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ECONOMIC COMMISSION FOR EUROPE

TIMBER COMMITTEE

Report of the Ninth Session held at the Palais des Nations from 2 to 6 May 1952

1. The Timber Committee held its ninth session in Geneva from May 2nd to 6th 1952. Representatives of the following countries took part: Austria, Belgium, Canada, Egypt, Finland, France, Greece, Italy, Norway, Netherlands, Poland, Sweden, Switzerland, United Kingdom, United States of America, and Yugoslavia. Experts from Western Zones of Germany were under the terms of reference of the Commission in attendance and took part in the discussions.

The Food and Agriculture Organization was represented by Sir Herbert Broadley, Deputy Director-General, and Mr. Marcel Leloup, Director of the Forestry Division. Mr. Owen Sangar, Chairman of the F.A.O. European Commission on Forestry and Forest Products was also in attendance.

2. Chairmanship. The outgoing Chairman, Mr. F.M. du Vignaux (France) and Vice-Chairman, Mr. J.O. Söderhjelm (Finland) were re-elected for the current year by acclamation.

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

4. The Session was opened with the attached statement by the Executive Secretary of ECE. Mr. Myrdal drew the attention of delegates to the decisions of the Seventh Session of the Economic Commission for Europe with regard to intra-European trade and increased production of newsprint and printing papers, and to their implications for the work of the Timber Committee. These recommendations were noted by the delegates who decided to consider them in conjunction with the items on the Committee's Agenda to which they referred.

5. Sawn Softwood. The Committee heard statements from each delegation about the European sawn softwood situation and outlook, of which condensed versions are contained in the summary record. It then reviewed the statistical situation and filled in the usual worksheets appended to this report as Tables 1 and 2.

a) Results 1951. Preliminary trade statistics show that roughly 3.5 million standards of sawn softwood (including the equivalent of sawlogs) were imported in 1951 by the countries of Europe, the Middle East, and by overseas countries from European sources. This increase of 550,000 standards over 1950 is almost entirely due to the United Kingdom, which received 850,000 standards more sawn timber than during the previous year, while most of the other importing countries in western and southern Europe imported somewhat smaller quantities than in 1950. European imports during 1951 thus came within 5% of the import demand which the Timber Committee had estimated in August 1951 at 3.64 million standards.

Also, European exports of sawn softwood reached a post-war record with 2.93 million standards, involving an increase of 300,000 standards over 1950. This rise was achieved by increased shipments from Finland, Sweden and Austria. Exports from Canada and the United States to European countries attained 630,000 standards compared to 190,000 standards during 1950. All these exports were closely in line with the Committee's August estimates.

b) Situation in 1952.* In the eight months since the Committee's last session, the European timber market has undergone a complete change, and import requirements for the current year have fallen substantially below the estimates made last August.

Prospective import demand from Europe, the Middle East, and from overseas countries (as far as European softwoods are concerned) is now placed at 2.8 to 3 million standards, representing a reduction of 500 to 650,000 standards below actual imports in 1951 and corresponding approximately to the level of imports in 1950. A slight downward revision of previous estimates occurred with regard to most importing countries both in Europe and abroad, with the exception of Western Germany, the Netherlands and France; the most significant reduction, however, concerns the United Kingdom, which has decided to limit this year's imports to 920,000 standards or some 700,000 standards less than in 1951. Currency

* Figures given under this item do not include sawlogs.

shortages are the cause of the change in Britain's import plans. The other importing countries report buyers' resistance to the high level reached by timber prices in 1951, and substitution of other materials for timber which tends to reduce its consumption. As a result, contracts for 1952 shipment have been delayed and covered on May 1st an unusually low proportion of the year's expected transactions.

Export prospects reported by the major European producing countries have also undergone a substantial downward revision, especially for Sweden and Finland. The combined sawn timber availabilities of these two countries are now placed around 1.1 million standards compared to approximately 1.5 million standards indicated last August; the reasons for this change are a decline in sawnwood production due to high raw material prices last autumn and a sharp reduction in the operations of small sawmills. No reduction in shipments to Europe below last August's plans is reported from Canada and the United States and it was indicated that the expected reduction of Canadian sales to the United States would probably leave additional quantities available for exports to other parts of the world. The total export availabilities for 1952 are now placed at 2.65 to 3 million standards, or 440 to 800,000 standards below last year's exports.

