin timber forests to more intensive forest management, and in making this change it has to recognize the wide variations in the resource which are evident in a country of that size. Mr Ward also outlined some of the problems applicable to most modern economies such as environmental problems, infrastructure and the massive capital investment required, as well as some of the technical solutions envisaged in Canada.

83. A presentation by Japan was also made available to the members of the Committee. It consisted of an extract from a document issued by the Ministry of Agriculture, Forestry and Fisheries of Japan entitled : "Basic Plan for Japan's Forest Resource and Long Range Demand and Supply Projection for Important Forest Products". This document which had been approved at the Cabinet Council in May 1980, reviewed the long range demand and supply projection for timber and the tasks associated with the demand and supply of forest products in Japan in the future.

84. In the lively discussion which followed the presentation, many points were raised including the price assumptions used, the outlook for the construction sector in the United States, the potential of the southern states and the characteristics of their forest resource, and the international consequences of future developments in the United States and Canada, both major producing countries of forest products.

85. The Committee thanked the lecturers warmly for their most interesting presentations and, in view of the value of the lectures, agreed that they should be published as a supplement to the Timber Bulletin for Europe.

Timber Committee Yearbook (Item 10 of the agenda)

86. The secretariat presented the draft of a Yearbook (TIM/R.63) for the Committee's consideration. The Yearbook was intended to make the Committee's work known to a wide range of experts who could benefit from its activities. The Committee strongly endorsed this concept and invited the secretariat to issue a publication in early 1981 (covering activities in 1980) along the lines suggested, as a supplement to the Timber Bulletin for Europe.

87. The Committee stressed that :

- the presentation of the Yearbook (layout, graphs, quality of paper etc.) should be the best possible;
- sufficient copies should be produced for wide distribution to interested experts.

88. A number of detailed comments were made on the contents of the draft. The Committee requested delegations who so wished to send their comments on the draft in TIM/R.63 to the secretariat by 30 November 1980, along with an indication of how many copies would be needed for distribution in their country.

89. The Committee agreed to discuss at its thirty-ninth session, on the basis of experience gained with the first Yearbook, whether this publication should be repeated and if any modifications were necessary.

Activities of other Principal Subsidiary Bodies of ECE of interest to the Timber Committee (Item 11 of the agenda)

90. The Committee was informed on the basis of document TIM/R.64 of the activities of other Principal Subsidiary Bodies of ECE dealing with problems of concern to it. The Committee took note of the document and agreed to take the information presented into account when discussing its own programme of work.

Programme of work for 1981-1985 (Item 12 of the agenda)

(a) Activities scheduled for 1981

(i) Ad hoc meeting to revise the FAO classification and definitions of forest products

91. The Committee was informed of preparations for this meeting, scheduled for 2 to 4 March 1981, on the basis of its Provisional Agenda (TIM/EFC/WP.2/AC.1/4). Proposals for revisions to the Classification and Definitions were being prepared by the secretariat, in close co-operation with the FAO Forestry Department, the FAO Committee on Wood-Based Panel Products, the FAO Advisory Committee on Pulp and Paper and interested national experts.

(ii) Proposed ad hoc meeting on a questionnaire for forest resource assessment

92. The secretariat informed the Committee, on the basis of TIM/R.65, that the preparation of a questionnaire on forest resource assessment, under projects 14.5.2.3. and 14.4.1. of its programme of work, had proved very complex. The Timber Committee office-holders had proposed that an ad hoc meeting be convened to help in the preparation of a questionnaire which would assess satisfactorily total forest biomass and the role of forests in supplying environmental and other non-wood goods and services. The Committee endorsed this suggestion as well as the draft provisional agenda for the meeting, annexed to TIM/R.65. It agreed that the meeting should take place from 4 to 6 March 1981 and requested the secretariat to make the necessary arrangements.

(iii) Joint FAO/ECE Working Party on Forest Economics and Statistics

93. Mr E. Clicheroux (Belgium), Chairman of the Working Party, informed the Committee that the thirteenth session of the Working Party was scheduled for 9 to 12 June 1981. He outlined briefly the main questions which would be on its agenda.

(b) Review and revision of the draft programme of work

94. The Committee considered its programme of work on the basis of a draft prepared by the secretariat (TIM/R.66) which took into account the programme it approved at its thirty-seventh session, the resolution, decisions and discussions of the Commission at its thirty-fifth session, the results of meetings of the Committee's subsidiary bodies, as well as its own discussions under other items of the agenda.

95. The Committee agreed that work should start soon on defining the scope of the study, scheduled for 1984, on medium-term trends in the structure and capacity of the sawmilling industry (project 14.1.2.2.). Accordingly, the team of specialists should be established in 1981 and submit its recommendations to the Timber Committee's fortieth session in 1982 (since the Joint FAO/ECE Working Party on Forest Economics and Statistics will not meet that year), so that countries could be warned well in advance about the information they would be required to provide for the 1984 study. This would allow them to undertake special enquiries, if necessary, to obtain this information.

96. In order to provide the Committee with a basis for another examination of trends in the wood and energy sector in 1982, it agreed that the survey of medium-term trends in the markets for pulpwood, pitprops and miscellaneous roundwood (project 14.1.3.) should cover fuelwood and other forms of wood for energy, as the previous survey had done in 1979.

97. The Committee invited the countries concerned to give serious consideration to the scope and programme for the ad hoc meeting on the production and marketing of products of specific interest to Mediterranean forestry, including cork and resin, proposed under project 14.1.4. The secretariat should explore the question with interested countries, including the matter of a host country, and submit proposals to the thirty-ninth session.

98. With regard to its review of standardization activities (project 14.2.3.), the Committee agreed on the necessity of maintaining close contact with ISO and its relevant Technical Committees; this should be reflected in the description of this project in its programme of work.

99. The Committee requested the ad hoc meeting on the standardization of stress grading and finger-jointing of coniferous sawn timber, scheduled for 1981 (projects 14.2.4. and 14.2.5.) to give careful consideration to activities which should follow up its revision of the recommended standards, including the training courses mentioned in its programme of work, and submit its proposals to the thirty-ninth session.

100. The Committee agreed that, before any work was undertaken on furniture within the framework of project 14.2.7. - Classification and definitions of forest products, the Joint FAO/ECE Working Party on Forest Economics and Statistics should examine the possibilities it had to undertake such work and submit its findings to the thirty-ninth session.

101. The Committee noted that some of the recommendations for future work, which had been made by the two symposia and one seminar held since its thirty-seventh session, had been incorporated in various projects in its programme of work. It agreed to retain the following projects in the programme :

- (1) Economic and technical developments in the furniture industry
(project 14.3.3.)
- (2) Modernization in the wood-based panels industries (project 14.3.4.)

