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ECONOMIC COMMISSION FOR EUROPE

TIMBER COMMITTEE

Report of the Eighth Session held at the Palais des Nations from 28 to 31 August

1. The Timber Committee held its eighth session in Geneva from 28 August to 31 August 1951. Representatives of the following countries took part: Austria, Belgium, Canada, Egypt, Finland, France, Italy, Luxembourg, Norway, Netherlands, Sweden, Switzerland, United Kingdom, United States of America, Yugoslavia. Mr. Leloup, Director of the Forestry Division of FAO was present and Mr. D.C. Tait attended as Observer on behalf of the I.L.O.

2. Adoption of Agenda. The Committee adopted the attached agenda as submitted by the Secretariat.

3. Chairmanship. The session was opened by Dr. A. Ceschi (Austria), the outgoing Chairman, who moved the nomination of the new officers. Monsieur M. du Vignaux, Director-General des Eaux et Forêts, France, and Mr. J. Söderhjelm, General Manager, Central Association of Finnish Woodworking Industries, were elected Chairman and Vice-Chairman respectively for the coming year.

4. Sawn softwood. Before attempting to forecast developments in statistical terms, the Committee complied with the Chairman's request to undertake a broad review of the situation and outlook, and each delegate presented a statement dealing with his country's production, consumption, exports and imports of sawn softwood, and giving a personal appraisal of the situation. The usual

worksheets containing estimates for imports and exports in 1951 and 1952 were then filled in and are appended to this report as Tables 1 and 2.

Situation in 1951. European imports and exports of sawn softwood rose in 1951 to a substantially higher level than the average volume of trade during the first four post-war years. Prices have also risen sharply on account of strong demand and the increase in freight rates.

The expansion was checked to some degree by a shortage of shipping space and other physical limitations. The high level of prices, moreover, led in certain countries to buyers' resistance and limited the capacity of importers to finance their timber transactions.

The estimates made during the present session place prospective 1951 imports of sawn softwood, including boxboards, of Europe and the Middle East, as well as the imports of overseas countries from European sources, at 3.64 million standards. The present estimate is roughly 300,000 standards higher than the figure arrived at by the Timber Committee last October, the change being due to a 20% increase in imports of the United Kingdom and to additional purchases of several overseas countries; these are offset to some degree by decreases totalling some 200,000 standards mainly in the imports of western Germany, the Netherlands and Denmark.

The prospective exports of sawn softwood from Europe are estimated at 2.53 to 2.86 million standards; to this figure 715 to 820 thousand standards have to be added for prospective softwood exports from North and South America to Europe, which places the total at 3.24 to 3.68 million standards. These figures are 400,000 to 800,000 standards higher than the maximum export availabilities indicated last October. The increase is due above all to a rise in Canadian shipments to Europe, but also to a substantial increase in exports from Sweden and Finland.

The prospective import figure appears to correspond fairly well with estimated export supplies; hence the European market for sawn softwood during the remainder of 1951 seems to raise no special problems.

Outlook for 1952. Preliminary estimates for 1952 indicate import requirements varying from 3.61 to 3.73 million standards compared with prospective export supplies of 3.15 to 3.63 million standards. In appraising these estimates the following facts should be kept in mind:

(a) Supplies and requirements will be influenced by timber prices. The present high level is reported to discourage timber consumption; it could lead to further substitution if steel and other materials were not in short supply. This price level on the other hand stimulates sawnwood production and exports. If prices were to fall to a lower level, sawmill output might be curtailed.

(b) The output of sawmills which determines export supplies may be impaired by increasing difficulties in securing the necessary sawlogs on account of competition of pulp mills for raw materials. Several delegates drew attention to this competition between sawmills and pulpmills for roundwood and stressed the possibility that sawmill output might fall to lower levels than anticipated, since pulpmills have been able to match the prices which sawmills can pay for sawlogs and even to outbid them.

(c) The maximum export supplies inserted in Table 2, with regard to some countries presume a concurrence of particularly favourable circumstances. These figures should be taken with considerable caution, and the Committee feels that the maximum export figure of 3.63 million standards must be regarded as lying somewhat on the high side.

(d) The estimate for European export supplies includes some 200,000 standards for exports to overseas countries beyond the Mediterranean area. Accordingly, European export supplies (excluding the USSR) available for consumption in Europe and the Mediterranean area are only placed at 2,950 to 3,430 thousand standards. They continue to be below European import requirements, which can only be met by importing the difference from the Soviet Union and from North America and other overseas sources of supply.