The Committee noted that the contemplated reduction in exports was in line with the drop in import requirements and that available supplies now appear to correspond closely to prospective import needs. There is thus no prospect of any major shortage or surplus in 1952. Subsequent developments might, however, result in further changes and reveal the possibility of slightly larger exports to meet eventual increases in demand. On the other hand, the delay in purchases is likely to limit shipping possibilities during the current season.

c) Outlook for 1953.* The Committee felt that the present market situation contained so many uncertain elements that it would be premature at this time to formulate estimates for Europe's timber trade in 1953. There was general agreement that next year's import demand for sawn softwood was likely to be larger than in 1952. These expectations are based primarily on the fact that several importing countries may have to draw on their stocks to meet consumption requirements during the current year. Moreover, the exceptionally late conclusion of contracts will

* Figures given under this item do not include sawlogs.

probably limit shipments in 1952 below their normal level, and might leave some unfilled import demands toward the end of the year to be covered in 1953. The possibility of a restriction in consumption would however have to be borne in mind.

Exporting countries, on the other hand, stressed the fact that recent market developments tend to discourage full saw mill production and might stand in the way of an expansion of export supplies in 1953 substantially above present levels should such a need arise.

Delegations undertook to supply the Secretariat with estimates of import requirements and export supplies for 1953 as soon as possible and endeavour to do so in time to provide producers and the timber trade with this important information before the annual sales of standing timber and other roundwood.

The Committee submits these conclusions and, in particular, the estimates contained in Tables 1 and 2 to the Executive Secretary in compliance with the Commission's request. The Delegate of Poland informed the Committee of his country's export availabilities for Western Europe for timber of various descriptions in 1952 and 1953 but was unable to provide a breakdown by categories at this stage. The Soviet Union, Czechoslovakia and Rumania were not represented at the meeting; however, figures for the prospective exports from these four countries in 1952 were included in the tables as estimates made by the Committee. In this way, the tables thus contain an overall appraisal of Europe's import requirements and export supplies of sawn softwood as judged by the Timber Committee at this stage.

6. Softwood Logs. Worksheets covering this item were prepared by the Secretariat in accordance with the Committee's instructions. It was decided, however, not to fill in these sheets since several delegations did not have the necessary statistics and also in view of the uncertainty regarding the customs classification for softwood logs, which frequently include other industrial roundwood such as telegraph poles and masts. The Secretariat is requested to submit these worksheets again to the next session of the Committee at which time it is planned to consider future requirements and supplies of softwood logs.

7. Pitprops. The situation revealed by the usual review of import requirements and export availabilities for 1952 shows a very considerable improvement compared with the dangerous situation envisaged at the 8th session of the Committee in

August last year.* This change is mainly due to the substantial development of production in the Western Hemisphere, as well as the stimulation of European supplies by the high price level and by early contracting for 1952 delivery by the principal importing countries (in spite of very difficult market conditions) as strongly recommended by the Timber Committee and the Coal Committee last August.

The figures for 1952 show a deficit of 415,000 cu.m. representing less than 3% of requirements. As the requirement figures include provision for the replenishment of stocks, and availabilities are based very largely upon existing contracts, and as there are prospects of some additional supplies becoming available later in the year if the present easing of the demand for pulping purposes continues, it seems therefore that for several importing countries there should now be no difficulty in pitprop supplies this year and that stocks are likely to improve from the very low levels reached at the end of 1951.

For 1953 a deficit of 808,000 cu.m. representing 6.5% of requirements is shown. These provisional estimates naturally at this early stage are made very cautiously, particularly on the availability side, and it is felt that something nearer a balance eventually will be achieved, especially if the exceptional large scale pulpwood purchasing of 1950/1951 is not resumed. With the present prospect of increased stocks in some countries at the beginning of 1953 no alarm is felt at this stage about the general pitprops supply prospects for 1953. However, much will depend as usual upon developments in the pulp market and especially upon the timing and the policy of the importing countries in their pitprop purchasing arrangements, as the stimulating effect of early contracting upon the volume of production has been clearly demonstrated this year.

