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TIMBER COMMITTEE

REPORT OF THE FORTIETH SESSION

held at Geneva from 11 to 15 October 1982

As approved by the Committee

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Introduction

1. The Timber Committee held its fortieth session at Geneva from 11 to 15 October 1982. The session was attended by representatives from the following ECE countries: Austria; Belgium; Bulgaria; Byelorussian Soviet Socialist Republic; Canada; Czechoslovakia; Denmark; Finland; France; German Democratic Republic; Germany, Federal Republic of; Greece; Hungary; Ireland; Italy; Luxembourg; 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 United Nations and specialized agencies were represented: United Nations Conference on Trade and Development (UNCTAD); United Nations Industrial Development Organization (UNIDO); International Labour Organization (ILO); Food and Agriculture Organization of the United Nations (FAO).

3. The following intergovernmental organization participated: the European Economic Community (EEC).

4. The following non-governmental organizations were represented: European Confederation of Agriculture (CEA); European Confederation of Woodworking Industries (CEI-BOIS); Fédération européenne des Industries de contreplaqué (FEIC); International Confederation of Free Trade Unions (ICFTU); International Organization for Standardization (ISO); International Technical Association for Tropical Timber (ATIBT); International Union for Conservation of Nature and Natural Resources (IUCN); Organization of European Sawmilling Industries (OES); World Wildlife Fund (WWF).

5. The Committee paid homage to the memory of Mr. Oldrich Mysik, past Chairman of the Timber Committee and for many years a delegate of Czechoslovakia.

Adoption of the Agenda (Item 1 of the Agenda)

6. The provisional agenda (ECE/TIM/20), presented by the secretariat, was adopted.

Election of officers (Item 2 of the Agenda)

7. The Committee elected Mr. A. Froncillo (Italy) Chairman.

8. The Committee supported the proposal of the USSR delegation to conform with the practice in other ECE bodies of having one Vice-Chairman. It re-elected Mr. E. Nowicki (Poland) as Vice-Chairman.

9. The Committee expressed its deep appreciation to Mr. D. Hair (United States of America) for his notable contribution to its work during his term of office as Chairman.

Matters arising out of the thirty-seventh session of the Commission (Item 3 of the Agenda)

10. The Committee was informed of the Commission's discussion of its work. Attention was drawn to the resolutions and decisions of the Commission, on the basis of TIM/R.75. The Committee agreed to take account of these discussions, resolutions and decisions, particularly with regard to its programme of work.

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

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

11. The Committee was informed about the twentieth session of the FAO European Forestry Commission, held in Innsbruck (Austria) in March 1982. Special attention had been given during the session to progress in formulating policies relating to the use of wood for energy, institutional and economic implications of the size of forest holdings on their management, the impact of tourism and recreation on regional planning for forestry and the status of the Committee on Mediterranean Forestry Questions - "Silva Mediterranea". The Commission had decided to undertake an investigation on the impact of air pollution on forests and to study the implications for forest management and planning of new developments in remote sensing and other survey technology, taking account of work already being carried out by other bodies.
12. The representative of FAO also informed the Committee of the results of other meetings which had been held recently. These included: the second UNEP/FAO/UNESCO meeting of experts on tropical forests which directed attention to monitoring the development of tropical forests; a meeting of the FAO Committee on Forestry which had discussed, among other things, the effects of atmospheric pollution on forests and the transfer of technology; a meeting of the FAO Advisory Committee of Experts on Pulp and Paper, at which a decision was taken to start work on a long-term outlook study for the sector; in addition, the representative of FAO announced a consultation on the wood-based panels industry for Asia and the Pacific region, to be held in 1983 in New Delhi.
13. The representative of the ILO informed the Committee that the third Tripartite Technical Meeting on the Timber Industry was held in Geneva from 1 to 10 December 1981. Three reports were issued to serve as a basis for discussion. The general report reviewed the status of the timber industry. The second report concentrated on occupational safety and health problems, while the third dealt with the promotion of employment and vocational training, especially in developing countries. The representative also brought to the Committee's attention the fact that the Governing Body of the ILO had decided to establish a standing (permanent) Committee on the Forestry and Woodworking Industries. This permanent Committee will deal with the activities which have in the past been covered by ad hoc meetings held separately for the timber industry (forestry) in the woodworking industries. Its terms of reference will be broadened to include silvicultural activities which up to now had not been covered.
14. The representative of UNCTAD informed the Committee of developments in the field of tropical timber within the framework of the Integrated Programme for Commodities and of progress on the four elements of an international agreement on tropical timber identified by the Fourth Preparatory Meeting, viz. research and development, improvement of market intelligence, further and increased processing in developing countries, and reforestation and forest management. These have been approved as a package for forming the basis for negotiating an International Tropical Timber Agreement. A negotiating conference may be convened early next year, preceded by a meeting from 29 November to 3 December 1982 on institutional issues such as the structure and financing of the International Tropical Timber Organization.
15. The Committee was also informed of the activities of UNIDO, whose representative confirmed that the first consultation on the Wood and Wood Products Industry will be held from 19 to 23 September 1983 in Helsinki. Three regional preparatory meetings have taken place for Asia, Africa and the Americas, respectively. The results of these meetings will be discussed at a Global Preparatory Meeting in Vienna at the end of January 1983.

16. The representative of EEC informed the Committee of the Community's activities in the field of forestry, which were concentrated on forest development (notably for Mediterranean forests and in the context of regional development programmes and research (e.g. on tree diseases, as well as on means to make the best use of wood raw material)).
17. The Committee was informed that a seminar would be held in Nancy (France) from 20 to 23 April 1983 on the relations between agriculture and forestry, under the auspices of the European Association of Agricultural Economists.
18. The representative of CEA informed the Committee of the results of CEA's recent session in Copenhagen, notably the organization's concern to mobilize resources and encourage investment in the forestry industry. The problem of high capital taxation was stressed as well as environmental, economic and social questions which affect farmers involved in forestry.
19. The representative of ICFTU focussed his remarks on the activities of the International Federation of Building and Woodworkers (IFBWW). Unemployment, the conservation and proper management of forests, and the health and safety of forest workers are the chief concerns of this organization at the present time.

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

20. The Committee was informed of the results of the fourteenth session of the Joint Committee, held in Sandefjord from 22 to 25 June 1982 at the invitation of the Government of Norway. It approved the Joint Committee's report, including its programme of work (TIM/EFC/WP.1/12). The Timber Committee was also informed of the study tour in Norway and the seminar on the planning and techniques of transport and its relation to forest operational activities which preceded the session (report: TIM/EFC/WP.1/SEM.14/1). It warmly thanked the Government of Norway for the excellent organization of the session as well as for a most interesting seminar and study tour.

21. The Timber Committee was further informed of the results of the seminar on the management of forest worker training, held in May 1982 at Dumfries (report: TIM/EFC/WP.1/SEM.13/2) and warmly thanked the Government of the United Kingdom for organizing the seminar. The Committee also took note of the following seminars which will be held in 1982 and 1983 under the auspices of the Joint Committee:

- Seminar on reducing forest biomass losses in logging operations (Moscow, 4-11 December 1982); in this connexion, the Committee urged countries which had not yet done so to send in their country reports in order that the necessary documentation for the seminar might be completed.
- Seminar on machines and techniques for forest plant production (Smokovec, High Tatras (Czechoslovakia), 20-25 June 1983).
- Seminar on silvicultural, technological, economic and other problems connected with the mechanization of thinning operations (German Democratic Republic, 12-16 September 1983).

22. The Timber Committee noted with appreciation that several seminars were, or would be, held in collaboration with the International Union of Forestry Research Organizations (IUFRO). This was also the case of another seminar on ergonomics applied to forestry, to be organized by the Government of Austria in October 1983 in collaboration with the Joint Committee.

23. The Timber Committee was also informed that, at the invitation of the Government of Turkey, the fifteenth session of the Joint Committee would be held in that country in 1984, as well as a study tour and a seminar on machines and techniques for the conversion of low-productivity woodlands into productive forests.

24. The USSR delegation suggested that, in accordance with the new nomenclature of forestry terms adopted in his country, "lesorazrabotki" in the Russian title of the Joint Committee should be changed to "lesozagotovki" (this change affected neither the English nor the French versions). The Committee invited the Joint Committee to advise its parent bodies on this suggestion.

Market trends and prospects (Item 6 of the Agenda)

(a) Developments in 1982 and prospects for 1983

25. The Committee heard a brief statement from each delegation on recent developments in its country's economy and main forest products markets, which supplemented the written country statements. The Committee took note, during the discussions, of the Annual Forest Products Market Review (Supplement 1 to Volume XXXV of the Timber Bulletin for Europe), prepared by the secretariat, and of the brief comments by the secretariat on more recent developments in TIM/R.76. It drew up tables of countries' estimates for 1982 and 1983 of domestic requirements, production, imports and exports of sawn softwood, coniferous logs, hardwood logs and sawnwood (temperate-zone and tropical), particle board, plywood, fibreboard and pulpwood. A summary table is presented in Annex I.

General introduction

26. The year 1982 has been the most difficult for the forest products market in Europe and North America for several decades. Demand for sawnwood and wood-based panels continued the decline which had begun in 1979 in North America and somewhat later in Europe. That for pulp and paper, which had been relatively well sustained in both regions in 1981, weakened in 1982.

27. Among major factors contributing to the depressed state of the forest products markets has been the absence of growth in the economies of many countries and of only slow growth in the remainder. Gross Domestic Product (GDP) will be lower in 1982 than in 1981 in North America; it will be only slightly higher in western Europe. In the USSR and eastern Europe, output has continued to grow in 1982, apart from Poland where it has declined, but the rates of growth are lower than in 1981.