(e) Import requirements might have to be revised in the light of subsequent developments. In particular, it is difficult to assess to what extent the defence programmes of several European countries will lead to a curtailment of housebuilding and other activities which usually consume important amounts of softwood, and whether increased requirements for packaging and non-residential construction connected with these programmes will offset the drop in civilian consumption.

Present figures indicate that there is no cause for alarm regarding the European market for sawn softwoods in 1952, and that import requirements of the various countries could be met without major difficulty. However, as the factors just listed may result in significant modifications of present estimates, the Committee believes that it is too early to form a definite opinion about 1952, and feels that it might be advisable to review the situation next spring.

5. Pitprops. During the session consultations were organized between working parties appointed by the Timber and Coal Committees. Table 3 containing estimates resulting from these consultations is attached. The report of the Timber Committee's pitprops working party and the 'Resolution' of the Coal Committee on the Pitwood Situation in 1952 are appended.

These estimates show for 1952 a pitprop deficit of more than 2 million cubic metres, but it is conceivable that actual exports might be somewhat higher than anticipated and thus reduce the size of the gap. Even so, the shortage of pitprops caused by the competing claims for pulpwood has assumed serious proportions and might interfere with the planned increase in coal output in several countries.

The Timber Committee draws the attention of Governments to this critical situation, and recommends that measures be contemplated to increase in the major coal-producing countries the domestic production of pitprops, and in the major wood-exporting countries to give priority to export sales of pitprops. The priority for pitprops constitutes, however, a short-term measure only, and should be limited to the essential requirements of coal-mines which might be revised by the Coal Committee in the light of the present shortage.

The Timber Committee further stresses the need to make pitwood contracts at the earliest possible moment and recommends that Governments encourage and facilitate such transactions.

The Timber Committee believes, on the other hand, that the shortage of small-sized roundwood and the intensive competition for pitprops and pulpwood is not just a temporary phenomenon, but shows indications of becoming increasingly severe.

The Committee therefore decides to include the review of the European pulpwood situation on the Agenda of its next session and instructs the Secretariat to extend the scope of its quarterly timber statistics and bulletins to pulpwood as well. This should enable the Committee to undertake at its future sessions periodic reviews of pulpwood in the same way as this is done with regard to other wood categories.

It further requests the Executive Secretary to study in co-operation with FAO appropriate measures to overcome the growing shortage of small-sized roundwood and to submit these proposals to the Committee in due course. These proposals might also take into consideration the conclusions to be reached in the Study on European timber trends.

6. More rational utilization of Wood. The Committee received a report from its informal working group which met in Paris to define a practical programme with regard to the more rational utilization of wood and expresses the view that, in addition to action to be undertaken by FAO, e.g. with regard to stress grading, pulping of deciduous and tropical woods, logging techniques and equipment, the following projects are worth pursuing on behalf of ECE in the order of priority as set out below:

a) the research of new methods for the utilization of waste from logging operations and forest industries, and of fuelwood.

b) definition of principles for the grading of commercial timbers based on the outward appearance of the timber and its visible qualities and deficits such as knots, shakes etc.

c) the study of problems in connection with the use of wood in packaging including performance tests.

d) increased research and better public information about the utilization of lower grades of timber.

It invites the Executive Secretary to arrange ad hoc consultations of experts with regard to these subjects in close co-operation with FAO and, in particular, with its Committees on Mechanical Wood Technology and Wood Chemistry and to submit progress reports on these four points to future sessions of the Committee. Governments are asked to facilitate progress along these lines by sending qualified experts to the consultations as requested by the Executive Secretary.

7. International Timber Documentation Centre. The Committee reviewed the Secretariat Note - Document TIM/55 - containing proposals for the establishment of an International Timber Documentation Centre. In the Committee's opinion, there exists a need for an international exchange of scientific, technical and industrial information about new techniques and appropriate methods for the production and utilization of wood in all its different forms. It believes that the question of creating a documentation centre serving this purpose deserves the most careful study. The Committee requests the Secretariat:

a) to continue the exploration of this matter by enlisting the advice of qualified experts on the desirability of creating such an international centre and on its organization, financing, objectives and possible location;

b) and suggests that this enquiry take into account the existence of national documentation centres such as the Commonwealth Forestry Bureau at Oxford, the French timber documentation centre at Paris, the Austrian timber documentation centre in Vienna, in order to avoid duplication with existing facilities and that the working of these centres be examined in relation to expressed needs;

c) and that the possibility of financing an international centre serving all nations of Europe by means of the expanded programme of Technical Assistance of United Nations (ETAP) be explored.