8. Pulpwood. The Committee noted the resolutions of the Economic and Social Council and of the Seventh Session of ECE concerning the production and distribution of newsprint and printing paper. Delegates were unanimous in stressing the improvement in the over-all supply situation for wood pulp and its various products that has taken place since last autumn, and therefore concluded that for the short term the relation between supply and requirements for various pulp products

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* In the case of the United Kingdom, recent experience had shown that the minimum required level of stock was much lower than had previously been contemplated.

appeared sufficiently satisfactory to warrant no further action by the Committee at this stage. Several delegates stressed the decline in pulp and paper prices as an indication that the shortage experienced last year had now been overcome.

The Committee's discussions also revealed that several European countries, in particular Finland, Austria, and Western Germany* are engaged in carrying out rather substantial expansion of their pulp and paper capacity, and that increased supplies of European wood pulp and its products can be expected to become available a few years hence when the new or enlarged mills come into full operation.

The Committee also reviewed the European pulpwood situation and prospects for 1952 and 1953 and the information presented by the Delegations in the course of the debate is contained in the summary record. A worksheet about European production requirements and trade in pulpwood was filled in during the meeting and the results are contained in Table 4 appended to this report. Most delegations stressed that the figures for 1953 are preliminary estimates and should be treated with considerable caution. The major conclusion emerging from Table 4 is that Europe's import requirements of pulpwood in 1952 are now placed at approximately 5.24 million cubic metres compared to export possibilities of 3.85 million cu.m.

In this particular field there seems to exist a deficit even now; the overall roundwood and timber situation however inspires confidence that the gap will be filled this year. On the other hand, plans for additional pulp capacity in Finland and other countries now exporting substantial quantities of pulpwood are likely to curtail their export availabilities increasingly in coming years. Thus pulpwood-deficit countries may have difficulty in meeting their needs unless they succeed in raising domestic supplies of pulpable materials through increased use of hardwoods, wood waste and other fibrous materials. However, it was pointed out that the major shortage at present arises in connection with spruce and fir needed for the manufacture of mechanical and sulphite pulps.

The discussions revealed that the term "pulpwood" requires clarification, and that there exists an increasing trend to meet the raw material requirements of Europe's pulp industry, not only from round pulpwood, both coniferous and non-coniferous, but also from other wood categories. The Secretariat was therefore instructed to re-design the worksheets and its tables dealing with pulpwood, and to provide space for showing a breakdown of production and consumption of raw

* Sulphate pulp only.

materials for pulping into such major categories as coniferous pulpwood, non-coniferous pulpwood, sawlogs, wood waste, fuelwood, etc. These details will, however, be requested only for past and the current years, and will not apply to forecasts. The amended forms will be circulated as soon as possible to participating Governments with a request to supplement the information supplied during the present session wherever possible by July 1st. The results of these replies should then be immediately circulated by the Secretariat.

9. Timber Trends Study. The Committee received from the Secretariat a further progress report summarising the Study's Parts II and III dealing with trends in Europe's timber production and timber trade. It noted with satisfaction that the analysis of the material had now been practically completed and decided to take up the Study for consideration at the next session of the Committee. To this effect the Tenth Session of the Timber Committee should be so organized as to permit a joint session of the Timber Committee and of the European Commission on Forestry and Forest Products of F.A.O.

First drafts of Parts I and II of the Study were distributed to Delegates during the session, and the Secretariat announced its intention to distribute drafts of Part III of the Study during the summer.

Delegates were requested to send their comments on Parts I and II if possible before July 1st and on Part III by August 15th. The Secretariat suggested that these comments might refer to corrections of facts and the communication of additional material since the analysis of the material and the formulation of conclusions is to be undertaken on the responsibility of the Secretariat and without committing the Timber Committee or its Member governments. The present text should be regarded as a confidential working paper communicated to delegates in their personal capacity. While Delegates should feel free to consult any individuals they may choose, they were requested to make sure that no part of the present text of the Study be used directly or indirectly for publication, and that any public discussion of the Study be postponed until after its official release. It is intended to print the Study and its statistical appendix before the end of the year, and it is hoped that galley proofs can be made available to Delegates shortly before the next session.