It invited countries to submit to the secretariat by 31 December 1980 their proposals for further activities in these fields. On the basis of these proposals and the reports of the two symposia, on economic and technical developments in the furniture industry (TIM/SEM.10/2) and on wood-based panels in the 1980s : economic and technical perspectives (TIM/SEM.11/2), its thirty-ninth session should decide on future activities. The Committee considered that as follow-up to the Seminar on the production, marketing and use of finger-jointed sawnwood was covered by other projects, project 14.2.8. - Economic and technical developments in finger-jointing of sawnwood should be removed from the programme, at least for the time being.

102. The Committee noted that the chemical processing of wood (other than for pulp and paper) (project 14.3.5.) was potentially of great importance for the forest products sector. Although research on the technical aspects had been undertaken in a number of countries, the present and potential significance of this use for wood had not yet been quantified on the international level. The Committee requested the thirteenth session of the Joint FAO/ECE Working Party on Forest Economics and Statistics to attempt a rough assessment of the relative importance

of the use of wood in chemical processing within the total of wood use, on the basis of which the Committee could determine the priority it should give to work in this field. In addition, as some of the chemical processes involved were similar to those used for the manufacture of liquid or gaseous fuels from wood, the Committee invited the team of specialists on wood/energy questions to consider whether it could make any contribution to the Committee's work on chemicals from wood.

103. The delegation of the Federal Republic of Germany informed the Committee that its Government was considering the possibility of acting as host in 1982 to the seminar on energy conservation and self-sufficiency in the sawmilling industry (project 14.4.2.). The Committee welcomed this information and requested the competent authorities of the Federal Republic of Germany, assuming a positive decision is taken on this point, to enter into preliminary discussions with the secretariat and the team of specialists on wood/energy on the programme, organization, etc.

104. The Committee noted that during its market discussions, many delegations had mentioned the need for better information on stocks and end-uses for forest products. In view of the importance of both questions for a thorough understanding of market conditions and trends in demand, the Committee requested the Joint FAO/ECE Working Party on Forest Economics and Statistics to examine them again to determine whether any improvement in the situation were possible.

105. The Committee noted that the USSR had offered to nominate experts to prepare studies on economic aspects of the fuller use of the forest biomass (project 14.5.3.1.) and economic aspects of the introduction of new forest machines and equipment (project 14.5.3.3.). It thanked the Government of the USSR for this offer, considering that these reports could form the basis of the Working Party's discussions on these points, and urged other governments also to nominate experts to prepare reports on these topics. In view of the relative state of preparations on project 14.5.3.2. (Economic aspects of afforestation and reforestation) and on project 14.5.3.3., the Committee considered that the former could be discussed by the Working Party at its fourteenth session and the latter at its thirteenth session. The publication on afforestation and reforestation, being prepared by the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers under project 14.3.1.1.1., should thus be ready before the question was taken up by the Working Party.

106. The delegation of the United States of America circulated the programme of the study tour in that country, which would take place from 13 to 23 September 1981 on the West Coast of the United States of America.

107. The delegation of Czechoslovakia offered to act as host to the Timber Committee study tour in 1982. The Committee accepted this offer with gratitude and asked the Czechoslovak authorities, in consultation with the secretariat, to prepare a programme for presentation to the Committee's thirty-ninth session.

Other business (Item 13 of the agenda)

108. The delegation of the USSR showed a film on the exhibition on forest and woodworking machines "Lesdrevmash 1979" held in Moscow last year. The Committee thanked the USSR delegation for its most interesting film and presentation.

109. At the invitation of the Swiss delegation, delegates to the Committee visited the forest of Versoix in the Canton of Geneva on the morning of Friday, 17 October. The Committee warmly thanked the Swiss delegation and the authorities of the Canton of Geneva for the interesting visit and most generous hospitality.

110. The Committee noted that some of the documentation for its session had not been prepared and issued in time. The situation had been particularly unsatisfactory for documents in Russian. The lack of this documentation had in fact made the task of some delegations significantly more difficult. The Committee therefore requested the secretariat to take all possible steps to ensure that this did not happen again.

Adoption of the report of the Committee's session (Item 14 of the agenda)

111. The draft report presented by the secretariat was adopted, with some modifications which have been incorporated in the present document.

Date of next session

112. The Committee agreed that its next session should be held from 12 to 16 October 1981, subject to the availability of conference services for that period.

Annex I

Europe (excl. USSR) : Summary table of market forecasts for 1980 and 1981
(million m³)

	Domestic requirements		Production		Imports		Exports					
	1979 (actual)	1980 (estimates)	1981 (estimates)	1979 (actual)	1980 (estimates)	1981 (estimates)	1979 (actual)	1980 (estimates)				
Sawn softwood	78.81	77.37	75.28	71.08	72.05	71.31	29.55	27.33	25.23	30.11a/	28.84a/	28.01a/
Coniferous logs	123.04	125.24	124.43	120.82	122.83	121.15	5.26	5.50	5.51	3.41	3.60	3.19
Sawn hardwood	22.36	22.10	21.71	19.02	18.68	18.85	6.67	6.43	5.95	3.22	3.13	3.18
- temperate zone							3.02*	2.79*	2.74*	2.98*	2.90*	2.99*
- tropical							3.65*	3.64*	3.21*	0.24*	0.23*	0.19*
Hardwood logs	41.75	42.03	41.64	35.41	35.56	35.65	8.59	8.93	8.31	2.39	2.44	2.31
- temperate zone							2.80	2.85*	2.60*	2.30*	2.35*	2.22*
- tropical							5.79*	6.08*	5.71*	0.09*	0.09*	0.09*
Particle board	24.25	24.27	24.59	24.26	24.88	24.43	4.96	4.52	4.57	5.01	5.12	5.01
Plywood	5.79	5.52	5.61	3.80	3.73	3.70	3.50	3.23	3.33	1.46	1.44	1.38
Fibreboard	4.51	4.66	4.66	4.48	4.62	4.57	1.36	1.38	1.41	1.33	1.28	1.29
Pulpwood	163.57	168.88	170.96	155.21	161.72	163.08	18.12	19.87	19.64	18.60a/	18.66a/	17.68a/
- roundwood, coniferous	76.21*	77.57*	..	70.01*	71.98*	..	8.43*	9.41*	..	5.14*	5.52*	..
- roundwood, broadleaved	42.56*	44.48*	..	41.42*	44.04*	..	6.49*	6.76*	..	4.95*	4.97*	..
- residues, chips and particles	44.80*	46.83*	..	43.78*	45.70*	..	3.20*	3.70*	..	2.53*	2.77*	..

a/ including USSR

ANNEX II

TIMBER COMMITTEE PROGRAMME OF WORK FOR 1981-1985

<u>Estima-</u>	<u>Estima-</u>
<u>ted dura-</u>	<u>ted ter-</u>
<u>tion (in</u>	<u>mination</u>
<u>years)</u>	<u>year</u>

WORK AREA 14.1: MEDIUM AND LONG-TERM TRENDS AND PERSPECTIVES

14.1.1. Review of projections made in study "European Timber Trends and Prospects, 1950 to 2000" in relation to actual developments

Description: The Committee will keep under review long-term trends in production, trade, consumption and prices of forest products, comparing them with projections made in the long-term study, both to check the accuracy of the analyses presented in the study and in order to provide early warning of changes in trends, thus enabling Governments to review their long-term forest policies in the light of recent developments.