8. Training of Wood-working technicians. The Timber Committee expresses its appreciation for the Study prepared by the International Labour Office about European Woodworking Schools and:

a) endorses the suggested improvements on the national level including the increase in the number of technical publications on vocational training in the timber industries, the standardization of certificates of proficiency and the training of teaching staff,

b) expresses itself in favour of the four measures suggested by the report for the intensification of international cooperation in this field, namely:

> regular exchanges of information on vocational training, its organization, development, programmes and methods;
>
> the international exchange or loan of technicians or instructors;
>
> the admission of foreign students to national technical schools;
>
> an increase in the number of trainee exchanges in the industry.

c) stresses that this type of cooperation could greatly increase the productivity in logging operations and forest industries and thus contribute to the economic progress of European countries,

d) requests on behalf of all its members that programmes in accordance with the preceding suggestions be organized in particular within the framework and programme of the Expanded Technical Assistance Programme (ETAP). The Committee invites the Executive Secretary to transmit this request to competent agencies and, in particular, to the Directors-General of FAO and ILO with the suggestion that these programmes be organized as joint projects by FAO, ILO and ECE.

The Committee also urges the Executive Secretary to organize and facilitate as far as possible arrangements between interested countries for the exchange of technicians and teachers in the field of logging operations and wood working.

9. Timber Trends Study. The Committee received with great interest a progress report on the Timber Trends Study and a summary of the conclusions reached to date with regard to trends in European timber consumption. It expressed its satisfaction that this study had been made possible by the joint efforts of FAO and ECE and noted that a first draft of the whole study was likely to be made available at the beginning of 1952. It recommends that the necessary funds for the completion of this study be made available.

Pending the final text, the Committee deferred action both regarding the conclusions emerging from that study and as to possible arrangements for the continuation of this initial effort: it noted, however, the view expressed by the Chairman and supported by several delegates that investigations into the long-term trends of Europe's timber situation might become a permanent feature of the work of the Timber Committee and its Secretariat.

It was decided to draw the attention of FAO to the Study in view of its implications for national forest policies, and for possible consideration by the European Commission on Forestry and Forest Products of FAO at its forthcoming session in October in Rome.

10. Price Indices. The Committee reviewed the Secretariat note on Timber Price Indices and Statistics (TIM/54) and expressed its satisfaction with the progress achieved in this matter.

In accordance with the suggestions submitted by the Secretariat, it recommends:

(a) that countries continue to communicate to the Secretariat all available timber price statistics;

(b) that countries which do not have such statistics take steps in order to arrange regular series which should include in addition to sawn timber and sawlogs, information on pulpwood and pitprops;

(c) that an effort be made to render each of these series uniform and continuous;

(d) that the Executive Secretary convene a group of experts to establish some guiding principles for the establishment of timber price statistics. Such a meeting should be called only after thorough preparation and correspondence with experts in various countries since much of the preliminary work could be achieved in this way;

(e) that the Group of Experts should also advise on methods designed to facilitate international comparisons of timber price trends and levels between various countries and to show, in conjunction with the timber price statistics of each country simultaneous changes in the purchasing power of currencies.

11. Timber statistics. The Committee requests the Secretariat to adjust the presentation of the worksheets of its periodic statistics to recent changes in European timber trade.

The Committee also noted the statistical deficiencies experienced in conjunction with the preparation of the Timber Trends Study and believes that expert consultations should be arranged for the systematic improvement of national timber statistics, with a view to rendering them internationally comparable. The Executive Secretary is requested to take appropriate steps to that effect in consultation with FAO and, where possible, as a joint undertaking of ECE and FAO.

12. Date of next meeting. The date of the next meeting should be set by the Executive Secretary in consultation with the Chairman and the Vice-Chairman. If it is decided to hold a spring meeting, it is desirable that it be held before the 1st May 1952.