10. Technical Questions. Progress reports were presented and noted on:

a) Timber Price Statistics and Indices

b) Research on New Methods for Utilization of Wood Waste

c) Logging Techniques

d) Other projects (Definition of principles of the grading of commercial timber, Study of problems in connection with the use of wood in packaging, including performance tests, and the Training of Wood-Working technicians).

The Secretariat was invited to pursue work on these projects and other technical questions, and to keep the Committee informed about the result of these efforts.

The Committee noted with special appreciation the progress achieved in the field of timber price statistics. It considered that the further development of these statistics, together with their presentation in graphic form would be useful for the future work of the Committee.

11. The Committee reviewed ECE's work programme and priorities with regard to timber as contained in document TIM/61, and approved the proposals contained in that document.

12. Next Session of the Committee. The convening of the next session is left as usual to the Executive Secretary in consultation with the Chairman and Vice-Chairman. Delegates noted that according to present plans the next session would be called to Geneva for the week beginning November 17th. Arrangements will be made with F.A.O. for joint consideration of the Timber Trends Study and of timber statistics.

The British Delegation reaffirmed its view that in future years there should only be one session of the Timber Committee, to be held in the autumn of each year. A decision on this matter will be taken at the next session.

TABLE No. 1

A Imports of Sawn Softwood — A Importations de Sciages résineux

In thousands of standards — En milliers de standards

Principally Importing Countries	Including Boxboards & Timber Equivalent of Sawlogs — Y compris parties de caisses & grumes exprimées en sciages: IMPORTS IMPORTATIONS 1937	IMPORTS IMPORTATIONS 1951	Imports requirements in : Besoins d'importations en : 1951 — Eff. demand revised in August 1951 — Demande eff. revisée en Août 1951	1952 Normal — Estimates made in : Estimations faites en: August - Août 1951	1952 Maximum	Including Boxboards only — Y compris les parties de caisses seulement: IMPORTS IMPORTATIONS 1951	Imports requirements in : Besoins d'importations en : 1952 Normal — Estimates made in May 1952 Estimates faites en mai 1952	1952 Maximum	Principaux Pays Importateurs
1	2	3	4	5	6	7	8	9	
Belgium (275)	a) 190	c) 126	c) 140	c) 150	c) 160	c) 118	c) 130	c) 140	Belgique (275)
Denmark	171	163	150	175	180	163	120	120	Danemark
France (475)	a) 190	55	125	86	86	52	82	112	France (475)
Germany Western	731	174	230	300	350	172	300	350	Allemagne occidentale
Germany Eastern	..	..	..	..	..	..	..	..	Allemagne orientale
Greece	70	63	(80)	(80)	(80)	59	(80)	(80)	Grèce
Hungary	192	..	(50)	(60)	(60)	..	(30)	(30)	Hongrie
Ireland	80	78	(80)	(80)	(80)	77	(80)	(80)	Irelande
Italy	312	215	270	290	300	198	220	250	Italie
Luxembourg	8	d)	d)	d)	d)	d)	d)	d)	Luxembourg
Netherlands	374	400	337	305	305	378	k) 306	k) 306	Pays-Bas
Portugal	..	..	(5)	(5)	(5)	..	(5)	(5)	Portugal
Switzerland	41	28	35	45	50	19	20	25	Suisse
Turkey	5	11	(25)	(25)	(25)	11	(20)	(25)	Turquie
United Kingdom	2 366	1 659	1 500	1 400	1 400	1 640	920	920	Royaume-Uni
Other european countries	..	e) 6	..	..	..	e) 6	(10)	(10)	Autres pays européens
Other countries normally exporting	(200)	f) 176	(120)	(120)	(120)	f) 110	(120)	(120)	Autres pays normalement exportateurs
SUB-TOTAL A	4 930	3 154	3 147	3 121	3 201	3 003	2 443	2 573	SOUS-TOTAL A
Egypt	98	g) 134	130	130	150	132	132	140	Egypte
French North Africa	60	h) 67	110	110	130	h) 64	110	120	Afrique du Nord française
Iraq	14	..	(	(	(	..	(	(	Irak
Israël	b) 54	g) i) 51	((50)	((50)	((50)	i) 47	((50)	((60)	Israël
Lebanon		..	(	(	(	..	(	(	Liban
Syria		..	(	(	(	..	(	(	Syrie
Other Middle-Eastern and African countries	..	..	..	..	..	..			Autres pays du Moyen-Orient et de l'Afrique
SUB-TOTAL B	226	252	290	290	330	243	292	320	SOUS-TOTAL B
Other overseas countries not mentioned above	..	j) 220	205	200	200	j) 218	(100)	(100)	Autres pays d'outre-mer non mentionnés ci-dessus
SUB-TOTAL C	..	220	205	200	200	218	100	100	SOUS-TOTAL C
GRAND TOTAL	5 156	3 626	3 642	3 611	3 731	3 464	2 835	2 993	TOTAL GENERAL