Method of work: The Committee will compare, on a continuing basis, real trends with the projections of the long-term study, as an integral part of its analyses of specific aspects of the forest products sector (notably under projects 14.1.2., 14.1.3., 14.2.1.). In addition, the secretariat will prepare an overall study which will compare real trends up to 1980 with projections. One aspect to which this study should pay particular attention is the effects of developments in the energy sector on supply and demand of forest products. The team of specialists on wood/energy questions (see project 14.5.2.7.) will make recommendations to the Committee on how this objective may best be achieved.

cont.

14.1.2. Medium-term trends in the structure and capacity of the wood-processing industries

14.1.2.1. The wood-based panels industries

Description: The Committee will review the structure and capacity of the wood-based panels industries in order to enable Governments to form their own industrial policies for the wood-based panels sector in the light of information on international conditions.

Method of work: A team of specialists will submit to the Joint FAO/ECE Working Party on Forest Economics and Statistics in 1981 proposals as to the scope, orientation, methodology and periodicity of future surveys. The Working Party will prepare proposals on future action.

cont.

14.1.2.2. The sawmilling industry

Description: The Committee will review the structure and capacity of the sawmilling industry in order to enable Governments to form their policies for the sawmilling industry in the light of information on international conditions.

Method of work: The Committee will undertake surveys at six-yearly intervals (next survey in 1984). A team of specialists will be convened in 1981 to submit recommendations to the fortieth session of the Timber Committee on the scope of the survey in 1984 and how it should be prepared.

cont.

14.1.3. Medium-term trends in the markets for specific forest products

Description: The Committee will review medium-term (3-5 years) trends in the production, consumption, trade and prices of major forest products so that Governments may be continuously informed of structural trends in the forest products markets of the ECE region.

Method of work: The secretariat will prepare one study annually, on a three-year rotation of subjects, as follows: Sawnwood and sawlogs in 1981, 1984, etc.; pulpwood, wood for energy and miscellaneous roundwood in 1982, 1985, etc.; wood-based panels in 1983, 1986, etc. The secretariat will prepare at intervals as will be decided, a review of trends in roundwood production and supply.

cont.

14.1.4. Trends, prospects and policies in southern Europe

Description: The forest and forest industry policy and environmental problems facing countries in the Mediterranean area will be reviewed in the light of the long-term outlook for their forest economies, as depicted in European Timber Trends and Prospects, 1950 to 2000.

Method of work: The Committee will convene an ad hoc meeting in (year to be decided) on the production and marketing of products of specific interest to Mediterranean forestry, including cork and resin; and other such meetings, as the need is identified. All activities under this project will be carried out in co-operation with the FAO European Forestry Commission.

cont.

WORK AREA 14.2 : CURRENT MARKET DEVELOPMENTS AND SHORT-TERM PROSPECTS, INCLUDING PROBLEMS RELATING TO INTERNATIONAL TRADE

Estima- ted dura- tion (in years)	Estima- ted ter- mination year
--	---

14.2.1. Review of production, trade, consumption and prices of forest products

Description: The Committee will analyse on a continuous basis, short-term trends in the production, trade, consumption and prices of forest products and forecast short-term prospects, with a view to providing Governments and the forest products sector with accurate and up-to-date information and assessments, necessary for an orderly development of the supply/demand mechanism.

Method of work: The secretariat will prepare and publish annually a review of trends in forest products markets over the previous year, based on data supplied by Governments in connexion with project 14.5.1. The secretariat will present to the Committee's annual session the most recent available data on trends in the market for forest products, obtained from questionnaire returns, with a brief analysis of the situation. The Committee will review, at its annual session, short-term trends and prospects in the production, trade, consumption and prices of major forest products (sawn softwood, hardwoods, including tropical, pulpwood, coniferous logs and wood-based panels) on the basis of estimates prepared by delegations, for the current and following years. After the session, the secretariat will prepare and publish an analysis of short-term market trends and prospects, based on the Committee's discussions.

cont.

14.2.2. Rationalization of the flow of forest products from the forest to the consumer, including transport and handling problems

Description: The Committee will review the distribution chain for forest products from the forest to the consumer, including transport and handling problems, and identify areas where it might recommend any action which it considers necessary to rationalize the flow of products and to increase efficiency with a view to facilitating international trade.

Method of work: The Committee's coordinator on transport and handling problems will make recommendations to the Committee for work in this field, as and when appropriate.

cont.

14.2.3. Review of standardization activities

Description: The Committee will review regularly needs and priorities for standardization in the field of forest products as well as progress in its own standardization projects (14.2.4., 14.2.5., 14.2.6.). On the basis of this review, it will decide what activities it should undertake, with a view to facilitating international trade in forest products by removing non-tariff barriers, and to furthering the rational and economic use of wood.

Method of work: The Committee will base its annual review on a report, and if necessary, recommendations by its co-ordinator in the field of standardization. Co-operation will be maintained with ISO and its appropriate Technical Committees.

cont.

14.2.4. Standardization of stress grading of coniferous sawn timber

Description: The Committee will encourage the application of the ECE recommended standard by incorporation of its provisions into national standards, and undertake any further work necessary for the refinement of the recommended standard, with a view to ensuring the rational and economic use of, and to facilitating trade in, coniferous sawn timber.

Method of work: The Committee will convene a team of specialists to collect information and make proposals for research programmes, quality control programmes and marking systems for stress graded coniferous sawnwood. The team will, among other things, draft a set of guidelines for countries developing quality control programmes. The Committee will organize training courses to exchange experience on the application of the recommended standard and for the training of those responsible for sawnwood grading. An ad hoc meeting will be convened in 1981 to review and, if necessary, update the recommended standard. (Work to be linked to project 14.2.5.).