ECONOMIC COMMISSION FOR EUROPE

TIMBER COMMITTEE

Agenda
Eighth Session

To be held at the Palais des Nations, Geneva,
From August 28th to September 1st, 1951

1. Adoption of Agenda
2. Election of Chairman and Vice-Chairman
3. Sawn Softwood: Situation and Outlook
   a) Presentation and discussion of national statements.
   b) European balance 1951 and 1952
   c) Conclusions and recommendations
4. Pitprops: Situation and Outlook
5. "More rational utilization of Wood". Discussion of future work in this field.
6. International Timber Documentation Centre.
7. European Wood-working Schools
8. Timber Trends Study (progress report)
9. Price Indices (progress report)
10. Other business.

ECE TIMBER COMMITTEE
EIGHTH SESSION
TABLE No.1

COMITE DU BOIS CEE
HUITIEME SESSION
TABLEAU No.1

A Imports of Sawn Softwood (incl. Boxboards and Timber Equivalent of Sawlogs)

A Importations de Sciages Resineux (Y compris les parties de caisse et les Grumes Exprimes en Sciages)

(in thousands of standards)

(en millier de standards)

Principally Importing Countries	Imports - Importations			Imports requirements in 1951 Besoins d'importations en 1951		Imports requirements in 1952 Besoins d'importations en 1952		Principaux Pays Importateurs
	1937	1950	January to June 1951 Janvier à Juin 1951	Eff. demand as estimated in October 1950 Demande eff. estimée en Octobre 1950	Eff. demand revised in August 1951 Demande eff. revisée en Août 1951	Eff. demand estimated in August 1951 Demande eff. estimée en Août 1951	Maximum imports estimated in August 1951 Importations max. estimées en Août 1951	
1	2	3	4	5	6	7 (Normal)	8 (Maximum)	
Belgium (275)	(i) 190.0	160.0	52.0	150.0	(v) 140.0	(v) 150.0	(v) 160.0	Belgique
Denmark	171.0	230.0	(iii) 58.0	(iv) 175.0	150.0	175.0	180.0	Danemark
France (475)	(i) 190.0	75.0	18.0	125.0	125.0	86.0	86.0	France
Germany : Western Zones	731.0	153.0	52.0	330.0	230.0	300.0	350.0	Allemagne : Zones occidentales
Germany : Eastern Zone	..	..	..	..	..	..	..	Allemagne : Zone orientale
Greece	70.0	75.0	..	(80.0)	(80.0)	(80.0)	(80.0)	Grèce
Hungary	192.0	..	..	(25.0)	(50.0)	(60.0)	(60.0)	Hongrie
Ireland	80.0	79.0	..	(80.0)	(80.0)	(80.0)	(80.0)	Irelande
Italy	312.0	256.0	109.0	250.0	270.0	290.0	300.0	Italie
Luxembourg	8.0	5.0	2.0	(8.0)	(v)	(v)	(v)	Luxembourg
Netherlands	374.0	453.0	186.0	390.0	337.0	305.0	305.0	Pays-Bas
Portugal	..	2.0		(5.0)	(5.0)	(5.0)	(5.0)	Portugal
Switzerland	41.0	25.0	15.0	30.0	35.0	45.0	50.0	Suisse
Turkey	5.0	14.0	..	(20.0)	(25.0)	(25.0)	(25.0)	Turquie
United Kingdom	2366.0	816.0	576.0	1250.0	1500.0	1400.0	1400.0	Royaume Uni
Other European Countries	..	..	..	..	..	..	..	Autres Pays Europeens
Other countries normally exporting	(200.0)	(200.0)	(60.0)	(200.0)	(120.0)	(120.0)	(120.0)	Autres pays normalement exportateurs
SUB-TOTAL A	4930.0	2543.0	1128.0	3118.0	3147.0	3121.0	3201.0	SOUS-TOTAL A
Egypt	98.0	(iii) 122.0	50.0	(	130.0	130.0	150.0	Egypte
French North Africa	60.0	(	54.0	(	110.0	110.0	130.0	Afrique Du Nord Francaise
Iraq	14.0	(	(	(	(	(	(	Irak
Israel	(ii) 54.0	((140.0)	..	((200.0)	((50.0)	((50.0)	((50.0)	Israel
Lebanon		(	(	(	(	(	(	Liban
Syria		(	(	(	(	(	(	Syrie
Other Middle-Eastern and African countries	..	..	..	..	..	..	..	Autres pays du Moyen-Orient et de l'Afrique
SUB-TOTAL B	226.0	162.0	104.0	200.0	290.0	290.0	330.0	SOUS-TOTAL B
Other overseas countries not mentioned above	..	145.0	..	..	205.0	200.0	200.0	Pays d'outre-mer non mentionnes ci-dessus
SUB-TOTAL C	-	145.0	-	-	205.0	200.0	200.0	SOUS-TOTAL C
GRAND TOTAL	5156.0	2950.0	1232.0	3318.0	3642.0	3611.0	3731.0	TOTAL GÉNÉRAL