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TABLE No. 1

a) The average figure for imports in 1918-32 was 475 for France and 275 for Belgium.

b) Palestine within its 1937 frontiers.

c) Includes figures for Luxembourg.

d) Included with figures for Belgium

e) Iceland.

f) Austria/Finland/Norway/Sweden and figures given by exporting countries for USSR/Czechoslovakia/Poland.

g) Includes hardwood logs.

h) Imports from France only.

i) Includes sleepers.

j) USA/Latin America/Union of South Africa/Australia/Others. Imports from Europe. Figures given by exporting countries.

k) Includes timber equivalent of sawlogs.

General remark :

Estimated figures are in brackets.

.. = Not available.

- = No imports.

Figures have been rounded off to the nearest final digit.

a) La moyenne des importations pour la période 1918-32 était de 475 pour la France et 275 pour la Belgique.

b) Palestine, frontières de 1937.

c) Y compris les chiffres du Luxembourg.

d) Compris dans les chiffres de la Belgique.

e) Islande.

f) Autriche/Finlande/Norvège/Suède et des chiffres fournis par les pays exportateurs pour l'URSS/Tchécoslovaquie/Pologne.

g) Y compris les grumes de feuillus.

h) Importations en provenance de la France seulement.

i) Y compris les traverses.

j) USA/Amérique latine/Union Sud-Africaine/Australie/Autres. Importations en provenance d'Europe. Chiffres fournis par les pays exportateurs.

k) Y compris les grumes exprimées en sciages.

Remarque générale :

Les chiffres estimés sont entre parenthèses.

.. = Non disponibles.

- = Pas d'importations.

Les données ont été arrondies au dernier chiffre significatif.

TABLE No. 2

C Exports of Sawn Softwood

C Exportations de Sciages résineux

In thousands of standards

En milliers de standards

Principally Exporting Countries	Including Boxboards & Timber Equivalent of Sawlogs / Y compris les parties de caisses et grumes exprimées en sciages						Including Boxboards only / Y compris les parties de caisses seulement			Principaux Pays Exportateurs
	EXPORTS / EXPORTATIONS		Exports prospects for : / Prévisions d'exportations pour :				EXPORTS / EXPORTATIONS	Exports prospects for : / Prévisions d'exportations pour :		
			1951		1952			1952		
			Normal	Maximum	Normal	Maximum		Normal	Maximum	
	1937	1951	Revised in August 1951 / Revisées en août 1951		Estimated in August 1951 / Estimées en août 1951		1951	Estimates made in May 1952 / Estimations faites en mai 1952		
1	2	3	4	5	6	7	8	9	10	
Austria	317	519	432	561	454	605	516	437	548	Autriche
Czechoslovakia	176	a) 22	(25)	(25)	(25)	(25)	a) 21	(30)	(35)	Tchécoslovaquie
Finland	1 045	924	725	750	700	750	838	530	550	Finlande
France	..	204	80	95	20	25	186	86	86	France
Germany Western	..	29	25	30	20	25	24	15	20	Allemagne occident.
Germany Eastern	..	a) *	..	..	..	..	a) *	..	..	Allemagne orientale
Norway	51	28	(10)	(15)	(10)	(15)	27	10	15	Norvège
Poland	334	a) 18	(40)	(50)	(25)	(35)	a) 18	d) (25)	d) (35)	Pologne
Portugal	..	a) 7	(20)	(20)	(20)	(20)	a) 7	(10)	(10)	Portugal
Roumania	353	a) *	(40)	(40)	(40)	(40)	a) *	(50)	(50)	Roumanie
Sweden	820	912	800	875	800	800	908	550	550	Suède
Yugoslavia	197	135	130	160	120	140	135	100	120	Yougoslavie
U.S.S.R.	1 362	a) 131	(200)	(240)	(200)	(300)	a) 131	100	150	U.R.S.S.
SUB-TOTAL	4 655	2 929	2 527	2 861	2 434	2 780	2 811	1943	2169	SOUS-TOTAL
Canada	508	b) 487	475	550	475	550	c) 487	550	600	Canada
U.S.A.	110	e) 146	140	150	140	150	e) 145	140	200	U.S.A.
Other sources	..	..	(100)	(120)	(100)	(150)	..	(20)	(30)	Autres provenances
TOTAL	5 273	3 562	3 242	3 681	3 149	3 630	3 443	2653	2999	TOTAL