28. At its session in October 1981, the Committee had felt that the trough of the world economic recession had been reached in the autumn of 1981. It became increasingly apparent in the months that followed, however, that the economic upturn foreseen by many countries was being further delayed. This situation has to be seen in the context of the policies pursued by countries in western Europe and North America to reverse the rise of inflation rates during the 1970s, reduce public sector spending and improve trade balances. Monetary measures, notably the application of high interest rates, were maintained as the principal tool. These resulted in a considerable reduction in construction in general and new dwelling construction in particular. Unemployment levels which are very high and still rising, falling disposable incomes and an increasing number of business failures have been among the tangible results of the recession in many countries.

1/ The delegation of the Federal Republic of Germany stated that forecasts concerning the Federal Republic of Germany are estimated figures based on data supplied by scientific institutes and associations.

29. The absence in the economies of western Europe and North America of a sustained recovery has caused uncertainty about future prospects to persist and sapped business and consumer confidence. Consequently, the marked decline in interest rates and strong stock market rallies in several countries recently are being treated with caution as indicators of a coming revival of business activity. Nevertheless, several countries can point to substantial progress in reducing rates of inflation and budget deficits. Governments are also actively seeking ways of reducing unemployment and providing selective stimuli to industry which will not conflict with their existing economic policies.

30. The Committee noted that some profound structural changes were taking place in the forest products sector and that the process was being hastened by the currently difficult economic and financial conditions and their prolonged duration. These changes should be monitored to ensure that they resulted in an industry sector that would be viable under the competitive market conditions likely to persist in the 1980s.

31. The Committee stressed the essential link between the sawnwood and wood-based panels sector and the construction sector and ancillary activities, notably furniture manufacture. It noted that in some countries, including the United States, where there was an unfulfilled demographic need, latent demand for housing was considerably above current levels of new building; in others, slower growth of population and incomes and other factors probably meant a relatively stable housing demand in the years to come. More detailed analysis of this complex market was needed to determine appropriate strategies for the forest products industries, but amongst possible strategies were further diversification into alternative markets such as remodelling and renovation, and product specialization. There was a need for continued active promotion of timber-framed construction, which was especially suited to the building of smaller units, as well as of secondary homes and special types of construction, for example in earthquake zones.

32. With regard to the outlook for 1983, the Committee took note of the forecast of growth in GDP in the United States of over 3 %, which would be reflected in a recovery in demand for forest products. Some improvement was also foreseen in the United Kingdom. In many other countries, prospects remained uncertain, which was reflected in the generally cautious approach to making forecasts for forest products and the differences in expected trends among member countries. Until clearer signals of economic recovery could be seen, the forest products market would most likely continue to enter into forward commitments with considerable caution.

Sawn softwood and coniferous logs

33. Consumption of sawn softwood in 1981 in the United States amounted to 71 million m³, some 26 million m³ or 27 % less than the all-time peak in 1979. In Europe (excluding the USSR), consumption in 1981 reached 74 million m³, 6 million m³, or 9 % less than the 1979 and 1980 levels. For both the United States and Europe, further decreases in domestic requirements are forecast by the Timber Committee in 1982, but the falls are less marked than in 1981, amounting to 4.6 million m³ to 66.4 million m³ and 2.3 million m³ to 71.4 million m³ respectively. In Europe, some countries forecast increases in requirements, including the United Kingdom, France, Romania and Spain, but the majority expects a decrease, notably the Federal Republic of Germany, Italy and Poland.

34. Europe's sawn softwood production in 1982 is forecast to amount to 66.0 million m³, showing a somewhat larger fall (2.8 million m³) than consumption and reflecting the steps taken by producers to bring supply into better balance with demand. Output in Austria and Finland combined is expected to be 1.8 million m³ lower than in 1981. On the other hand, Swedish production may be slightly above the 1981 level. Canada's production is forecast to drop by 5.2 million m³ (13 %) in 1982, in response to lower demand domestically as well as in its main export markets.

35. After declining substantially in 1981, European imports of sawn softwood are expected to recover by over 600,000 m³ in 1982 to 24.4 million m³. The most notable change is the 1 million m³ increase foreseen by the United Kingdom. Against this, the Federal Republic of Germany and Italy expect a combined fall of over 800,000 m³. European and USSR exports may be little changed in total compared with 1981; the marked recovery forecast in Swedish shipments offsets decreases elsewhere, notably Finland, Austria and Romania.

36. For 1983, the forecasts are for a small rise in domestic requirements, of 900,000 m³ to 72.3 million m³; slightly larger increases in production to 67.1 million m³ and in imports to 25.4 million m³; but one of less than 700,000 m³ in exports (including those of the USSR) to 27.2 million m³.

37. The fact that most countries are forecasting only small changes in requirements, production and trade between 1982 and 1983 reflects the cautious attitude towards next year's market and expectations of only modest changes in economic activity. This also appeared to apply to markets outside the ECE region, for instance, North Africa and West Asia.

38. Both the United States and Canada forecast partial recoveries in domestic requirements in 1983, which in aggregate amount to 7.5 million m³ (10 %) to reach nearly 84 million m³. Production and intra-regional trade are expected to grow in line with the upturn in demand.

39. For coniferous logs, production and domestic requirements in 1982 and 1983 are forecast to follow the trend of sawn softwood production, that is to say a fall in 1982 followed by a recovery to somewhat below the 1981 level in 1983. In trade, the main change to be forecast is the upturn in both 1982 and 1983 in exports from the United States, whose main customer is Japan and which also foresees increased shipments to China.

40. In the course of the discussion, a number of points were raised. The 16 % devaluation of the Swedish krona on 8 October, as part of the new Government's measures to prime the economy, together with the devaluations of the Finnish markka could be considered as a threat to the stability of the market. In this connexion, the Swedish and Finnish delegations announced that producers in their countries intended to maintain offers at unchanged price levels in terms of customer countries' currencies. These delegations, along with the delegations of some other European countries, expressed the view that if other segments of the trading community also acted in a way that would help to maintain stability in purchasing for the current year, this would provide a basis for the sound development of the forward market for 1983.

41. In the northern European and North American markets, stocks of both logs and sawnwood at all stages of the supply chain have been kept to a minimum, because of the impact of high interest rates on stock-holding. Until firmer indications appeared of an improvement in demand, most buying was likely to remain on a hand-to-mouth basis. The recent trend towards lower interest rates, however, could be taken as an opportunity for some replenishment of stocks.

42. Some countries are investigating the factors influencing the supply of raw material to the sawmilling industry, and in Sweden and some other countries measures are being considered to stimulate the supply from the forest. In response to concern expressed about doing so in poor market conditions such as at present, it was pointed out that the introduction of such measures was likely to be a long process.

43. In order to be able to perform their functions properly, all parties concerned must obtain an adequate rate of return on their operations, which has not been the case in many countries during the prolonged recession. The problem of poor profitability has been common to all sections of the supply chain which have been squeezed between rising costs and weak prices, both at the producer and resale levels.

Hardwoods

44. European consumption of sawn hardwood is forecast to continue to fall in 1982, but the drop of less than 0.6 million m³ (3 %) is only half as much as that recorded in 1981. The expected fall in 1982 results from drops in production of over 0.3 million m³ and in imports of 0.2 million m³. European imports of sawn hardwood in 1982, at 4.8 million m³, would thus be nearly 2 million m³ lower than in 1979, the peak level they had reached to date.

45. Most countries in Europe expect lower imports in 1982 but France forecasts an increase of nearly 0.2 million m³, the larger part being of tropical species. European imports of sawn hardwood from North America are expected to be lower due partly to the appreciation of the United States currency. This latter factor was also affecting trade in tropical sawn hardwood traded in this currency or ones linked to it.

46. Stocks of tropical sawn hardwood were reported to be small at all levels of the chain, and many mills in the exporting countries closed down. The unsettled state of the market was reflected in the price movements which even small changes in demand could cause.

47. Demand for sawn hardwood like that for other forest products has been affected by the prevailing conditions in major markets, the furniture and joinery industries. In addition, markets for lower qualities in a number of countries have been under the influence of reduced demand for sleepers from railways. This has caused producers to explore and develop new markets for such qualities.

48. European producers' stocks of sawn hardwood in particular of oak, were said to be high in the first half of 1982, and prices, especially of average and lower qualities were under pressure. High qualities, however, were generally firm, and in some countries were reported to have risen further after a period of stagnation in 1981.

49. In the United States, consumption of sawn hardwood, which had already declined appreciably in 1981 is expected to show a further marked fall in 1982 of 3.6 million m³, or 23 %.

50. A similar drop is expected for production in 1982, to 12.3 million m³, and trade is also forecast to be sharply lower.

51. For 1983, the Committee expects an over-all improvement in the sawn hardwood markets in North America and Europe, but the expected rise in requirements and production will generally not bring volumes back to the level of 1981. Only a few countries in Europe forecast requirements of sawn hardwood to decline further in 1983, but several expect no increase or only a marginal one.

52. Hardwood log requirements in Europe are forecast to decline marginally in 1982, by 0.2 million m³ or less than 1 % to 39.3 million m³, and production to increase slightly to 34.4 million m³. While the majority of European countries expect a somewhat lower production, Finland is the main exception, with a forecast increase of 0.35 million m³ or 23 %. Europe's imports and exports are also forecast to be lower in 1982, by 4 and 8 % respectively.

53. Forest sales had been characterized by a cautious attitude on the part of buyers in 1981, and prices dropped for many assortments. For 1982, several countries reported firmer demand. Prices for good qualities, especially of oak, rose quite markedly in some cases, as did also those for certain species of limited availability, such as those used in cabinet making.

54. Attention was drawn to developments in the tropical hardwood log sector which were likely in the medium and longer-term to result in changes in trade and market structures. Among these were, for instance, the emergence of China as a purchaser of tropical hardwood logs, the export of logs from west African countries to east Asian markets, and the expansion of the processing industry in exporting countries.