- SEE OVER -

- NOTES AU VERSO -

Footnotes:

(i) The average figure for imports in 1918-32 was 475.0 for France and 275.0 for Belgium

(ii) Palestine within its 1937 frontiers

(iii) Only sawn-wood

(iv) If the licences are continued, imports amount to 175.0, if discontinued to 200.0

(v) Figures for Belgium include those of Luxembourg

General Remarks:

Estimated figures are in brackets

.. = not available

- = no imports

All figures have been rounded off to the nearest final digit.

Notes:

(i) La moyenne des importations pour la periods 1918-32 été de 475.0 pour la France, et 275.0 pour la Belgique

(ii) Palestine - Frontieres de 1937

(iii) Les sciages seulement

(iv) Si les licences sont maintenues les importations s'élèveront à 175.0, si elles sont supprimées à 200.0

(v) Le Luxembourg est inclus dans les chiffres de la Belgique

Remarque Generale:

Les chiffres estimes sont entre parentheses

.. = chiffres non disponibles

- = pas d'importations

Les données ont été arrondies au dernier chiffre significatif

ECE TIMBER COMMITTEE
EIGHTH SESSION
TABLE No.2

COMITE DE BOIS CEE
HUITIEME SESSION
TABLEAU No.2

B. Exports of Sawn Softwood
(incl. Boxboards and Timber Equivalent of Sawlogs)

B. Exportations de Sciages Resineux
(Y compris les parties de caisse et les Grumes exprimées en sciages)

(in thousands of standards)

(en milliers de standards)

Principally Exporting Countries	Exports - Exportations			Exports prospects for 1951 Previsions d'exportations pour 1951				Exports prospects for 1952 Previsions d'exportations pour 1952		Principaux Pays Exportateurs
	1937	1950	January to June 1951 Janvier à Juin 1951	Normal	Maximum	Normal	Maximum	Normal	Maximum	
				Estimated in October 1950 Estimées en octobre 1950		Revised in August 1951 Revisées en août 1951		Estimated in August 1951 Estimées en août 1951		
1	2	3	4	5	6	7	8	9	10	
Austria	317.0	488.0	274.0	311.0	428.0	432.0	561.0	454.0	605.0	Autriche
Czechoslovakia	176.0	..	..	(25.0)	(25.0)	(25.0)	(25.0)	(25.0)	(25.0)	Tchècoslovaquie
Finland	1045.0	727.0	251.0	550.0	650.0	725.0	750.0	700.0	750.0	Finlande
France	..	160.0	80.0	10.0	20.0	80.0	95.0	20.0	25.0	France
Germany, Western Zones	..	81.0	21.0	(5.0)	(5.0)	25.0	30.0	20.0	25.0	Allemagne: Zones occidentales
Germany, Eastern Zone	..	..	..	..	..	..	..	..	..	Allemagne: Zone Orientale
Norway	51.0	28.0	8.0	15.0	15.0	(10.0)	(15.0)	(10.0)	(15.0)	Norvège
Poland	334.0	..	..	(65.0)	(65.0)	(40.0)	(50.0)	(25.0)	(35.0)	Pologne
Portugal	..	17.0	..	(35.0)	(35.0)	(20.0)	(20.0)	(20.0)	(20.0)	Portugal
Rumania	353.0	..	..	(30.0)	(30.0)	(40.0)	(40.0)	(40.0)	(40.0)	Roumanie
Sweden	820.0	791.0	283.0	650.0	700.0	800.0	875.0	800.0	800.0	Suède
Yugoslavia	197.0	158.0	..	60.0	160.0	130.0	160.0	120.0	140.0	Yougoslavie
U.S.S.R.	1362.0	..	..	(240.0)	(240.0)	(200.0)	(240.0)	(200.0)	(300.0)	U.R.S.S.
Sub-total	4655.0	2450.0	917.0	1996.0	2373.0	2527.0	2861.0	2434.0	2780.0	Sous-total
Canada	508.0	(1) 149.0	(1) (2) 46.0	(300.0)	(300.0)	475.0	550.0	475.0	550.0	Canada
U.S.A.	110.0	(1) 41.0	..	(75.0)	(100.0)	140.0	150.0	140.0	150.0	U.S.A.
Other sources	..	..	..	(100.0)	(100.0)	(100.0)	(120.0)	(100.0)	(150.0)	Autres provenances
TOTAL	5273.0	2640.0	963.0	2471.0	2873.0	3242.0	3681.0	3149.0	3630.0	TOTAL

- SEE OVER -

- NOTES AU VERSO -

General Remark:

Estimated figures are in brackets.