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- NOTES AU VERSO -

TABLE No. 2

a) To Western Europe only. Figures given by importing countries

b) Exports to Europe only. Total exports : 1808.

c) Exports to Europe only. Total exports : 1799

d) Committee estimate based on an indication given by the Polish delegate that 500,000 m^3 of sawnwood, pulpwood and pitprops will be available for export.

e) To Europe only

General remark :

Estimated figures are in brackets.

.. = Not available.

- = No exports.

* = Less than half-a-unit.

Figures have been rounded off to the nearest final digit.

a) Vers l'Europe occidentale seulement. Chiffres fournis par les pays importateurs.

b) Vers l'Europe seulement. Exportations totales : 1808.

c) Vers l'Europe seulement. Exportations totales : 1799.

d) Estimation du Comité basée sur les indications du délégué Polonais d'après lesquelles 500.000 m^3 de sciages, bois de pâte et bois de mine seront disponibles à l'exportation.

e) Vers l'Europe seulement

Remarque générale :

Les chiffres estimés sont entre parenthèses.

.. = Non disponibles.

- = Pas d'exportations.

* = Moins d'une demi-unité.

Les données ont été arrondies au dernier chiffre significatif.

TABLE No. 3

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TABLEAU No. 3

FORECAST OF PRODUCTION, EXPORTS & IMPORTS OF PITPROPS FOR 1952 AND 1953

PREVISIONS DE LA PRODUCTION, DES EXPORTATIONS ET DES IMPORTATIONS DE BOIS DE MINE POUR LES ANNEES 1952 ET 1953

In thousands of cubic meters

En milliers de mètres cubes

COUNTRIES	1951			1952								1953				PAYS
	Production	Imports Importations	Exports Exportations	Normal requirements Besoins normaux		Indigenous production Production nationale		Imports requirements Besoins d'importations		Exports possibilities Possibilités d'exportations		Normal requirements Besoins normaux	Indigenous production Production nationale	Imports requirements Besoins d'importations	Exports possibilities Possibilités d'exportations	
						Estimated in: Estimés en:										
				August Août 1951	May Mai 1952	August Août 1951	May Mai 1952	August Août 1951	May Mai 1952	August Août 1951	May Mai 1952	Estimated in May 1952 Estimés en Mai 1952				
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	
Austria	289	-	66	234	245	354	395	-	-	120	150	250	380	-	130	Autriche
Belgium	800	b) 372	b) 54	1 440	b) 1 150	725	b) 800	b) 790	b) 420	b) 75	b) 75	b) 1 050	b) 800	b) 325	b) 75	Belgique
Czechoslovakia	..	c) -	c) 8	(700)	..	(730)	a) (30)	-	..	(30)	i) (30)	..	a) (30)	..	i) (30)	Tchécoslovaquie
Finland	a) 1 122	-	1 122	-	-	700	1 500	-	-	700	1 500	-	900	-	900	Finlande
France	2 100	140	349	g) 3 020	3 020	g) 2 520	2 520	g) 500	500	g) -	-	3 300	2 600	700	-	France
Germany: Western	3 504	58	122	3 500	3 500	2 600	2 600	950	950	50	50	(3 600)	(2 600)	(1 000)	-	Allemagne: occidentale
Germany: Eastern	(1 000)	c) -	e) 17	..	..	h) (250)	a) (100)	..	..	h) (250)	i) (100)	..	a) (100)	..	i) (100)	Allemagne: orientale
Ireland	(14)	-	14	(2)	(2)	(14)	(14)	-	-	(12)	(12)	(2)	(14)	-	(12)	Irlande