4 1982

14.2.5. Standardization of finger-jointing in structural coniferous sawn timber

Description: The Committee will encourage the application of the ECE recommended standard on finger-jointing in structural coniferous sawn timber, notably by incorporation of its provisions into national standards, and undertake any further work necessary for the refinement of the recommended standard, with a view to ensuring the rational and economic use of, and to facilitating trade in, structural finger-jointed coniferous sawn timber.

Method of work: The team of specialists (see project 14.2.4.) will collect information and make proposals about research programmes, quality control programmes and marking systems for finger-joints in structural coniferous sawnwood. The Committee will also organize seminars to exchange experience on the application of the recommended standard. An ad hoc meeting will be convened in 1981 to review and, if necessary, update the recommended standard. (Work to be linked to project 14.2.4.).

4 1982

14.2.6. Reduction of the number of standard dimensions of sawnwood entering international trade

Description: The Committee will formulate proposals for the reduction of the number of standard dimensions of sawnwood entering international trade, on the basis of ISO International Standard 3179 and in collaboration with ISO, with a view to facilitating international trade in sawnwood.

Method of work: The Committee will keep under review progress in the work being undertaken by other organizations, notably ISO, with a view to collaborating in such work as and when it considers it appropriate.

3 1981

Estima- Estima-
ted dura- ted ter-
tion (in mination
years) year

14.2.7. Classification and definitions of forest products

Description: The Joint FAO/ECE Working Party on Forest Economics and Statistics, in co-operation with the Conference of European Statisticians, will revise the FAO Classification and Definitions of Forest Products, with a view to ensuring that it is in harmony with international multi-sector classifications and definitions (e.g. the CCC Harmonized System, ICGS, SITC), developments in technology and in industrial and trade practice and the appearance of new products.

Method of work: An ad hoc meeting will be convened in 1981 to consider and incorporate proposals by countries and competent organizations for modifications to the FAO Classification and submit a draft revised version to the thirteenth session of the Joint Working Party. The Working Party at its thirteenth session will consider whether it would be appropriate for it to undertake work on harmonizing classifications and definitions relating to furniture.

2 1982

WORK AREA 14.3: SELECTED ECONOMIC, TECHNOLOGICAL AND MANAGERIAL PROBLEMS

14.3.1. Forest working techniques and training of forest workers

This project is covered by the activities of the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers, which normally meets biennially (1982, 1984, etc.). Its task is to foster international collaboration on technical, economic and organizational aspects of forest working techniques and training of forest workers in logging and other forest operations; special attention is given to increasing the efficiency of labour, the reduction of the physical efforts of the worker, prevention of accidents, reduction of waste and the establishment of an adequate balance between technical, social and economic requirements and protection of the environment.

The project components are set out below under three main headings:

1. Silvicultural operations and general management aspects;
2. Wood harvesting and transport; and
3. Human aspects of forest operations.

14.3.1.1. Silvicultural operations and general management aspects

14.3.1.1.1. Development and use of machinery and methods for stand establishment, including planting stock and equipment

Description: The Joint Committee will promote the exchange of information and further rational regeneration methods which do not damage the forest ecosystem by regularly reviewing machines, techniques and planting stock applied in afforestation and reforestation, with emphasis on site clearing, soil preparation and planting.

Method of work: Seminars and/or study tours will be organized at intervals. A seminar on machines and techniques in plant production will be held in 1983 in Czechoslovakia (subject to confirmation).

cont.

14.3.1.1.2. Forest fire prevention and control

Description: The Joint Committee will examine techniques and equipment used in forest fire control, as well as preventive measures, with a view to assisting Governments in these fields.

Method of work: A seminar will be held in Poland in 1981 and another in Portugal in 1985.

5 1985

14.3.1.1.3. Methods of measurement of labour productivity

Description: The Joint Committee will review methods of assessing productivity of man and machines, and methods of measurement of standard times whereby to determine the relationship between changes in labour input and machine input and assess the effects and implications of replacing labour by machines.

Method of work: A team of specialists will discuss methods of measuring machine input in forestry operations, and submit its report to the fourteenth session of the Joint Committee.

2 1982

14.3.1.1.4. Planning and management of forest operations

Description: The Joint Committee will study methods of planning forest operations, especially in the long term, taking into account the impact of environmental and social constraints on the planning and method of work; it will also examine methods of assessing technical and economic accessibility of forest resources, so as to assist Governments in the planning and rational utilization of the resource.

Method of work: Proposals will be formulated by the Steering Committee at its fourth session on 1-2 December 1980.

2 1982

<u>Estima-</u> <u>ted dura-</u> <u>tion (in</u> <u>years)</u>	<u>Estima-</u> <u>ted ter-</u> <u>mination</u> <u>year</u>
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14.3.1.1.5. Development of methods and equipment for silvicultural operations and multiple use forestry under Mediterranean conditions

Description: The Joint Committee will promote the exchange of information and further the development of methods and techniques applicable to silvicultural operations and multiple use forestry under the particular conditions found in countries in the Mediterranean area, with a view to assisting the countries concerned in these fields.

Method of work: (a) A team of specialists will draw up proposals, to be approved by the Steering Committee, on topics requiring priority attention and how to carry them out and the timetable, and will submit a progress report to the Joint Committee at its fourteenth session in 1982;

(b) A seminar will be held in 1984 in Turkey (subject to confirmation) on machines and techniques for the conversion of degraded and low productivity woodlands to productive forests.

cont.

14.3.1.1.6. Standardization activities in the field of forestry, including standardization of concepts and terms used by the Joint Committee

Description: The Joint Committee will keep under review standardization activities in the field of forestry, notably forest machinery with a view to assisting countries in the development and safety in use of equipment and methods; and will establish definitions of currently used technical and economic concepts and terms, in order to facilitate exchange of information during meetings and on other occasions.

Method of work: (a) The Joint Committee will review at each session, on the basis of a report which ISO should be invited to submit, standardization work being carried out, and will maintain active co-operation with the responsible ISO sub-committees and other bodies concerned with standardization;

(b) For each seminar convened by the Joint Committee, lists of basic concepts and terms, with definitions, will be prepared by the host country and issued in the three official languages with the assistance of the rapporteur, and will subsequently be completed and disseminated within the framework of the Joint Committee.

cont.

14.3.1.2. Wood harvesting and transport

14.3.1.2.1. Development and use of logging machinery

Description: The Joint Committee will keep under review trends and prospects in the development and use of logging machinery taking into account specific conditions and cost/price relationships so as to encourage rational logging methods in flat, hilly and mountainous regions from the economic, ergonomic and environmental points of view.