55. For 1983, the Committee expects an increase in European hardwood log requirements of nearly 0.8 million m³ or 2 %, and a further rise in production of 0.6 million m³ to nearly 35 million m³. A small rise is also foreseen for exports but imports are expected to decline further to 7.1 million m³, mainly due to sharply reduced imports by Portugal.

Wood-based panels

56. Demand for wood-based panels in North America and Europe is expected to decline further in 1982, after successive falls in 1980 and 1981. For 1983, a reversal of this trend is forecast, sharper in North America but more contained in Europe, under the influence of an expected improvement in major wood-using sectors, in particular residential construction, and a rise in activity in the furniture and fixtures industries. This trend could already be observed in the United States.

57. Domestic requirements of plywood in the United States are forecast to be 14.8 million m³ in 1982, 0.7 million m³ lower than in 1981, and the lowest level for some time. Production in the United States is expected to fall by 0.5 million m³ to 14.3 million m³. Lower requirements and production are also forecast for particle board and fibreboard.

58. For 1983, domestic requirements for plywood in the United States are forecast to rise by 1.5 million m³ or 10 % to 16.3 million m³, and production by 1.3 million m³ or 9 % to 15.6 million m³, still a low level by historical standards. Even larger increases, in percentage terms, are expected for domestic requirements and production of particle board and fibreboard.

59. In anticipation of an improvement on its domestic and some export markets, an increase in production of plywood, and other wood-based panels is also expected by Canada in 1983.

60. For Europe, domestic requirements of particle board are expected to fall by 0.8 million m³ or 4 % to 22.8 million m³, and production by less than 0.7 million m³ or 3 % to 22.9 million m³. This would be the first time that the European particle board market showed a drop for two consecutive years. Relatively marked falls in domestic requirements are forecast by Italy, the Netherlands and Switzerland. A somewhat larger fall of 8 % is forecast for Europe's trade of particle board in 1982.

61. For 1983, a rise is forecast for Europe's production of particle board of 4 % to 23.8 million m³, and for domestic requirements of 2 % to 23.4 million m³. A recovery is also expected in 1983 for requirements and production of plywood and fibreboard in Europe, though of a smaller order than for particle board.

62. The reduced level of demand and production which the wood-based panels industries in North America and western Europe have experienced since 1980, under the influence of the prevailing economic conditions, and in particular the two main markets for panels, housing construction and furniture manufacture, is causing serious problems for the industry. Under-utilization of capacities and depressed price levels have made it difficult for many enterprises to operate economically. While problems of over-capacity had existed before in the industry, they were being exacerbated by the prolonged recession. Investment in the industry, it was pointed out, should therefore be aimed at rationalization rather than expansion. This was true also for the medium-density fibreboard (MDF) industry whose rapidly expanding capacity at present exceeded the market possibilities, although these appeared very promising in the longer term. At the same time, there were markets for specialty products, for instance for technical applications, which were less affected by the movements of economic cycles.

63. The Committee invited the Joint FAO/ECE Working Party on Forest Economics and Statistics to re-examine the units in which fibreboard is reported, given that data in cubic metres can be misleading. It should also consider whether to separate medium-density fibreboard (MDF) from other assortments of fibreboard in FAO and ECE statistics.

Pulpwood

64. In 1982, the pulp and paper sector in North America and Europe which had hitherto been spared the worst effects of the recession has encountered serious problems, due to the weakness of final demand for its products. In the first half of 1982, production of practically all grades of pulp and paper fell and capacity utilization rates were very low. The price of pulp on the international market, expressed in US dollars, fell sharply, while stocks rose in many countries. Almost all mills extended their summer breaks and several mills have been forced to shut down permanently.

65. This depressed state of affairs (along with the situation, described above, for particle board and fibreboard) was reflected in the markets for pulpwood. Demand was weak from almost all users and, in contrast to previous years, industries mostly did not complain of raw material shortages. Despite the expense of holding stocks, increases in pulpwood stock levels were reported from several countries. Roundwood pulpwood prices were also weak in 1982 in several countries.

66. For 1982, the Committee forecast a drop of 2.3 million m³ (1.4 %), in European domestic requirements of pulpwood, to 160.7 million m³. This is essentially due to reductions in requirements in Europe's two largest pulpwood users, Sweden (4 %) and Finland (8 %). For the latter country the estimated drop was much steeper for residues, chips and particles (15 %) than for round pulpwood (5.5 %), reflecting the reduced availability of the former from the sawmilling and plywood industries. France estimates that its domestic requirements of pulpwood will rise in 1982 by about 1 million m³ to 9.1 million m³. The United States foresees a drop in 1982 of 5 million m³ (2.7 %) to 178.2 million m³.

67. The Committee estimates that European domestic supply of pulpwood will also fall in 1982, by 3.5 million m³ (2.3 %), to 151.1 million m³, also due essentially to reductions in Sweden (1.8 million m³) and Finland (2.8 million m³) which outweighed moderate increases in a number of other countries. The United States estimates a drop in domestic supply of 5.9 million m³ to 180.5 million m³.

68. European trade in pulpwood in 1982 is forecast to drop more sharply than either domestic requirements or domestic supply, by 11 % to 20.2 million m³ for imports and by 25 % to 11.6 million m³ for exports. Sweden estimates a drop of 2.1 million m³ (35 %) to 4 million m³ in its imports and steep drops in exports are forecast by Czechoslovakia (31 %), Finland (57 %), France (22 %), Poland (33 %) and Sweden (34 %). The United States forecasts a drop of 1 million m³ (15 %) in its pulpwood exports (mostly chips) and decreases are also forecast by Canada and the USSR.

69. For 1983, the Committee forecast a recovery in domestic requirements and supply of pulpwood. European domestic requirements of pulpwood are expected to rise by 4 % to 167.5 million m³ and those in the United States also by 4 % to 185.3 million m³. European domestic supply of pulpwood is forecast to rise by 5 % to 158.9 million m³ and that in the United States by 4 % to 188.6 million m³. These forecasts assume that a broad recovery in demand would bring about an upturn in 1983 in the pulp and paper sector. Trade, however, is expected to continue to fall in many countries. European pulpwood imports are forecast to fall by 3 % in that year and exports by 2 %. Only in the United States are exports expected to rise by 20 % to 6.6 million m³.

70. The Committee noted that because the pulpwood using industries were mostly made up of a relatively few large units, capacity changes, such as the opening or closing of a single pulpmill had major effects not only on the level of domestic requirements of pulpwood, but also, in some cases, on the pattern of international trade. Several such developments have occurred in 1982, or were foreseen, and were reflected in the forecasts for pulpwood requirements.

71. The damage to forests caused by snow and wind in the winter of 1981/1982 in a number of areas notably in Denmark, the German Democratic Republic, the Federal Republic of Germany and Poland had raised pulpwood supplies in the regions affected, despite market stabilization measures. This has increased export availabilities as well as reducing import demand in the countries affected.

72. The Committee noted that it encountered greater difficulties in producing satisfactory estimates for the pulpwood sector than for other sectors, partly because of insufficiently precise assessment of trends for pulp and paper and possibly because of lack of comparability in definitions (e.g. of domestic requirements). It urged delegations to make every effort to ensure that their estimates for trends in the pulpwood market were as accurate as possible and requested the secretariat to examine ways of improving the situation.

(b) Medium-term survey of trends in the markets for pulpwood, wood for energy and miscellaneous roundwood

73. The Committee was briefly informed of the results of the survey, which will be issued shortly as Supplement 15 to Volume XXXIV of the Timber Bulletin for Europe. The first part of the survey had examined trends in removals of industrial wood in the 1970s, net trade and self-sufficiency in roundwood and prices, and had compared trends in the 1970s with the forecasts in European Timber Trends and Prospects, 1950 to 2000. The second part was a definitive version of the study on energy derived from wood, first presented to the thirteenth session of the Joint FAO/ECE Working Party on Forest Economics and Statistics.

(c) Exports of sawn hardwood and plywood by countries of the ECE region to countries of North Africa and West Asia

74. On the basis of TIM/R.84, the Committee was informed of the results of a preliminary analysis of the markets for sawn hardwood and plywood and other panels in North Africa and West Asia. This analysis was intended as the basis for a special

survey to be included in the Annual Forest Products Market Review and a complement to a similar survey on sawn softwood in the Market Review for 1980 (Supplement 1 to Volume XXXIV of the Timber Bulletin for Europe).

75. The secretariat in drawing attention to gaps in the available information on trade in plywood and sawn hardwood with these countries, suggested that an enquiry analogous to that undertaken two years ago on the trade in sawn softwood with this area might be circulated to ECE countries to obtain the required additional statistical information. Furthermore, it could be useful to explore other sources, recognizing the limitations on availability of relevant information.

76. The Committee agreed that a survey of these countries as markets for sawn hardwood and wood-based panels would be most useful and endorsed the suggestions made by the secretariat.

(d) Information on stocks of forest products

77. The Committee was informed, on the basis of TIM/R.85, of the preliminary results of the enquiry on information on stocks of forest products. This enquiry had been undertaken in accordance with the decision of the Joint FAO/ECE Working Party on Forest Economics and Statistics at its thirteenth session with a view to determining whether any improvements were possible.

78. The Committee took note of these preliminary results and considered that the extent of information obtained up to 31 July 1982, as set out in TIM/R.85, was not sufficient to permit an adequate assessment of the situation. It urged countries which had not yet done so to reply to the enquiry as soon as possible. A full report on the enquiry should be presented to the fourteenth session of the Working Party in June 1983.