Italy	135	10	1	212	217	125	125	87	87	-	-	150	150	-	-	Italie
Luxembourg	78	d)	d)	10	d)	40	d)	d)	d)	d)	d)	d)	d)	d)	d)	Luxembourg
Netherlands	108	105	2	300	240	90	100	210	150	-	-	240	100	150	-	Pays-Bas
Norway	60	-	65	-	-	(25)	100	-	-	(25)	100	-	75	-	75	Norvège
Poland	(1 800)	c) 21	e) 3	(2 066)	..	(1 816)	a) (100)	(350)	..	(100)	i)j) (100)	..	a) (100)	..	i) (100)	Pologne
Portugal	(240)	c) -	e) 121	(40)	(40)	(260)	(290)	-	-	(220)	(250)	(40)	(240)	-	(200)	Portugal
Sweden	342	*	317	25	25	325	825	-	-	300	800	25	425	-	(400)	Suède
Switzerland	-	-	-	-	-	2	10	-	-	2	10	-	10	-	10	Suisse
Turkey	109	134	-	(203)	(205)	(68)	(70)	(135)	(135)	-	-	(205)	(70)	(135)	-	Turquie
United Kingdom	634	1 785	-	3 338	3 796	678	676	2 660	3 120	-	-	3 000	700	2 300	-	Royaume-Uni
U.S.S.R.	..	c) -	e) 276	..	..	(700)	a) (400)	..	..	(700)	i) (400)	..	a) (400)	..	i) (400)	U.R.S.S.
Yugoslavia	446	-	23	..	520	-	520	..	-	-	-	520	520	-	-	Yougoslavie
TOTAL EUROPE	12 781	2 625	2 561	15 090	12 960	12 022	11 175	5 682	5 362	2 584	3 577	12 382	10 214	4 610	2 432	TOTAL EUROPE
Canada	543	-	f) 219	-	..	(750)	a) 1 100	-	-	(750)	i) 1 100	-	a) 1 100	-	i) 1 100	Canada
U.S.A.	..	..	e) 43	..	..	..	a) 100	..	..	..	i) 100	..	a) 100	..	i) 100	U.S.A.
Other countries	..	..	..	..	..	(170)	a) (170)	..	..	(170)	i) (170)	..	a) (170)	..	i) (170)	Autres pays
TOTAL	13 324	2 625	2 823	15 090	12 960	12 942	12 545	5 682	5 362	3 504	4 947	12 382	11 584	4 610	3 802	TOTAL
BALANCE										+ 2 178	+ 415				+ 808	BALANCE

SEE OVER

NOTES AU VERSO

TABLE No. 3

a) Production equals exports

b) Includes Luxembourg

c) Imports from Western Europe only. Figures given by exporting countries

d) Included with Belgium

e) Exports to Western Europe only. Figures given by importing countries

f) Total exports to Europe

g) Including the Saar

h) Export possibilities to Western Germany only

i) Exports to Western Europe only

j) Committee estimate based on an indication given by the Polish delegate that 500,000 cu.m. of sawnwood, pulpwood and pitprops will be available for exports.

General remark:

Estimated figures are in brackets

.. = not available

- = none

* = less than half-a-unit

Figures have been rounded off to the nearest digit.

a) Production égal exportations

b) Y compris le Luxembourg

c) Importations en provenance d'Europe occidentale seulement. Chiffres fournis par les pays exportateurs

d) Compris avec la Belgique

e) Exportations vers l'Europe occidentale seulement. Chiffres fournis par les pays importateurs

f) Exportations totales vers l'Europe

g) La Sarre incluse

h) Les possibilités d'exportations vers l'Allemagne occidentale seulement

i) Exportations vers l'Europe occidentale seulement

j) Estimation du Comité basée sur les indications du délégué de la Pologne d'après lesquelles 500,000 m³ de sciages, de bois à pâte et de bois de mine seraient disponibles à l'exportation.

Remarque générale:

Les chiffres estimés sont entre parenthèses

.. = non disponible

- = néant

* = moins d'une demi-unité

Les chiffres ont été arrondis au dernier chiffre significatif.

TABLE No 4.