Method of work: Seminars on selected items will be held at intervals: in 1982 in the USSR, on integrated handling and transport of wood raw material in harvesting operations; in 1983 in the German Democratic Republic, on silvicultural, technological, economic and other problems connected with the mechanization of thinning operations; in 1985 in the USSR, on mechanization of logging operations in mountainous regions (subject to the decision by the Joint Committee at its fourteenth session)(see also 14.3.1.2.3.)

cont.

14.3.1.2.2. Maintenance of forest machinery

Description: The Joint Committee will promote the exchange of information on systems of maintenance of forest machinery, and further the rational use of such machines.

Method of work: A seminar on maintenance of forest machinery in large and small-scale operations will be held in 1981 in Sweden.

1 1981

14.3.1.2.3. Forest roads and transport of wood raw material

Description: The Joint Committee will promote the exchange of information on methods of construction of forest roads and on the transport by road or other means of wood raw material, with a view to assisting countries to rationalize their transport systems and reduce costs.

Method of work: A seminar and study tour will be held in Norway in 1982, in conjunction with the fourteenth session of the Joint Committee, on planning of internal and external transport in forestry and its combination with forest operational activities; a seminar will be held in 1984 or 1985 in Finland, on wood transport and road construction in swampy areas (subject to the decision by the Joint Committee at its fourteenth session)(see also 14.3.1.2.1.)

cont.

14.3.1.2.4. Terrain classification from the wood harvesting point of view

Description: The Joint Committee will review studies on terrain classification and forest accessibility, with a view to facilitating international comparisons on accessibility of forest resources.

Method of work: A team of specialists will prepare a draft of a primary, descriptive terrain classification, in collaboration with IUFRO and taking into account the work of the European Economic Community, and submit it to the fourteenth session of the Joint Committee in 1982, which will decide on further action.

2 1982

	Estima- ted dura- tion (in years)	Estima- ted ter- mination year
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14.3.1.2.5. Compatibility of harvesting methods and equipment with silviculture and the environment

Description: The Joint Committee will review harvesting methods and equipment and compare these with the methods applied in silviculture so as to determine compatibilities and incompatibilities, taking into account environmental aspects.

Method of work: A preliminary descriptive list of harvesting methods and equipment will be prepared by a team of specialists from the point of view of compatibility with silvicultural methods and the environment for submission to the Joint Committee at its fourteenth session in 1982, when further action will be decided.

2	1982
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14.3.1.2.6. Harvesting of wood for energy purposes

Description: The Joint Committee will review methods and equipment suitable for the production and harvesting of wood specifically destined for energy production, so as to determine the potential of the forest or special plantations to contribute economically to total energy supply.

Method of work: A review of developments, including the activities of other international organizations, such as the International Energy Agency, will be submitted by a team of specialists to the Joint Committee at its fourteenth session in 1982.

1	1982
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14.3.1.3. Human aspects of forest operations

14.3.1.3.1. General questions of vocational training in forestry

Description: The Joint Committee will assist Governments in planning their national vocational training policies by keeping under review developments and trends in vocational training in forestry to raise the efficiency of forest operations and improve working practices with regard to safety and health.

Method of work: (a) Seminars will be organized at intervals on selected problems: in 1982 in the United Kingdom on the selection and training of machine operators; in 1984, in ... ^{1/} on vocational training problems specific to southern Europe;

cont.

(b) A team of specialists will be established to follow up the recommendations of the seminar on vocational training and extension services for small-scale forest owners and farmers (held in 1980) and report to the fourteenth session of the Joint Committee in 1982;

2	1982
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(c) A report on vocational training systems in forestry will be prepared by ILO and submitted to the fourteenth session of the Joint Committee in 1982.

2	1982
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^{1/} Host country to be decided.

14.3.1.3.2. Specific problems of vocational training in forestry

Description: The Joint Committee will provide Governments with guidance in connexion with their services dealing with specific problems of vocational training.

Method of work: (a) A team of specialists will prepare a report on possibilities and methods of rehabilitating injured, disabled or older forest workers and submit it to the seminar in Canada, in 1981 on occupational safety and health and applied ergonomics in highly mechanized logging operations (see also 14.3.1.3.3(a)) and to the fourteenth session of the Joint Committee in 1982;

2	1982
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(b) A team of specialists will start work after the fourteenth session of the Joint Committee and submit a report on further training of professional forest workers to the fifteenth session of the Joint Committee in 1984.

2	1984
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14.3.1.3.3. General questions of applied ergonomics, safety and health in forest operations

Description: The Joint Committee will help Governments in their national health and employment planning by keeping under review developments and trends in ergonomics applied to forestry, occupational safety and health, with a view to promoting safer working habits, preventing occupational injuries and diseases, increasing work performance and forest workers' satisfaction with their jobs.

Method of work: (a) Seminars or training courses will be organized at intervals on a selected problem in the field of ergonomics applied to forestry: in 1981, in Canada, on occupational safety and health and applied ergonomics in highly mechanized logging operations; in 1983, in ... 1/ on occupational safety and health in forest work; in 1985, in ... 1/ on ergonomics in forest work;

cont.	
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(b) A team of specialists will start work in 1983 and submit a report on occupational health services in forestry to either the sixteenth session of the Joint Committee or another meeting (subject to the decision by the Joint Committee at its fifteenth session in 1984).

3	1986
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14.3.1.3.4. Specific problems of applied ergonomics, safety and health in forest operations

Description: The Joint Committee will study specific problems related to ergonomics, safety and health in forest operations with a view to improving working methods and recommending safety standards in various operations.

Method of work: A team of specialists will start work after the fourteenth session of the Joint Committee and submit a report on pesticides - health hazards and protection, to the fifteenth session of the Joint Committee in 1984.

2	1984
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1/ Host country to be decided.

Estima- Estima-
ted dura- ted ter-
tion (in mination
years) year

14.3.2. Utilization of tropical hardwoods

Description: The Committee will review the utilization of tropical hardwoods with a view to analysing patterns and trends in the demand for these products and to identifying opportunities for expanding trade with developing countries.

Method of work: Co-operation will be maintained with UNCTAD and FAO in their activities relating to markets for tropical timber.

cont.

14.3.3. Economic and technical developments in the furniture industry

Description: The Committee will further the exchange of information on economic and technical developments in the furniture industry, with a view to assessing in quantitative and qualitative terms the use of forest products in that industry and the trends and prospects in the demand for forest products for that sector.

Method of work: The Committee will decide on further work in this field at its thirty-ninth session, on the basis of the report of the symposium on economic and technical developments in the furniture industry and of proposals to be submitted by Governments.