Study of European Timber Trends and Prospects: progress report (Item 7 of the Agenda)

79. The Committee was informed by the secretariat of progress on the new study on long-term European timber trends and prospects (ETTS IV) on the basis of TIM/R.77. In particular, it endorsed the provisional plan set out in the annex to TIM/R.77, while recognizing that some modification of the plan might be necessary as work on the study progressed. It was suggested that the study might pay more attention to the effects of developments in trade with countries outside the region, notably Japan. The Committee also stressed the importance of using the best possible methodologies and requested countries to provide the secretariat, through their correspondents, with any information it might need in this respect.

80. The Committee re-affirmed the importance it attached to the nomination by each country of a small team of correspondents who would assist the secretariat by collecting information needed for the study, discussing relevant problems and arranging contacts with other experts in their countries. It was pointed out that the teams of correspondents for ETTS IV would generally have a composition different to those nominated for the forest resource enquiry. The Committee expressed its disappointment that many countries had still not nominated their teams of correspondents for ETTS IV, as requested by the Committee at its thirty-ninth session (ECE/TIM/19, para. 103(i)). It strongly urged all countries which had not yet done so to nominate their teams of correspondents and inform the secretariat without delay.

81. The Committee welcomed the suggestion that a series of meetings be arranged between secretariat members and the teams of correspondents, along with other interested experts, in individual countries. Such meetings would be helpful not only to the secretariat in gaining a better understanding of each country's situation and

prospects but also to the correspondents who would be better informed of the background to the study and have an opportunity to reflect on the long-term issues facing their country. A number of countries expressed their willingness to organize such meetings.

82. The Committee noted with regret that the availability of resources could be a limiting factor for the scope and quality of the study. It therefore repeated its call to member countries to make available supplementary resources for the carrying out of the study. It noted that a trust fund had been set up for the purpose of:

- (a) hiring consultants to prepare reports on subjects relevant to ETTS IV or to draft sections of the study
- (b) financing travel in connexion with ETTS IV
- (c) purchasing equipment to strengthen the secretariat's data processing capacity
- (d) improving the quality and comprehensiveness of ETTS IV in other ways.

83. The Committee invited all member countries to contribute to the trust fund and warmly thanked the Governments of the United States and Switzerland which had already made contributions to the fund.

84. Countries could also contribute in kind to the success of the study, notably by seconding experts to the secretariat for limited periods to carry out ETTS IV-related work and by supporting some or all of the costs connected with the meetings mentioned in paragraph 81 above. The Committee thanked those countries which had already indicated their intention to contribute to the work in these ways.

85. The representative of FAO informed the Committee of his organization's plans for longterm outlook studies, notably for the pulp and paper sector world-wide and a regional study for Africa. The Committee welcomed the fact that the FAO Forestry Department was also contributing to the preparation of ETTS IV. The Committee also welcomed the continuing co-operation between its secretariat and the International Institute for Applied Systems Analysis (IIASA).

Review of Timber Committee activities between its thirty-ninth and fortieth sessions
(Item 8 of the Agenda)

- (a) Stress grading and finger-jointing of coniferous sawn timber: publication of ECE Recommended Standards

86. The Committee was informed by Mr. W.E. Townsley (Canada), leader of the team of specialists, on the basis of TIM/R.78, that the ad hoc meeting scheduled for May 1982 to give final approval to the recommended standards had proved unnecessary and had therefore been cancelled, after consultation with the Committee's office-holders and himself as leader of the team of specialists. The recommended standards, and the approval forms, as presented in the annexes of TIM/WP.3/AC.3/10 (submitted to the Committee in 1981) were therefore being issued as supplement 16 to Volume XXXIV of the Timber Bulletin for Europe.

87. The Committee endorsed the suggestions made in TIM/R.78 for carrying out the recommendations of the 1981 ad hoc meeting (TIM/WP.3/AC.3/10, para. 15). In particular, with regard to the approval forms attached to the recommended standards, which were intended to facilitate the opening of trade in stress graded or finger-jointed timber, the Committee invited each country to nominate an institution or a person as a 'contact point'. The role of these contact points would be to receive the approval forms from intending exporters for transmittal to interested parties in their own country. They would usually represent their country's control or approval authority

or at least work in close liaison with it. The Timber Committee, or a suitable body appointed by the Committee, should establish, maintain and make available a list of such contact points. Nominations of 'contact points' should be received by 31 March 1983.

88. In addition, the Committee agreed that progress in implementing the recommended standards should be monitored by means of correspondents. The Committee therefore invited countries either to nominate correspondents to help monitor implementation, or to confirm the nomination of the correspondents already designated in 1977. Such nominations should also be received by 31 March 1983. Correspondents and the contact points mentioned in paragraph 87 have different functions and would probably not be the same people. The secretariat, in co-operation with the team of specialists, should carry out an enquiry in late 1983 into progress in implementing the standards.

89. The Committee welcomed the fact that informal contacts are taking place, on the expert level, with a view to reconciling the European and North American systems of stress grading, and requested the team of specialists to take up this question at an appropriate time.

90. The Committee noted that some countries would not be able at present to implement the recommended standards.

91. The Committee warmly thanked Mr. Townsley and the members of the team of specialists for their work.

92. The Committee was also informed of relevant activities of other international organizations, notably the forthcoming meeting of ISO TC 55 in Tashkent (USSR) in November 1982 and the UNIDO Expert Group Meeting on Timber Stress Grading and Strength Grouping, held in December 1981.

(b) Meeting of the team of specialists on sawmilling questions, Helsinki (Finland), 4 June 1982

93. The Committee was informed of the meeting of the team of specialists on sawmilling questions on the basis of TIM/R.79. It endorsed the report of the meeting contained in that document and the draft enquiry on the structure of the sawmilling industry, including the definition of production capacity given in Annex II of the enquiry.

94. The Committee agreed with the suggestion of the thirteenth session of the Joint FAO/ECE Working Party on Forest Economics and Statistics to circulate the enquiry in late 1983. It urged countries to take any special steps that might be necessary to acquire the information asked for in the enquiry by the time it was circulated. For the sake of comparability, data should as far as possible relate to the year 1982.

95. The Committee accepted the suggestion of the team of specialists that a seminar be organized for experts from developing countries on the methodology of data collection for the sawmilling industry. The possibility of hosting this seminar in 1984 will be considered by the Government of Finland. At the same time, the Committee agreed that this would partly depend on the availability of funds from other countries to provide fellowships for a number of participants from developing countries. The delegations agreed to examine the possibility of providing funds for this purpose.

96. The Committee thanked the Government of Finland for acting as host to the meeting of the team of specialists in June 1982. It also thanked Mr. Z. Tamminen (Sweden), leader of the team, and Mr. P. Miettinen (Finland) for their contribution to the work.

(c) Seminar on energy conservation and self-sufficiency in the sawmilling industry

97. The Committee was informed of the results of the seminar, which had been held at Bonn (Federal Republic of Germany) from 13-17 September 1982, on the basis of its report (TIM/SEM.13/2). The seminar had been accompanied by a series of study visits. The Committee endorsed the seminar's report and notably the conclusions and recommendations which contained, among other things, a discussion of the factors affecting the decisions as to whether sawmill residues should be used as raw material or as a source of energy. The Committee also noted that the seminar had preferred the term "by-products" to the more generally used term "residues", due to the growing importance of these materials. It requested the Joint FAO/ECE Working Party on Forest Economics and Statistics to look into this terminological question at its next session.

98. The Committee welcomed the fact that the proceedings of the seminar would be issued in early 1983 by the host Government. The Committee expressed its warm appreciation to the Government of the Federal Republic of Germany for organizing a most successful and interesting seminar and study visits.

(d) Study tour in Czechoslovakia

99. The Committee was informed of the results of the study tour in Czechoslovakia from 26 September to 2 October 1982. Participants had visited sawmills and plants for the manufacture of wood-based panels and cabinet, bentwood and kitchen furniture. The Committee warmly thanked the Government of Czechoslovakia for organizing a most interesting tour and for the generous hospitality offered to participants.

Special lecture: The state of the tropical forest (Item 9 of the Agenda)

100. As decided by the Timber Committee's office-holders, the special lectures presented to the Committee dealt with the state of the tropical forest.

101. Mr. J-P. Lanly of the FAO Forestry Department described the findings of a joint FAO/UNEP study completed in 1981 within the framework of the Global Environment Monitoring System. It examined the changes in the forests of 76 tropical countries which represent 87 % of the world's tropical forests, in Asia, Africa and Latin America. Common forms of degradation of the forest were described as: exploitation for fuelwood, subsistence agriculture involving, among other things, forest burning techniques for shifting cultivation and over-grazing. The rate of deforestation was seen as growing in Latin America, but levelling off in Asia and Africa, essentially because a large proportion of the accessible areas had already been exploited. The state of the forest was described as intricately linked to population density and growth. The future of the forest was seen as dependent on over-all national policies and management, for instance for land use, rural development, energy and trade.

102. Mr. G. Lemaignon, President of the International Technical Association for Tropical Timber (ATIBT), informed the Committee of the goals of his association. These include the efficient utilization of tropical forest resources from both production and consumption perspectives and the promotion of international trade. The first International Forum on Tropical Timber was recently organized by ATIBT in Rome. The speaker particularly noted the publication of a general nomenclature for tropical timber. It had been unanimously agreed at the forum that the industrial use of tropical timber is not the cause of the disappearance of the tropical forests. There must be co-operation in all fields between all interested parties (producers, consumers, traders, researchers, etc.) with the aim of conserving the tropical forest.

103. Mr. H. Jungius of the International Union for the Conservation of Nature and Natural Resources (IUCN) emphasized his organization's objectives concerning the rational use of nature and natural resources and its co-operation with the World Wildlife Fund (WWF). He described a number of integrated country programmes sponsored throughout the world to protect the tropical forest through conservation and management on a sustainable basis. The problems of reconciling development pressures with tropical forest survival were outlined. He stressed that IUCN was willing to work with all other interested organizations.