All figures have been rounded off to the nearest final digit.

Symbols employed:

.. = not available.
- = no exports.

Footnotes:

(1) Only to Europe.

Total Exports: Canada 1734.0
U.S.A. 214.0

(2) Canada, total exports for the period January-June 879.0

Remarque Générale:

Les chiffres estimés sont entre parenthèses.

Les données ont été arrondies au dernier chiffre significatif.

Explications des signes:

.. = Chiffres non disponibles.
- = pas d'exportations.

Notes:

(1) Vers l'Europe seulement.

Exportations totales: Canada 1734.0
Etats Unis 214.0

(2) Exportations totales du Canada pour la periode janvier-juin 879.0

30 August 1951

REPORT OF WORKING PARTY ON PITPROPS

Eighth session - Timber Committee

Import requirements for 1951 substantially exceed the 1950 imports, and the deficit between import requirements and estimated export availabilities for 1951 is about 700,000 cu. m. Although this quantity represents only 5% of total and 17% of import requirements, it must be regarded seriously in view of the low current stock levels.

Reduced imports in 1950 already resulted in a decline in stocks in the main European pitprops consuming countries of about 1 million cu.m. During 1951 stocks have shown a further steady fall. Indigenous production of pitprops in 1951 is likely to be lower than in 1950.

The increase in import requirements in 1951, compared with 1950, provides therefore for no overall increase in stocks, but represents only essential requirements. Stocks in Belgium, which decreased by about 150,000 cu.m. in 1950 are expected to fall by a further 300,000 cu.m. by the end of 1951. In France, including the Saar, stocks decreased by about 270,000 cu.m. in 1950 and a further fall of about 700,000 cu.m. is expected by the end of 1951. Western German stocks decreased during 1950 by about 120,000 cu.m. and in the United Kingdom by some 500,000 cu.m. In general, total stocks which at the beginning of 1951 were at the unusually low level of about 4.7 million cu.m. in the main consuming countries (Belgium, France, Saar, Western Germany, Italy, Netherlands, United Kingdom) are expected by the end of 1951 to be at about 4.4 million cu.m.

Considering the present low stock position, any further fall is likely to lead to serious difficulties in 1952.

The pitprops requirements for 1952 estimated at about 5.7 million cu.m. are some 1.5 million cu.m. higher than for 1951. The deficit shown for 1952 of about 2.2 million cu.m., 14% of total and 39% of import requirements, includes

some 750,000 cu.m. increase in stocks: 400,000 in the United Kingdom 300,000 in Belgium and 50,000 in the Netherlands. The remaining 1.5 million cu.m. represents requirements essential to the coal production envisaged. Therefore, unless additional supplies can be found, the European coal production target will be endangered by lack of pitprops, and this may seriously affect industry.

It should be noted, however, that the forward estimates of export availabilities are customarily made cautiously and the final exports therefore are likely to be rather higher than indicated. The reduced availabilities in 1951 were undoubtedly the result of the strong pulp competition. As European export availabilities of small-sized industrial roundwood have usually fluctuated around 6 million cu.m., the heavy diversion into pulpmills had an adverse effect on pitprops supplies. Pulp industries, in some of the pulpwood importing countries now appear better stocked for 1951/52 and it may be expected that the demand for pulpwood from these countries will be somewhat less than in 1951. Even so, the total quantity of small-sized industrial roundwood in Europe needed for 1952 is likely to be more than the customary availabilities, and even if the import demand for pulpwood in 1952 is only half the 1951 level, the small-sized industrial roundwood needed to meet import requirements of European countries would be at least 7½ million cu.m. If the demand for pulpwood in 1952 shows no perceptible decline, the quantities needed would be around 9 million cu.m. This definitely appears unattainable unless unusually large quantities become available from countries like U.S.S.R., Canada and U.S.A.