1

1981

14.3.4. Modernization in the wood-based panels industries

Description: The Committee will further the exchange and dissemination of scientific, technological and economic information on modernization in the wood-based panels industries.

Method of work: The Committee will decide on further work in this field at its thirty-ninth session, on the basis of the report of the symposium on wood-based panels in the 1980s: economic and technical perspectives, and of proposals to be submitted by Governments.

1

1981

14.3.5. Review of progress made in the chemical processing of wood (other than for pulp and paper) and the potential of the use of wood for chemical products

Description: In conjunction with the Chemical Industries Committee, the Committee will keep under review, from the technical and economic point of view, progress made in the chemical processing of wood (other than for pulp and paper) with a view to improving the utilization of by-products of the wood processing industries, and to assessing potential demand from the chemical industry for wood raw material, as well as the effect any increase would have on the supply/demand balance for forest products in the ECE region and the availability of raw material for traditional wood-using industries.

Method of work: The Joint FAO/ECE Working Party on Forest Economics and Statistics at its thirteenth session will assess the relative importance of the use of wood in chemical processing and the potential significance of this use of wood for the forest products sector. The team of specialists on wood/energy questions will consider whether they should undertake any work in this field. The Committee will decide on future work at its thirty-ninth session, on the basis of the above.

1

1981

WORK AREA 14.4 : ENVIRONMENTAL AND RESOURCE CONSERVATION PROBLEMS

(All the Committee's activities in this work area will be carried out in co-operation with the Senior Advisers to ECE Governments on Environmental Problems.)

14.4.1. Quantification and evaluation of the environmental benefits of forests

Description: The Joint FAO/ECE Working Party on Forest Economics and Statistics will examine methods of quantifying and evaluating the environmental benefits of forests with a view to assessing forests' contribution to society, to calculating compensation for the environmental services of forests and to facilitating comparisons between countries.

Method of work: A draft enquiry on environmental and non-wood uses of forests will be finalized after being reviewed by countries at an ad hoc meeting in 1981. Countries will be invited to submit results of studies quantifying the benefits of non-wood uses of forests for consideration by the thirteenth session of the Working Party, which will make proposals for further work in this field. Project linked with project 14.5.2.3.

2 1981

14.4.2. Energy conservation and self-sufficiency in the mechanical wood-processing industries

Description: The Committee will encourage the exchange of information in this field, with a view to furthering the conservation of energy and, where appropriate, the increase of self-sufficiency in the mechanical wood-processing industries.

Method of work: A seminar on energy conservation and self-sufficiency in the sawmilling industry, will be held in 1982, in the Federal Republic of Germany (subject to confirmation). The Committee will decide on the basis of the results of the seminar whether further seminars should be organized.

2 1982

WORK AREA 14.5 : COLLECTION, EXCHANGE AND DISSEMINATION OF INFORMATION, INCLUDING IMPROVEMENT AND HARMONIZATION OF STATISTICS (IN CO-OPERATION WITH FAO)

14.5.1. Timber Bulletin for Europe

Description: The Committee will collect statistics on production, trade and prices of forest products, with a view to providing Governments and the forest products sector with data on the basis of which to formulate policies and make decisions.

Method of work: The secretariat will publish, twice a year, the Timber Bulletin for Europe, containing annual and quarterly statistics on production, trade and prices of forest products, collected from Governments by means of quarterly questionnaires; and will publish a supplement, four times a year, of monthly prices of forest products and related data.

cont.

Estima- ted dura- tion (in years)	Estima- ted ter- mination year
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14.5.2. Selected problems of economics and statistics of forestry and forest products

This project, together with projects 14.5.3., 14.5.4. and 14.5.5. (part), is carried out by the Joint FAO/ECE Working Party on Forest Economics and Statistics which normally meets biennially (1981, 1983, etc.). It co-operates with the Conference of European Statisticians.

14.5.2.1. Organization and periodicity of statistical data collection and dissemination

Description: The Working Party will review periodically the Committee's programme of collection and dissemination of statistical data, to ensure that it corresponds with the needs of Governments.

Method of work: Periodic reviews will be undertaken by the Working Party, which will formulate proposals for improving the Committee's programme of collection and dissemination of statistical data with regard to its organization, method of collection, periodicity, and the improvement of the accuracy and comparability of data obtained from and used by Governments. At its thirteenth session, the Working Party will examine the possibility of collecting data on stocks of forest products.

cont.

14.5.2.2. Conversion factors

Description: The Working Party will review the conversion factors for forest products applicable to individual countries, in order to facilitate international comparison of yields and to ensure that the conversion factors used by the secretariat in its analyses reflect current technology.

Method of work: The Working Party will review at four-yearly intervals (1981, 1985, etc.) conversion factors communicated by Governments in reply to a questionnaire.

cont.

14.5.2.3. Forest resource analysis

Description: The Working Party will review methods of forest inventory used by Governments and by the secretariat to ensure that all parameters relevant to measuring actual productive potential of the forest, as well as parameters measuring change, both for wood and non-wood benefits, are taken into account and that the methods adopted correspond as closely as possible to the needs of all users.

Method of work: Outlines of enquiries on forest resources for wood and fibre production and on environment and non-wood uses of forests (see project 14.4.1.) will be submitted to countries to ascertain the availability of data and the form in which they are available. Draft enquiries will be prepared on the basis of countries' replies, examined by an ad hoc meeting and submitted to the thirteenth session of the Working Party, before being finalized and despatched to countries.

14.5.2.4. Labour statistics

Description: The Working Party, in co-operation with the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers, will study labour input, average wage rates and earnings in forestry, with a view to providing more data on cost trends and a basis for comparison of employment and earnings.

Method of work: A team of specialists will review the possible orientation of future work on labour economics and statistics, on the basis of the report published in 1980 and report to the thirteenth session of the Working Party, which will make proposals on the direction of future work.

2	1981
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14.5.2.5. Utilization of forest products by end-use sectors

Description: The Working Party will collect information on the utilization of forest products by end-use sectors and undertake analyses of utilization trends and patterns which will be submitted to the Timber Committee to form part of its continuing analysis of medium- and long-term market developments, with a view to providing Governments with information necessary for the elaboration of their forest products utilization policies.

Method of work: End-use statistics will be collected periodically by means of enquiries and analyses carried out by the Working Party, which will consider at its thirteenth session appropriate directions for activities in this field and methods of work.

2	1983
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14.5.2.6. Forest fire statistics

Description: The Working Party will improve the exchange of information on forest fires, their causes and methods of prevention and protection and the costs involved.