104. The Committee enjoyed the film "The Fragile Mountain" concerning the problems of conserving the mountain ecosystem in Nepal, presented by the Global Forest Fund. The Committee was also informed of the Global Forest Fund.

105. The Committee warmly thanked the lecturers for their interesting and informative presentation.

Activities of other Principal Subsidiary Bodies of ECE of interest to the Timber Committee (Item 10 of the Agenda)

106. The Committee was informed on the basis of document TIM/R.81 of the activities of other Principal Subsidiary Bodies of ECE dealing with problems of concern to it. It was also informed orally of the latest stage of the Commission's work on new and renewable sources of energy, which was of direct relevance to its own work in this field. The Committee took note of this information and agreed to take it into account when discussing its own programme of work.

Programme of work for 1983-1987 (Item 11 of the Agenda)

(a) Activities scheduled for 1983

(i) Joint FAO/ECE Working Party on Forest Economics and Statistics, fourteenth session

107. The Committee was informed of the main items to be considered at the fourteenth session of the FAO/ECE Working Party on Forest Economics and Statistics by its Chairman, Mr. E. Clicheroux (Belgium). These will include a review of the preliminary results of the three parts of the forest resource enquiry (general forest inventory data, volume and mass of tree and other woody biomass, role of forests in supplying environmental and other non-wood goods and services); results of the enquiries on forest fires and on the structure of the wood-based panels industries; results of work on labour productivity; studies on the economic aspects of the fuller use of forest biomass, on afforestation and reforestation and on the introduction of new forest machines and equipment; and results of work to extend the transfer of economic and statistical methods and experience in the forest and forest products sector.

108. The fourteenth session of the Working Party is scheduled to be held in Geneva from 13 to 17 June 1983.

(ii) Ad hoc meeting for prospects and policies for wood and energy

109. The Committee noted that developments in the energy sector could have a major impact on developments in the forest and forest products sector. Furthermore, it was extremely difficult to foresee the extent and even the direction of future changes because of the complexity of the interactions involved. It recalled that these were the reasons why it had included "the integration of energy aspects into the preparation of EPTS IV" in the four priority areas for action in the wood/energy field (see ECE/TIM/17, paras. 72-73) and convened an ad hoc meeting to discuss these problems and provide guidance to the secretariat on how to deal with them in EPTS IV. The team of specialists on wood/energy questions, under the leadership of Mr. A. Semadoni (Switzerland) had drawn up plans for this ad hoc meeting. The Committee endorsed the

team's suggestions for the objectives, provisional agenda and organization of the meeting set out in the annex to TIM/R.82. It noted that the meeting was scheduled for 2-4 May 1983 in Geneva. It agreed that the documentation for the meeting should include national reports to be prepared according to an outline to be circulated shortly by the secretariat. It also endorsed the team's suggestion that the title of the meeting should be "Ad hoc meeting on the impact of energy developments on the forestry and forest products sector".

110. The Committee also decided that the ad hoc meeting in May 1983 should take into consideration the results of the ad hoc meeting on new and renewable sources of energy, being organized under the auspices of the Commission in November/December 1982. It considered there was little risk of duplication of effort as the results of the Timber Committee's work in the energy field, including the ad hoc meeting in May 1983, provided valuable sectoral input to the Commission's broader programme on new and renewable sources of energy.

(iii) Study tour in the United Kingdom

111. The Committee was informed of the preparation for the study tour in the United Kingdom which will take place in Scotland and northern England from 18 to 24 September 1983. The theme of the tour will be "The opportunity and challenge of an increasing forest resource in an import-dominated wood market". Participants will visit forests, forest enterprises, an importer/converter's yard, a particle board/MDF mill, a paper-board mill and a research station.

(b) Review and revision of the draft programme of work for 1983-1987

112. The Committee considered its programme of work on the basis of a draft prepared by the secretariat (TIM/R.83), which took into account the programme the Committee had approved at its thirty-ninth session, the resolution, decisions and discussions of the Commission at its thirty-seventh session, and the results of meetings of the Committee's subsidiary bodies. The Committee also took into account its discussions and decisions under other items of the agenda.

113. The Committee was informed that the response by countries to the invitation it had extended at its thirty-ninth session to nominate experts for teams of specialists for projects 14.3.3. - Economic and technical developments in the furniture industry and 14.3.4. - Modernization in the wood-based panels industries had been insufficient to allow teams with a suitable geographic distribution to be established. It had not therefore been possible for proposals on activities in these fields to be formulated, as this task had been assigned to the teams. While a number of delegations expressed doubt about the Committee undertaking work on furniture, due to the limited resources available, others attached particular importance to activities in this field. After detailed discussion, the Committee agreed that a report should be undertaken by a team of specialists, under the leadership of Romania; the team should consist of the experts who had been nominated by Bulgaria, Czechoslovakia and Poland, as well as others from interested countries. Countries should be invited to provide information on the basis of a simple outline to be prepared by Romania in consultation with the secretariat. The report should be submitted to the Committee's forty-second session, which should consider further action in the light of its findings.

114. The Committee decided that no action be taken on project 14.3.4. - Modernization in the wood-based panels industries, and that this project be removed from the programme of work pending a decision at a future session on possible new activities.

115. In connexion with projects 14.4.2. - Energy conservation and self-sufficiency in the wood-processing industries and 14.5.2.6. - Information base on the use of wood for energy, the Committee accepted the recommendation of the team of specialists on wood/energy questions that, as the team had fulfilled the mandate extended to it by the Committee, it should be disbanded in its present form (TIM/R.83/Add.1). It expressed its deep appreciation to Mr. A. Semadeni, the team leader, and the other members of the team for their important contribution in initiating the Committee's activities on wood and energy.

116. The Committee underlined the importance it attached to wood and energy questions and considered that its work in this field should now concentrate more on technical aspects. It decided to maintain project 14.4.2. in its programme of work. This project could also cover matters previously dealt with in project 14.5.2.6., which should therefore be removed from the programme of work. On the basis of the proposals by the USSR set out in annex I to TIM/R.83/Add.1, the Committee decided to reconstitute the team of specialists to carry out a study on the technical aspects of the generation of energy from wood. Countries were invited to nominate specialists to join the team, and to inform the secretariat of their names by 31 March 1983. The USSR's offer to assist in the work of establishing the new team was gratefully accepted.

117. The Committee was informed of the establishment by FAO of a European Co-operative Research Network on Rural Energy, which included forest biomass, and of the wish expressed by delegates to the Thirteenth FAO Regional Conference for Europe that the energy activities of the Timber Committee, the Committee on Agricultural Problems and the FAO Network be carried out in close co-operation.

118. The Committee accepted with appreciation the offer of Switzerland to organize a study tour (project 14.5.5. - Dissemination and exchange of general information and experience) in conjunction with the Committee's forty-second session in 1984.

119. The Committee approved its programme of work for 1983-1987 as set out in annex II.

Other business (Item 12 of the Agenda)

120. Mr. J. Burzyński (Poland) informed the Committee on the problem of the pine nun moth (Lymantria monacha L.) in Poland. The extensive damage caused by the insect was described as well as the campaign launched against it (2.3 million ha treated in 1982 by ten thousand men). The size and rapid expansion of the affected areas was quite unprecedented, and so far progress of the pest had not been stopped. Countries bordering on Poland had also been affected. The Committee thanked Mr. Burzyński for his presentation of this extremely worrying problem and wished the Polish authorities every success in their efforts to bring the pine nun moth under control.

121. The Committee thanked the delegation of the USSR for bringing two films, "Integrated utilization of wood" and "Ust-Ilim complex - CMEA construction" which were shown.

122. The Committee warmly thanked the Swiss delegation for organizing an interesting and informative morning tour of the Arboretum and Wood Museum in the Aubonne Valley, Canton de Vaud.

123. The representative of FAO drew the Committee's attention to the holding of a second World Food Day on 16 October 1982.

Adoption of the report of the Committee's session (Item 13 of the Agenda)

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

Date of the next session

125. The Committee agreed that its next session should be held from 10 to 14 October 1983, subject to the availability of conference services for that period.

Annex I

Europe (excl. USSR) : Summary table of market forecasts for 1982 and 1983

(million m3)