The present situation is clearly potentially dangerous and the coal industries cannot survive without loss of coal production, a repetition in 1952 of the restricted supply position experienced, e.g., in 1950. Everything depends upon the developments in the pulpwood demand which, if continued at the 1951 level, inevitably means serious difficulties in pitprop supplies.

The Pitprop Working Group hesitates to recommend an international allocation system which may have a restrictive effect upon the development of supplies from unusual sources.

The Pitprop Working Group therefore feels that it can only impress upon

Governments the urgency of the present position and leave individual consuming countries to take all possible measures in the utilization of home production, the placing of early contracts to encourage pitprop production in producing countries and general economy in consumption, as well as the development of supplies in unusual sources and the utilization whenever practicable of hardwoods to relieve the situation.

If pulpwood competition continues on present lines Governments will have to consider whether priority of need in small-sized industrial roundwood supplies is to be given to coal industries or to the pulp industries.

ECONOMIC COMMISSION FOR EUROPE

COAL COMMITTEE

RESOLUTION ON THE PITWOOD SITUATION IN 1952

Adopted by the Coal Committee at its Twentieth Session, 31st August 1951

The Coal Committee

1. DRAWS ATTENTION to the serious situation likely to be created by the considerable deficit of pitwood anticipated for the year 1952 and to the adverse effect on coal production, and consequently on the coal and coke export programme, if the pitwood requirements of coal producing countries cannot be met.

2. DRAWS ATTENTION to the importance to the European economy of maintaining and increasing the present level of coal production, and in that connection:

EMPHASIZES that the import requirements of pitwood estimated at 5/5.5 million solid cubic metres for 1952 represent the essential import requirement for coal producing countries, bearing in mind the necessity to maintain stocks of pitwood at an adequate level.

3. DRAWS THE ATTENTION of the coal producing countries:

(a) to the urgent need for such effective economies in pitwood consumption as can be made without endangering the safe working of the mines;

(b) to the desirability of a wider use of steel pitprops;

(c) to the advisability of reviewing their purchasing policy, e.g., in the direction of placing early contracts and exploring the possibilities of obtaining pitwood from extra-European sources.

4. CONSIDERS that the measures which may be taken by the coal producing countries can contribute in only a limited way to overcoming a pitwood shortage in 1952 and that more fruitful results could be obtained if pitwood producing countries would endeavour to increase their pitwood production and export programmes to meet the pitwood import requirements for 1952.

5. INVITES the Timber Committee to request the pitwood producing countries, in the interests of maintaining the coal production programmes for 1952, to take immediate steps to promote the production of pitprops and to give some priority to the release of timber for that purpose.

6. REQUESTS the Timber Committee, when preparing its study on the general timber situation and the relation between the production, imports and exports of pitwood, pulpwood and possibly sawnwood, to give special consideration to the measures which might be taken to alleviate the pitwood shortage.