Method of work: At its thirteenth session the Working Party will review the results of an enquiry and draw up proposals concerning the regular collection of statistics in this field.

2	1981
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14.5.2.7. Information base on the use of wood for energy

Description: The Working Party will review the information base for the use of wood for energy, with a view to providing governments with a more accurate and complete assessment of the present situation and recent trends. This review will cover levels and patterns of consumption and prices for conventional fuelwood, industrial residues synthetic fuels and other wood-derived energy.

Method of work: A report on this subject will be prepared by the secretariat and the team of specialists on wood/energy questions. The Working Party will make proposals at its thirteenth session in 1981, on the basis of this report, on the future direction of work in this area.

3	1983
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	Estima- ted dura- tion (in years)	Estima- ted ter- mination year
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14.5.3. Studies of selected economic problems

14.5.3.1. Economic aspects of the fuller use of the forest biomass

Description: The Working Party will study the economic aspects of the fuller use of the forest biomass with a view to determining the potential for the forest resource to meet the demand for raw material from the different wood-using industries and consumption sectors.

Method of work: A team of specialists will collect and review information in this field and present a report to the thirteenth session of the Working Party.

2	1981
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14.5.3.2. Economic aspects of afforestation and reforestation

Description: The Working Party will study the economic aspects of afforestation and reforestation with the object of comparing the efficiency of different methods and the relative costs and returns in different countries under different conditions.

Method of work: Taking account of the relevant work of the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers and collaborating where appropriate (see project 14.3.1.1.1.), a team of specialists will collect and review information on the economics of afforestation and reforestation and present a report to the fourteenth session of the Working Party.

2	1983
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14.5.3.3. Economic aspects of the introduction of new forest machines and equipment

Description: The Working Party will study the economic aspects of the introduction of new forest machines and equipment with the object of assessing their productivity and return on investment in different countries and under different operating conditions.

Method of work: Taking account of the relevant work of the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers and collaborating where appropriate (see project 14.3.1.2.1.), a team of specialists will collect and review information on the economics of introducing new machines and equipment into forestry and report to the thirteenth session of the Working Party.

2	1981
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14.5.4. Transfer of economic and statistical methods and experience in the forest and forest products sector

Description: The Working Party will contribute to the building up of statistical services in countries inside and outside the ECE region through the transfer of know-how and experience in methods of data collection, assembly and dissemination in the forest and forest products sector.

Method of work: A team of specialists will draw up proposals for the consideration of the Working Party's thirteenth session.

2	1981
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14.5.5. Dissemination and exchange of general information and experience

Description: The Committee will further the dissemination and exchange of information and experience on selected themes within its area of competence, by dissemination of statistical and other information on countries' forestry and forest products sector, and by organizing annual study tours at the invitation of the countries concerned with a view to making available to Governments and the forest products sector experience gained in individual countries.

Method of work: A study tour will be held in the United States in 1981 and in Czechoslovakia in 1982.^{1/} Country forest and forest products profiles will be prepared by the secretariat, in collaboration with the Governments of countries concerned, and published at five- to six-yearly intervals. A Yearbook describing briefly the Committee's activities over the past year will be issued annually.

cont.

^{1/} Host countries to be decided for the years from 1983 to 1985 inclusive.

Annex III

Tabular presentation of Timber Committee programme of work 1981-1985

Project number	Project	1981	1982	1983	1984	1985
WORK AREA 14.1 : MEDIUM AND LONG-TERM TRENDS AND PERSPECTIVES						
14.1.1.	Review of projections made in study <u>European Timber Trends and Prospects, 1950-2000</u> in relation to actual developments		Continuous (cf. projects 14.1.2., 14.1.3., 14.2.1.,)	Study of trends to 1980		
14.1.2.	Medium-term trends in the structure and capacity of wood-processing industries	Team of specialists on sawmilling industry to be convened Review of scope etc. of enquiry for wood-based panels industries by FAO/ECE Working Party, on basis of proposals by team of specialists		Wood-based panels industries (as determined by Committee)	Sawmilling industry	
14.1.3.	Medium-term trends in the markets for specific forest products	Sawnwood and sawlogs	Pulpwood, wood for energy and miscellaneous roundwood	Wood-based panels	Sawnwood and sawlogs	Pulpwood, wood for energy and miscellaneous roundwood
14.1.4.	Trends, prospects and policies in southern Europe	Ad hoc meeting on the production and marketing of products of specific interest to Mediterranean forestry (Year and host country to be decided)				
WORK AREA 14.2 : CURRENT MARKET DEVELOPMENTS AND SHORT-TERM PROSPECTS, INCLUDING PROBLEMS RELATING TO INTERNATIONAL TRADE						
14.2.1.	Review of production, trade, consumption and prices of forest products	Continuous				
14.2.2.	Rationalization of the flow of forest products from the forest to the consumer, including transport and handling problems	As decided by Committee on recommendations of co-ordinator				
14.2.3.	Review of standardization activities	Continuous, at annual session				

Tabular presentation of Timber Committee programme of work 1981-1985

Project number	Project	1981	1982	1983	1984	1985
14.2.4.	Standardization of stress grading of coniferous sawn timber	Team of specialists on research, quality control and marking <u>Ad hoc meeting</u>				
14.2.5.	Standardization of finger-jointing in structural coniferous sawn timber	Team of specialists on research, quality control and marking <u>Ad hoc meeting</u>				
14.2.6.	Reduction of the number of standard dimensions of sawnwood entering international trade	Committee to keep under review				
14.2.7.	Classification and definitions of forest products	<u>Ad hoc meeting</u>				
<u>WORK AREA 14.3 : SELECTED ECONOMIC, TECHNOLOGICAL AND MANAGERIAL PROBLEMS</u>						
14.3.1.	Joint Committee on Forest Working Techniques and Training of Forest Workers		Fourteenth session in Norway		Fifteenth session in Turkey (subject to confirmation)	
14.3.1.1.	Silvicultural operations and <u>general management aspects</u>			Seminar in Czechoslovakia on machines and techniques in plant production (subject to confirmation)		
14.3.1.1.1.	Development and use of machinery and methods for stand establishment, including planting stock and equipment					
14.3.1.1.2.	Forest fire prevention and control	Seminar in Poland				Seminar in Portugal
14.3.1.1.3.	Methods of measurement of labour productivity	- Report to Joint Committee by team of specialists				