		Domestic require- ments	Produc- tion	Imports	Exports
Sawn softwood	1981 (actual)	73.68	68.82	23.84	26.58 _a /
	1982 (estimates)	71.42	66.01	24.41	26.55 _a /
	1983 (estimates)	72.35	67.13	25.44	27.17 _a /
Coniferous logs	1981 (actual)	119.61	118.19	5.40	3.66
	1982 (estimates)	115.65	113.80	5.03	3.09
	1983 (estimates)	118.81	116.23	5.43	2.86
Sawn hardwood	1981 (actual)	20.93	18.32	4.99	2.49
	1982 (estimates)	20.39	17.98	4.79	2.42
	1983 (estimates)	20.87	18.44	4.94	2.53
- Temperate-zone	1981 (actual)	2.36*	2.29*
	1982 (estimates)	2.17*	2.23*
	1983 (estimates)	2.07*	2.32*
- Tropical	1981 (actual)	2.63*	0.20*
	1982 (estimates)	2.62*	0.19*
	1983 (estimates)	2.87*	0.21*
Hardwood logs	1981 (actual)	39.49	34.23	7.53	2.34
	1982 (estimates)	39.27	34.38	7.26	2.15
	1983 (estimates)	40.04	34.98	7.11	2.22
- Temperate-zone	1981 (actual)	2.63*	2.27*
	1982 (estimates)	2.51*	2.09*
	1983 (estimates)	2.54*	2.16*
- Tropical	1981 (actual)	4.90*	0.07*
	1982 (estimates)	4.75*	0.06*
	1983 (estimates)	4.57*	0.06*
Particle board	1981 (actual)	23.65	23.57	4.62	4.69
	1982 (estimates)	22.84	22.92	4.26	4.33
	1983 (estimates)	23.38	23.85	4.16	4.62
Plywood	1981 (actual)	5.14	3.44	3.13	1.43
	1982 (estimates)	5.02	3.29	3.08	1.38
	1983 (estimates)	5.06	3.41	3.05	1.40
Fibreboard	1981 (actual)	4.34	4.07	1.38	1.15
	1982 (estimates)	4.37	4.23	1.24	1.08
	1983 (estimates)	4.42	4.34	1.24	1.17
Pulpwood	1981 (actual)	163.06	154.63	22.81	21.27 _a /
	1982 (estimates)	160.75	151.12	20.20	16.92 _a /
	1983 (estimates)	167.52	158.86	19.65	16.39 _a /
- roundwood, coniferous	1981 (actual)	84.33*	79.85*	10.61	7.57
	1982 (estimates)	83.42*	77.25*	9.52	5.34
	1983 (estimates)
- roundwood, broadleaved	1981 (actual)	31.90*	30.97*	7.25	4.47
	1982 (estimates)	32.78*	31.10*	6.67	3.43
	1983 (estimates)
- residues, chips and particles	1981 (actual)	46.83*	43.81*	4.95	3.39
	1982 (estimates)	44.55*	42.77*	4.01	2.86
	1983 (estimates)

a/ Including USSR.

ANNEX IITIMBER COMMITTEE PROGRAMME OF WORK FOR 1983-1987WORK AREA 14.1: MEDIUM AND LONG-TERM TRENDS AND PROSPECTS14.1.1. Review of projections made in the 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.

Work accomplished: Work was initiated on the new long-term study, including despatch of invitations to countries to participate in the work, collection and preliminary analysis of information, and comparison of real trends up to 1980 with projections made in the previous study.

Work to be undertaken: Work on the new study will continue, including the convening of an ad hoc meeting in 1983 on the impact of energy developments on the forestry and forest products sector, which will take into account the findings of the ad hoc meeting on new and renewable sources of energy, being convened by the Commission. A draft of the study will be prepared with target dates of 1985 for review by an ad hoc meeting and 1986 for final publication.

Duration: Continuing.

14.1.2. Medium-term trends in the structure and capacity of the wood-processing industries14.1.2.1. 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.

Work accomplished: The revised form of enquiry, as approved by the Joint FAO/ECE Working Party on Forest Economics and Statistics, was sent to member countries for completion.

Work to be undertaken: The preliminary results of the enquiry will be reviewed by the Working Party. If approved by the Working Party, they will subsequently be revised and published. The next survey should be undertaken in 1985/86.

Duration: Continuing.

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.

Work accomplished: A team of specialists met to draw up a draft form of enquiry for approval by the Timber Committee.

Work to be undertaken: Following approval of the draft enquiry, countries will be invited to take steps to collect the information requested, in preparation for the circulation of the enquiry in late 1983. A seminar will be held in 1984 in Finland (subject to confirmation) on the methodology of data collection on the sawmilling industry, intended especially for experts from developing countries. The Committee will decide later whether a meeting of the team of specialists will be held on the same occasion.

Duration: Continuing.

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.

Work accomplished: The medium-term survey of the markets for pulpwood, wood for energy and miscellaneous roundwood was published.

Work to be undertaken: Further medium-term surveys will be postponed until after completion of the long-term study (project 14.1.1.). Thereafter, they will be resumed on a 3-year rotation of the following sectors: sawnwood and sawlogs; wood-based panels; and pulpwood, wood for energy and miscellaneous roundwood.

Duration: Continuing after 1985.

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.

Work to be undertaken: The Committee will convene an ad hoc meeting at an appropriate time 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.

Duration: 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

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.

Work accomplished and to be undertaken: The annual session of the Timber Committee reviews short-term trends and prospects in the production, trade, consumption and prices of coniferous and non-coniferous (including tropical) logs and sawnwood, wood-based panels and pulpwood, on the basis of estimates and other market information prepared by delegations for the year in progress and the forthcoming year. An analysis of market trends, based on the Committee's discussions is published after the session, as well as an Annual Forest Products Market Review based on data supplied by governments in connexion with project 14.5.1.

Duration: Continuing.

14.2.2. Rationalization of the flow of forest products from the forest of 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 identifying 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.

Work to be undertaken: The Committee will decide on activities in this field, as and when appropriate.

Duration: To be decided.

14.2.3. Review of standardization activities

Description: The Committee will keep under review 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). 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.

Work to be undertaken: The Timber Committee will review all its standardization activities, when it considers this appropriate in the light of developments, notably progress on projects 14.2.4. and 14.2.5. It will also maintain co-operation with ISO and its appropriate technical committees.

Duration: Continuing.

14.2.4. Standardization of stress grading and finger-jointing of coniferous sawn timber

Description: The Committee will encourage the incorporation of the provisions of the revised ECE Recommended Standards on stress grading of coniferous sawn timber and on finger-jointing in structural coniferous sawn timber into national standards, and undertake further work to extend their international acceptability and application with a view to ensuring the rational and economic use of, and to facilitating trade in, coniferous sawn timber.

Work accomplished: ECE Recommended Standards on stress grading and finger-jointing of coniferous sawn timber, and the approval forms for structural timber, were published.

Work to be undertaken: Countries will supply the secretariat with the names of "contact points" that will receive the approval forms intended to facilitate the opening of trade in stress graded or finger-jointed coniferous sawn timber. The Committee will draw up, publish and maintain a list of these contact points. Countries will also supply the names of their correspondents to help monitor the implementation of the ECE recommended standards. The team of specialists will carry out an enquiry in 1983/84 into progress in implementing the standards; and will take steps at the appropriate time to reconcile the European and North American systems of stress grading.

Duration: 12 years ending in 1984.

14.2.5. 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.

Work to be undertaken: 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.

Duration: To be decided.

14.2.6. Problems of classification and definitions

Description: The Joint FAO/ECE Working Party on Forest Economics and Statistics, in co-operation with the Conference of European Statisticians, will keep under review and co-operate in the work of harmonizing multi-sector classifications and definitions (e.g. the CCC Harmonized System, ICGS, SITC, ISIC), developments in technology and in industrial and trade practice, to ensure that the appearance of new products and changes in organizational structures are taken into account.

Work accomplished: "Classification and Definitions of Forest Products" was published.

Work to be undertaken: The Working Party will consider the results of a review of the parts of the ISIC and the ILO ISCO relating to forestry and forest industries with a view to formulating proposals for their possible revision.

Duration: 1 year ending 1983.

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/ILU 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 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.

Work accomplished: A preparatory meeting for the seminar on machines and techniques for plant production was held in April 1982.

Work to be undertaken: A seminar on machines and techniques for plant production will be held in 1983 in Czechoslovakia in collaboration with IUFRO. Other seminars will be organized at intervals as decided by the Joint Committee.

Duration: Continuing.

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.

Work accomplished: A seminar on forest fire prevention and control was held in Poland in May 1981 in collaboration with IUFRO. A team of specialists was set up by the Steering Committee to follow up the recommendations of this seminar.

Work to be undertaken: A seminar will be held in Portugal in 1985. The team of specialists will submit proposals for the follow-up to the 1981 seminar in Warsaw to the sixth session of the Steering Committee, which will guide the team on further action to be taken. For certain activities, e.g. forest fire statistics, it will work in collaboration with the Joint FAO/ECE Working Party on Forest Economics and Statistics (project 14.5.2.5.).

Duration: 3 years ending in 1985.

14.3.1.1.3. Methods and procedures for the preparation and implementation of working forest management plans

Description: The Joint Committee will survey practical methods and procedures for the preparation and implementation of working forest management plans, with special emphasis on the determination, collection and processing of relevant data with a view to assisting forest managers in the execution of their tasks.

Work to be carried out: A seminar will be organized in 1986 in (country to be decided) on (precise scope to be decided).

Duration: 4 years ending in 1986.

14.3.1.1.4. 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.

Work accomplished: A team of specialists carried out work on a publication on methods and equipment for afforestation operations under Mediterranean conditions.

Work to be undertaken: (a) The team of specialists will submit a progress report on its work to the Steering Committee at its sixth session in 1983 and the draft of the complete study to the fifteenth session of the Joint Committee in 1984.

(b) A seminar will be held in Turkey in 1984 on machines and techniques for the conversion of degraded and low productivity woodland into productive forest.

Duration: 3 years ending in 1984.

14.3.1.1.5. 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.

Work accomplished and to be undertaken: (a) The Joint Committee keeps close contact with ISO technical committees relevant to its work and reviews, at each of its sessions, ISO standardization activities carried out over the past 2 years.

(b) Lists of basic terms and concepts, with definitions, are issued in the 3 working languages for seminars held under the auspices of the Joint Committee.

Duration: Continuing.

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.

Work accomplished: A preparatory meeting for the seminar on reducing forest biomass losses in logging operations was held in April 1982. Invitations were sent out to countries to prepare basic papers and country reports.

Work to be undertaken: Seminars on selected items will be held at intervals: in December 1982 in the USSR, on reducing forest biomass losses in logging 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 (exact subject to be decided by the Steering Committee taking into account the findings of the seminar on the planning and techniques of transport and its relation to forest operational activities). The Steering Committee will consider a proposal for a project on the use of different types of aircraft in forest operations and submit its findings to the fifteenth session of the Joint Committee.

Duration: 3 years ending in 1985.