ECE TIMBER COMMITTEE

Eighth Session
Table No. 3

COMITÉ DU BOIS CEE

Huitième Session
Tableau No. 3

FORECAST OF PRODUCTION, EXPORTS AND IMPORTS OF PITPROPS FOR 1951 AND 1952

PREVISIONS DES PRODUCTIONS, EXPORTATIONS ET IMPORTATIONS DE BOIS DE MINES POUR L'ANNEE 1951 ET 1952

In thousands of cubic metres

En milliers de mètres cubes

COUNTRIES	Production 1950	1950		1951						1952				PAYS
		Effective imports in 1950 / Importations effectives en 1950	Effective exports in 1950 / Exportations effectives en 1950	Normal requirements in 1951, revised in August 1951 / Besoins normaux en 1951, revisés en août 1951	Indigenous production in 1950, revised in August 1951 / Production nationale en 1951, revisée en août 1951	Effective imports January - June 1951 / Importations effectives janvier - juin 1951	Estimated imports requirements for 1951 (Rev. in August 1951) / Estimations des besoins d'importations pour 1950 (Rev. en août 1951)	Effective exports January - June 1951 / Exportations effectives janvier-juin 1951	Estimated exports possibilities for 1951 (Rev. in August 1951) / Estimations des possibilités d'exportations pour 1951 (Rev. en août 1951)	Normal requirements estimated in August 1951 / Besoins normaux estimés en août 1951	Estimated indigenous production estimated in August 1951 / Production nationale estimée en août 1951	Imports requirements estimated in August 1951 / Besoins d'importations estimés en août 1951	Exports possibilities estimated in August 1951 / Possibilités d'exportations estimées en août 1951	
1	2	3	4	5	6	7	8	9	10	11	12	13	14	
Austria	305.1	-	95.0	223	403	-	-	35.0	180	234	354	-	120	Autriche
Belgium	(1) 815.0	199.0	27.0	1,150	725	59.0	350	14.0	75	1,440	725	790	75	Belgique
Czechoslovakia	..	..	..	(700)	(730)	..	-	..	(30)	(700)	(730)	-	(30)	Tchécoslovaquie
Finland	869.0	-	869.0	-	850	-	-	131.0	850	-	700	-	700	Finlande
France (x)	(2)2,100.0	300.0	185.0	2,850	2,140	48.0	200	180.0	200	3,020	2,520	500	-	France (x)
Germany:														Allemagne:
Western zones	2,930.0	112.0	361.0	3,500	2,900	47.0	700	60.0	100	3,500	2,600	950	50	Zones occidentales
Eastern zone	..	..	..		(3) (300)	..	-	..	(3) (300)	..	(3) (250)	..	(3) (250)	Zone oriental
Ireland	..	-	15.0	(2)	(14)	..	-	..	(12)	(2)	(14)	..	(12)	Irlande
Italy	111.0	6.0	-	150	125	7.0	25	-		212	125	87	-	Italie
Luxembourg	70.0	17.0	135.0	10	60	2.0	(4)	41.0	(4)	10	40	(4)	(4)	Luxembourg
Netherlands	92.0	61.0	-	250	90	-	140	-	-	300	90	210	-	Pays-Bas
Norway	50.0	-	50.0		50	-		16.0	(50)		(25)		(25)	Norvège
Poland	..	..	..	(2,066)	(1,816)	..	(350)	..	(100)	(2,066)	(1,816)	(350)	(100)	Pologne
Portugal	..	-	72.0	(40)	240	..	-	..	(200)	(40)	(260)	-	(220)	Portugal
Sweden	268.0	*	243.0	25	340	-	-	108.0	315	25	325	-	300	Suède
Switzerland	-	-	-	-		-	-	-	1	-	2	-	2	Suisse
Turkey	83.0	132.0	-	(203)	(68)		(135)		-	(203)	(68)	(135)	-	Turquie
United Kingdom	643.0	1,560.0	-	2,900	630	465.0	2,270	-	-	3,338	678	2,660	-	Royaume-Uni
U.S.S.R.	..	..	..	..	(600)	..	-	..	(600)		(700)		(700)	U.R.S.S.
Yugoslavia	622.0	-	114.0	..	34	..	-	..	34		-		-	Yougoslavie
TOTAL EUROPE	8,958.0	2,387.0	2,166.0	17,069	12,115	628.0	4,170	585.0	3,047	15,090	12,022	5,682	2,584	TOTAL EUROPE
Canada	(2) 365.0	-	62.0	-	300	-		12.0	300	-	(750)	-	(750)	Canada
U.S.A.	..	-	-	..	(100)	..	..	..	(100)	..	..	..		U.S.A.
Other countries	..	..	..	..	..	..	..	..	..	..	(170)	..	(170)	Autres pays
TOTAL	9.323.1	2,387.0	2,228.0	17,069	12,515	628.0	4,170	597.0	3,447	15,090	12,942	5,688	3,504	TOTAL
BALANCE									+ 723				+ 2,184	BALANCE

- See over -

- Notes au verso -

GENERAL REMARK: Estimated figures are in brackets.
All figures have been rounded off to the nearest final digit.

SYMBOLS EMPLOYED: .. = Not available.
- = No production, stocks, exports, imports, etc.

FOOTNOTES:

(x) Including the Saar
(1) Includes Pulpwood
(2) Preliminary figures
(3) Export possibilities to Western Germany only
(4) Included in figures for Belgium

REMARQUE GENERALE: Les chiffres estimés sont entre parenthèses.
Les données ont été arrondies au dernier chiffre significatif.

EXPLICATION DES SIGNES: .. = Chiffres non disponibles
- = Pas de production, de stocks, d'exportations, d'importations, etc.

NOTES:

(x) La Sarre incluse
(1) Y compris les bois pour pâtes
(2) Données provisoires
(3) Les possibilités d'exportation vers l'Allemagne occidentale seulement
(4) Inclus dans les chiffres pour la Belgique