Tabular presentation of the Timber Committee programme of work 1981-1985

Project number	Project	1981	1982	1983	1984	1985
14.3.1.1.4.	Planning and management of forest operations ^{1/}					
14.3.1.1.5.	Development of methods and equipment for silvicultural operations and multiple use forestry under Mediterranean conditions	Progress report to Joint Committee by team of specialists	Review by Joint Committee		Seminar in Turkey on machines and techniques for the conversion of degraded and low-productivity woodlands to productive forest (subject to confirmation)	
14.3.1.1.6.	Standardization activities in the field of forestry, including standardization of concepts and terms used by the Joint Committee		Review by Joint Committee		Review by Joint Committee	
14.3.1.2.	<u>Wood harvesting and transport</u>					
14.3.1.2.1	Development and use of logging machinery		Seminar in USSR on integrated handling and preparation of wood raw material in harvesting operations	Seminar in German Democratic Republic on silvicultural, technological, economic and other problems connected with the mechanization of thinning operations		Seminar in USSR on mechanization of logging operations in mountainous regions (subject to decision by Joint Committee in 1982)
14.3.1.2.2.	Maintenance of forest machinery	Seminar in Sweden on the maintenance of forest machinery in large and small scale forest operations				
14.3.1.2.3.	Forest roads and transport of wood raw material		Seminar in Norway on planning of internal and external transport in forestry and its combination with forest operational activities			Seminar in Finland on wood transport and road construction in swampy areas (subject to decision by Joint Committee in 1982)

^{1/} Proposals to be formulated by the Steering Committee at its fourth session (1-2 December 1980).

Tabular presentation of Timber Committee programme of work 1981-1985

Project number	Project	1981	1982	1983	1984	1985
14.3.1.2.4.	Terrain classification from the wood harvesting point of view	Report to Joint Committee by team of specialists	Report to Joint Committee by team of specialists			
14.3.1.2.5.	Compatibility of harvesting methods and equipment with silviculture and the environment	Report to Joint Committee by team of specialists	Report to Joint Committee by team of specialists			
14.3.1.2.6.	Harvesting of wood for energy	Report to Joint Committee by team of specialists	Report to Joint Committee by team of specialists			
14.3.1.3.	<u>Human aspects of forest operations</u>		(a) Seminar in United Kingdom on the selection and training of machine operators		Seminar in ^{1/} on vocational training problems specific to southern Europe	
14.3.1.3.1.	General questions of vocational training in forestry	(b) Report to Joint Committee by team of specialists on follow-up of recommendations of Seminar on vocational training and extension services for small-scale forest owners and farmers				
14.3.1.3.2.	Specific problems of vocational training in forestry	(c) Report to Joint Committee by ILO on vocational training systems	Report to Joint Committee by team of specialists on rehabilitation of injured, disabled and older forest workers	Report to Joint Committee by team of specialists on further training of professional forest workers		
14.3.1.3.3.	General questions of applied ergonomics, safety and health in forest operations	Seminar in Canada on occupational safety and health and applied ergonomics in highly mechanized logging operations		Seminar in ^{1/} on occupational safety and health in forest work		Seminar in ^{1/} on ergonomics in forest work

^{1/} Host country to be decided.

Tabular presentation of Timber Committee programme of work 1981-1985

Project number	Project	1981	1982	1983	1984	1985
14.3.1.3.4.	Specific problems of applied ergonomics, safety and health in forest operations					
14.3.2.	Utilization of tropical hardwoods	Review in cooperation with UNCTAD and FAO				
14.3.3.	Economic and technical developments in the furniture industry	To be decided at thirty-ninth session				
14.3.4.	Modernization in the wood-based panels industries	To be decided at thirty-ninth session				
14.3.5.	Review of progress made in the chemical processing of wood (other than for pulp and paper) and the potential of the use of wood for chemical products	To be decided at thirty-ninth session, on basis of recommendations by FAO/ECE Working Party				
<u>WORK AREA 14.4 : ENVIRONMENTAL AND RESOURCE CONSERVATION PROBLEMS</u>						
14.4.1.	Quantification and evaluation of the environmental benefits of forests	(Work to be linked with project 14.5.2.3.)				
14.4.2.	Energy conservation and self-sufficiency in the mechanical wood-processing industries		Seminar on energy conservation and self-sufficiency in the saw-milling industry, in the Federal Republic of Germany (subject to confirmation)			
<u>WORK AREA 14.5 : COLLECTION, EXCHANGE AND DISSEMINATION OF INFORMATION, INCLUDING IMPROVEMENT AND HARMONIZATION OF STATISTICS</u>						
14.5.1.	Timber Bulletin for Europe	Continuous (publication twice yearly of Bulletin and four times yearly of price supplement)				

Tabular presentation of Timber Committee programme of work 1981-1985

Project number	Project	1981	1982	1983	1984	1985
14.5.2.	Selected problems of economics and statistics of forestry and forest products (activities of the Joint FAO/ECE Working Party on Forest Economics and Statistics)	Thirteenth session of Joint Working Party		Fourteenth session of Joint Working Party		Fifteenth session of Joint Working Party
14.5.2.1.	Organization and periodicity of statistical data collection and dissemination	Continuous. Review at regular session of Joint Working Party Review of data on stocks at thirteenth session				
14.5.2.2.	Conversion factors	Review at thirteenth session				Review at fifteenth session
14.5.2.3.	Forest resource analysis	Circulation of enquiries after examination by <u>ad hoc</u> meeting and approval of Working Party				
14.5.2.4.	Labour statistics	Review at thirteenth session on basis of recommendation by team of specialists				
14.5.2.5.	Utilization of forest products by end-use sectors	Review at thirteenth session				
14.5.2.6.	Forest fire statistics	Review at thirteenth session on basis of enquiry				
14.5.2.7.	Information base on the use of wood for energy	Review at thirteenth session, on basis of report by secretariat and team of specialists				

Tabular presentation of Timber Committee programme of work 1981-1985

Project number	Project	1981	1982	1983	1984	1985
14.5.3.	Studies of selected economic problems					
14.5.3.1.	Economic aspects of the fuller use of the forest biomass	Report to Joint Working Party by team of specialists		Report to Joint Working Party by team of specialists		
14.5.3.2.	Economic aspects of afforestation and reforestation	Report to Joint Working Party by team of specialists				
14.5.3.3.	Economic aspects of the introduction of new forest machines and equipment	Decision by thirteenth session on basis of report of team of specialists				
14.5.4.	Transfer of economic and statistical methods and experience in the forest and forest products sector	Study tour in USA	Study tour in Czechoslovakia	Study tour in <u>1/</u>	Study tour in <u>1/</u>	Study tour in <u>1/</u>
14.5.5.	Dissemination and exchange of general information and experience	Preparation of country forest and forest products profiles (continuous) Publication of Yearbook (annual)				

1/ Host country to be decided.