14.3.1.2.2. Location and methods of primary roundwood conversion

Description: The Joint Committee will study the optimum location for the primary conversion of wood raw material and the extent and type of conversion carried out under different conditions with a view to reducing the costs of raw material to the user, optimizing the quality assortments, reducing harvesting losses and minimizing damage to the environment.

Work to be undertaken: The sixth session of the Steering Committee will draw up a plan of work for a team of specialists, taking into account relevant activities of IUFRO, the findings of the seminar on reducing biomass losses in logging operations in the USSR in 1982 and proposals to be submitted by the Federal Republic of Germany.

Duration: 2 years beginning in 1983.

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.

Work accomplished: A seminar on the planning and techniques of transport and its relation to operational activities in forestry, together with a study tour, was held in Norway in June 1982, in collaboration with IUFRO, in conjunction with the fourteenth session of the Joint Committee.

Work to be undertaken: A seminar will be held in 1984 (or 1985) in (country to be decided) on methods and techniques of forest road construction.

Duration: 3 years ending in 1985.

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.

Work accomplished: A team of specialists prepared a draft proposal for a descriptive terrain classification for forestry in collaboration with IUFRO and taking into account the work of the European Economic Community.

Work to be undertaken: The team of specialists will complete its proposals on a descriptive terrain classification and submit them to the sixth session of the Steering Committee which will make proposals on whether and what further work should be undertaken in this field.

Duration: To be considered by the Steering Committee at its sixth session.

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.

Work accomplished: A team of specialists prepared a draft classification of methods and equipment for wood harvesting which constitutes the first part of the study on the compatibility of harvesting methods and equipment with silviculture and the environment.

Work to be undertaken: The team of specialists will submit a progress report on the second part of the study to the sixth session of the Steering Committee and the draft of the final version of the study to the fifteenth session of the Joint Committee, which will decide on possible further activities.

Duration: To be decided by the Joint Committee at its fifteenth session.

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.

Work accomplished and to be undertaken: A team of specialists presents a report on activities in the field of wood harvesting for energy purposes to the biennial sessions of the Joint Committee, including activities of other international organizations, notably the International Energy Agency.

Duration: Continuing.

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.

Work accomplished: (a) A seminar on the management of forest worker training was held in the United Kingdom in 1982.

(b) A team of specialists to follow up the recommendations of the seminar on vocational training and extension services for small-scale forest owners and farmers (held in 1980) prepared a report and submitted it to the fourteenth session of the Joint Committee.

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

Work to be undertaken: (a) A seminar on extension services will be held in 1984 (year to be confirmed) in the United States.

(b) The team of specialists on vocational training and extension services for small-scale forest owners will collaborate on the preparation of the seminar on extension services mentioned above.

Duration: 2 years beginning in 1983.

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.

Work accomplished: A team of specialists prepared a report on the vocational rehabilitation of forest workers, with conclusions and recommendations, and presented it to both the seminar on occupational safety and health and applied ergonomics in highly mechanized logging operations in Canada in 1981 and to the fourteenth session of the Joint Committee.

Work to be undertaken: A team of specialists on problems of vocational training of forest workers will start after the fifteenth session of the Joint Committee and submit a report to the sixteenth session of the Joint Committee in 1985.

Duration: 2 years beginning in 1984.

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 job.

Work accomplished: A seminar on occupational safety and health and applied ergonomics in highly mechanized logging operations was held in Canada in 1981 in collaboration with IUFRO.

Work to be undertaken: Seminars will be organized at intervals on selected problems.

(a) A seminar on ergonomics applied to forestry will be organized by the Government of Austria in 1983 in collaboration with the Joint Committee and IUFRO.

(b) A seminar on vocational rehabilitation and occupational health services for forest workers will be held in Finland in 1985 in collaboration with Sweden.

Duration: (a) Continuing;

(b) 3 years ending in 1985.

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.

Work to be undertaken: A team of specialists on chemicals in forestry will be set up after the sixth session of the Steering Committee in 1983. The team will study the use of chemicals and the health hazards involved, review existing safety measures and regulations and submit a report, with recommendations for possible improvements, to the fifteenth session of the Joint Committee.

Duration: 2 years beginning in 1983.

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.

Work accomplished and to be undertaken: Co-operation is maintained with UNCTAD and FAO in their activities relating to markets for tropical timber.

Duration: To be decided.

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.

Work accomplished: Governments were invited to nominate experts to serve on a team of specialists, which should prepare a draft programme of activities in this field for consideration by the Timber Committee.

Work to be undertaken: Based on information which countries will be invited to provide, a report will be undertaken by a team of specialists under the leadership of Romania on economic and technical developments in the furniture industry and submitted to the Committee's forty-second session, which will then decide on further action.

Duration: 2 years beginning 1983.

14.3.4. 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 Industry 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 of forest products in the ECE region and the availability of raw material for traditional wood-using industries.

Work accomplished: The special lectures on this topic presented to the thirty-ninth session of the Timber Committee were published.

Work to be undertaken: On the basis of information provided by governments, the use of wood for chemical products will be taken account of in the new long-term study (project 14.1.1.). The Committee will also keep under review developments in the sector, undertaking periodic surveys as and when necessary.

Duration: Continuing.

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.

Work accomplished: An enquiry was circulated on the role of forests in supplying environmental and other non-wood goods and services.

Work to be undertaken: The preliminary results of the enquiry will be considered by the Working Party's fourteenth session in 1983. After further analysis, with the assistance of correspondents nominated by governments, the results will be published and used in the study under project 14.1.1.

Duration: 3 years, ending in 1985.

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.

Work accomplished: A seminar on energy conservation and self-sufficiency in the sawmilling industry, was held in the Federal Republic of Germany.

Work to be undertaken: A team of specialists will be established, with the assistance of the USSR, to carry out a study on the technical aspects of the generation of energy from wood which will be submitted to the Committee's forty-second session. The Committee will decide on further activities to be undertaken in the field of wood and energy.

Duration: 2 years starting 1983.

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.

Work accomplished and to be undertaken: The secretariat publishes two issues a year of 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 a supplement, four times a year, of monthly prices of forest products and related data. Country forest and forest products profiles are prepared by the secretariat in collaboration with the governments of the countries concerned, and published.

Duration: Continuing.

14.5.2. Selected problems of economics and statistics of forestry and forest products

This project, together with projects 14.5.3. and 14.5.4. is carried out by the Joint FAO/ECE Working Party on Forest Economics and Statistics which normally meets biennially (1983, 1985, 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 for the collection and dissemination of statistical data, to ensure that it corresponds with the needs of governments.

Work accomplished and to be undertaken: The Working Party formulates 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. The Working Party will review the results of the enquiry on the availability of information on stocks of forest products and formulate proposals for further action to be taken on this matter.

Duration: Continuing.

14.5.2.2. Conversion factors

Description: The Working Party will review the conversion factors (raw material input/product output) 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.

Work accomplished: The results of the latest enquiry were published under the title "Conversion Factors for Forest Products".

Work to be undertaken: The Working Party will continue to review at four-yearly intervals (the next in 1985) conversion factors communicated by governments in reply to a questionnaire.

Duration: Continuing.

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.

Work accomplished: An enquiry was circulated on the forest resource, including forest biomass, in conjunction with project 14.4.1.

Work to be undertaken: The preliminary results of the enquiry will be considered by the Working Party's fourteenth session. After further analysis, with the assistance of correspondents nominated by governments, the results will be published and also made use of in the study under project 14.1.1. Activities linked with project 14.4.1.

Duration: 3 years ending in 1985.

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.

Work accomplished: Under the leadership of the Finnish Forest Research Institute a study was started on labour productivity in countries at different stages of development in mechanization of forestry and harvesting operations.

Work to be undertaken: A report will be submitted to the Working Party's fourteenth session in 1983.

Duration: 1 year ending in 1983.

14.5.2.5. Forest fire statistics

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

Work accomplished: "Forest Fire Statistics" was published. A team of specialists was established to prepare proposals in co-operation with the European Economic Community, for improvements to the form of enquiry (linked with project 14.3.1.1.2.).

Work to be undertaken: The revised enquiry will be circulated and the results presented to the fourteenth session of the Working Party in 1983. The team of specialists will formulate guidelines for the estimation of losses from forest fires. Enquiries will be undertaken at 2-year intervals.

Duration: Continuing.

14.5.3. Studies of selected economic problems

14.5.3.1. Economic aspects of the fuller use of 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.

Work to be undertaken: Under the leadership of specialists in the USSR, the report submitted to the thirteenth session of the Working Party will be improved and extended to incorporate information supplied by other countries. The work on this project will be drawn to the attention of the seminar organized by the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers on reducing forest biomass losses in harvesting operations (project 14.3.1.2.1.), and a revised report will be submitted to the Working Party's fourteenth session, which will decide on further action.

Duration: To be decided by the fourteenth session of the Working Party.

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.

Work to be undertaken: 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 preliminary report to the fourteenth session of the Working Party.

Duration: To be decided by the fourteenth session of Working Party.

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

Work to be undertaken: Under the leadership of specialists in the USSR, the report submitted to the thirteenth session of the Working party will be improved and extended to incorporate information supplied by other countries in conjunction with the work on project 14.5.2.4. A revised report will be submitted to the fourteenth session of the Working Party in 1983, which will make proposals for further action, including co-operation with the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers.

Duration: To be decided by the fourteenth session of Working Party.

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, assembling and dissemination in the forest and forest products sector.

Work accomplished and to be undertaken: Participation of countries of other regions is encouraged, particularly at Working Party meetings with subject matter relevant to their interests. Member countries of the Working Party's parent bodies are invited to support such participation through provision of fellowships, where feasible. Publication of results of the relevant parts of the Working Party's output is promoted to make them readily available to countries of other regions. Under the leadership of Norway, information on methods and procedures in the collection of statistics on forestry and forest industry in the Nordic countries will be provided to the fourteenth session of the Working Party. An informal list of country correspondents from other regions will be established to provide contact with the FAO Forestry Statistics and Economics Analysis Unit on forestry economics and statistical questions.

Duration: Continuing.

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 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.

Work accomplished: A study tour was held in Czechoslovakia in 1982. The Timber Committee Yearbook 1981 was issued.

Work to be undertaken: Study tours will be held in the United Kingdom in 1983 and Switzerland in 1984^{1/}. A Yearbook describing briefly the Committee's activities over the past year will be issued annually.

Duration: Continuing.

1/ Host countries to be decided for the years from 1985 to 1987 inclusive.

Tabular presentation of Timber Committee programme of work for 1983-1987

Project number	Project	1983	1984	1985	1986	1987
	<u>WORK AREA 14.1 : MEDIUM AND LONG-TERM TRENDS AND PROSPECTS</u>					
14.1.1.	Review of projections made in study " <u>European Timber Trends and Prospects, 1950-2000</u> " in relation to actual developments	<u>Ad hoc</u> meeting on the impact of energy developments on the forestry and forest products sector	Preparation of draft study, review by <u>ad hoc</u> meeting (possibly 1985), revision and publication (possibly 1986)			
14.1.2.	Medium-term trends in the structure and capacity of wood-processing industries	Survey of wood-based panels industries	Survey of sawmilling industry Seminar in Finland (subject to confirmation)		Survey of wood-based panels	
14.1.3.	Medium-term trends in the markets for specific forest products	Medium-term studies held in abeyance during preparations of long-term study (project 14.1.1.)			Wood-based panels	Sawnwood and sawlogs
14.1.4	Trends, prospects and policies in southern Europe	<u>Ad hoc</u> meeting on the production and marketing of products of specific interest to Mediterranean forestry (year and host country to be decided)				
	<u>WORK AREA 14.2 : CURRENT MARKET DEVELOPMENTS AND SHORT-TERM PROSPECTS, INCLUDING PROBLEMS RELATING TO INTERNATIONAL TRADE</u>					
14.2.1.	Review of production, trade, consumption and prices of forest products	Continuing				
14.2.2.	Rationalization of the flow of forest products from the forest to the consumer, including transport and handling problems	Committee to keep under review				
14.2.3.	Review of standardization activities	Continuing, co-operation maintained with ISO and its appropriate Technical Committees				
14.2.4.	Standardization of stress grading and finger-jointing of coniferous sawn timber	Implementation of follow-up recommendations Nomination of contact points and correspondents		Study by team of specialists of implementation of standards		
14.2.5.	Reduction of the number of standard dimensions of sawn-wood entering international trade	Committee to keep under review				
14.2.6.	Problems of classification and definitions	Review of parts of ISIC and the ILO ISCO relating to forestry and forest industries				

Tabular presentation of Timber Committee programme of work for 1983-1987 (cont.)

Project number	Project	1983	1984	1985	1986	1987
	<u>WORK AREA 14.3 : SELECTED ECONOMIC, TECHNOLOGICAL AND MANAGERIAL PROBLEMS</u>					
14.3.1.	Forest working techniques and training of forest workers	Activities of the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers				
		Sixth session of Steering Committee	Fifteenth session in Turkey	Seventh session of Steering Committee	Sixteenth session in 1/	Eighth session of Steering Committee Seminar in 1/ on
14.3.1.1.	<u>Silvicultural operations and general management aspects</u>					
14.3.1.1.1.	Development and use of machinery and methods for stand establishment, including planting stock and equipment	Seminar in Czechoslovakia on machines and techniques for plant production				
14.3.1.1.2.	Forest fire prevention and control	Report to fifteenth session by team of specialists		Seminar in Portugal		
14.3.1.1.3.	Methods and procedures for the preparation and implementation of working forest management plans				Seminar in 1/	
14.3.1.1.4.	Development of methods and equipment for silvicultural operations and multiple use forestry under Mediterranean conditions		Seminar in Turkey on machines and techniques for the conversion of degraded and low-productivity woodlands into productive forests			
		Submission by team of specialists of draft of final study on afforestation methods and equipment under Mediterranean conditions to fifteenth session				
14.3.1.1.5.	Standardization activities in the field of forestry, including standardization of concepts and terms used by the Joint Committee		Review by Joint Committee on basis of report from ISO		Review by Joint Committee on basis of report from ISO	
		Terms and definitions to be prepared in connexion with each seminar				
14.3.1.2.	<u>Wood harvesting and transport</u>					Seminar in 1/ on
14.3.1.2.1.	Development and use of logging machinery	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		
14.3.1.2.2.	Location and methods of primary roundwood conversion	Proposals to be drawn up by Steering Committee for activities by a team of specialists				

1/ Host country to be decided.

Tabular presentation of Timber Committee programme of work for 1983-1987 (cont.)

Project number	Project	1983	1984	1985	1986	1987
14.3.1.2.3.	Forest roads and transport of wood raw material		Seminar in 1984 or 1985 in ^{1/} on methods and techniques of forest road construction			
14.3.1.2.4.	Terrain classification from the wood harvesting point of view	Further activities to be proposed by Steering Committee				
14.3.1.2.5.	Compatibility of harvesting methods and equipment with silviculture and the environment	Submission by team of specialists of draft of final study				
14.3.1.2.6.	Harvesting of wood for energy purposes	Report by team of specialists on new developments at each session of the Joint Committee				
14.3.1.3.	<u>Human aspects of forest operations</u>					Seminar in ^{1/} on
14.3.1.3.1.	General questions of vocational training in forestry		Seminar in USA (or in 1983) on extension services		Seminar in ^{1/} on	
14.3.1.3.2.	Specific problems of vocational training in forestry			Report to sixteenth session by team of specialists on vocational training of forest workers		
14.3.1.3.3.	General questions of applied ergonomics, safety and health in forest operations	Austrian seminar on ergonomics in collaboration with Joint Committee and IUFRO		Seminar in Finland on vocational rehabilitation and occupational health services for forest workers		
14.3.1.3.4.	Specific problems of applied ergonomics, safety and health in forest operations	Report to Joint Committee by team of specialists on chemicals in forestry - health hazards and protection				
14.3.2.	Utilization of tropical hardwoods	Review in co-operation with UNCTAD and FAO				
14.3.3.	Economic and technical development in the furniture industry	Report by team of specialists on economic and technical developments in the furniture industry (to be submitted to Committee's forty-second session)				
14.3.4.	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	Timber Committee to keep developments in the sector under review and undertake periodic surveys				

^{1/} Host country to be decided.

Tabular presentation of Timber Committee programme of work for 1983-1987 (cont.)

Project number	Project	1983	1984	1985	1986	1987
	<u>WORK AREA 14.4 : ENVIRONMENTAL AND RESOURCE CONSERVATION PROBLEMS</u>					
14.4.1.	Quantification and evaluation of the environmental benefits of forests	Preliminary report on results of enquiry to be presented to Working Party	Further activities, as decided by Working Party, linked with project 14.5.2.3.			
14.4.2.	Energy conservation and self-sufficiency in the mechanical wood processing industries	Establish team of specialists to do study on the technical aspects of generation of energy from wood (for submission to Committee's forty-second session)		Further work to be decided by Committee		
	<u>WORK AREA 14.5 : COLLECTION, EXCHANGE AND DISSEMINATION OF INFORMATION, INCLUDING IMPROVEMENT AND HARMONIZATION OF STATISTICS</u>					
14.5.1.	<u>Timber Bulletin for Europe</u>	Continuing (publication twice yearly of Bulletin and four times yearly of price supplement, preparation of country forest and forest products profiles)				
14.5.2.	Selected problems of economics and statistics of forestry and forest products	Together with projects 14.5.3. and 14.5.4., activities of the Joint FAO/ECE Working Party on Forest Economics and Statistics Fourteenth session of Working Party		Fifteenth session of Working Party		Sixteenth session of Working Party
14.5.2.1.	Organization and periodicity of statistical data collection and dissemination	Continuing Review at each session of Working Party; review of the results of the enquiry on the availability of information on stocks of forest products and formulation of proposals for further action				
14.5.2.2.	Conversion factors		Four-yearly survey at fifteenth session and publication			
14.5.2.3.	Forest resource analysis	Preliminary report on results of enquiry to be submitted to fourteenth session	Further activities, to be proposed by Working Party, linked with projects 14.1.1. and 14.4.1.			
14.5.2.4.	Labour statistics	Preliminary report on results of study on labour productivity to be submitted to fourteenth session				
14.5.2.5.	Forest fire statistics	Biennial survey for review at fourteenth session and publication	Biennial survey for review at fifteenth session and publication		Biennial survey for review at sixteenth session and publication	
14.5.3.	Studies of selected economic problems					
14.5.3.1.	Economic aspects of the fuller use of the forest biomass	Revised report to be submitted to fourteenth session				

Tabular presentation of Timber Committee programme of work for 1983-1987 (cont.)

Project Number	Project	1983	1984	1985	1986	1987
14.5.3.2.	Economic aspects of afforestation and reforestation	Report to fourteenth session by team of specialists				
14.5.3.3.	Economic aspects of the introduction of new forest machines and equipment	Revised report to be submitted to fourteenth session (linked with project 14.5.2.4.)				
14.5.4.	Transfer of economic and statistical methods and experience in the forest and forest products sector	Information on methods and procedures in collection of statistics on forest and forest industry to be reported to fourteenth session				
14.5.5.	Dissemination and exchange of general information and experience	Study tour in the United Kingdom Publication of Timber Committee Yearbook (annual)	Study tour in Switzerland	Study tour in ^{1/}	Study tour in ^{1/}	Study tour in ^{1/}

^{1/} Host country to be decided.