E/ECE/TIM/42
TABLEAU No. 4

FORECAST OF PRODUCTION, EXPORTS & IMPORTS OF PULPWOOD FOR 1952 and 1953

PREVISIONS DE LA PRODUCTION, DES EXPORTATIONS ET DES IMPORTATIONS DE BOIS A PATE POUR LES ANNEES 1952 ET 1953

In thousands of cubic metres — en milliers de mètres cubes

COUNTRIES	1937 Production (A)	1937 Imports Importations (A)	1937 Exports Exportations (A)	1950 Production (B)	1950 Imports Importations	1950 Exports Exportations	1951 Production	1951 Imports Importations	1951 Exports Exportations	1952 Requirements Besoins	1952 Indigenous production Production nationale	1952 Imports requirements Besoins d'importations	1952 Exports possibilities Possibilités d'exportations	1953 Requirements Besoins	1953 Indigenous production Production nationale	1953 Imports requirements Besoins d'importations	1953 Exports possibilities Possibilités d'exportations	PAYS
										Estimated in May 1952 - Estimés en mai 1952								
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	
Austria	2.030	*	528	b) 1.153	87	*	1.455	158	-	2 000	1.455	100	-	2.000	1.350	120	-	Autriche
Belgium	50	i) 241	i) *	c) 150	i) 219	i) 2	(200)	i)184	i) 10	350	i) 200	i) 160	i) 10	350	i) 200	i) 160	i) 10	Belgique
Bulgaria	*	-	-	(10)	j) -	n) -	(10)	j) -	n) -	..	..	..	..	..	..	..	..	Bulgarie
Czechoslovakia	2.300	131	526	d) 1.760	j) 8	n) 19	d) (1 760)	j) 6	n) 21	..	..	..	(20)	..	..	..	(20)	Tchécoslovaquie
Denmark	20	-	-	2	-	-	-	-	-	15	15	-	-	15	15	-	-	Denemark
Finland	9.690	*	3540	e) 8.300	-	1.882	(11.500)	-	3.496	8.500	11.000	-	2.500	(9.000)	(10.000)	-	(1.000)	Finlande
France	470	849	*	c) 720	161	18	(1.630)	523	17	2.000	1.500	600	100	2.100	1.600	500	-	France
Germany Western	)5.080	)3.326	) -	f) 1.674	638	133	(2.320)	1.253	13	4.200	2.400	1.800	-	4.600	2.800	1.800	-	Allemagne occid.
Germany Eastern	)	)	)	(2.090)	j) 5	n) 5	(2.090)	j) 13	n) -	..	..	..	..	..	..	..	..	Allemagne orien.
Ireland	-	-	-	-	..	-	-	3	-	..	..	..	-	..	..	..	-	Irlande
Italy	200	266	-	g) 253	355	1	(470)	529	*	1.030	400	630	-	1.100	470	630	-	Italie
Hungary	-	(469)	*	(*)	j) 1	n) -	(*)	j) 32	n) -	..	..	(30)	..	..	..	(30)	..	Hongrie
Luxembourg	-	k)	k)	-	k)	k)	-	k)	k)	-	k)	k)	k)	-	k)	k)	k)	Luxembourg
Netherlands	-	311	-	-	234	-	22	438	*	275	25	250	-	275	25	250	-	Pays-Bas
Norway	3.760	573	14	c) 3.070	217	2	(3.800)	648	9	4.150	4.300	150	300	3.975	4.100	150	275	Norvège
Poland	1.200	-	273	(1.500)	j) 10	n)102	(1.500)	j) -	n) 157	..	..	..	h)(100)	..	..	..	(100)	Pologne
Portugal	40	-	*	53	j) -	n) -	(53)	j) -	n) -	..	..	..	..	..	..	..	..	Portugal
Roumania	(200)	-	34	(200)	j) -	n) -	(200)	j) -	n) 7	..	..	..	(10)	..	..	..	(10)	Roumanie
Sweden	16.700	292	119	9.500	490	255	12.650	745	169	13.900	13.500	500	100	(12.900)	(12.600)	(400)	(100)	Suède
Switzerland	180	123	-	c) 250	34	o) 13	(300)	407	-	600	275	325	-	600	275	325	-	Suisse
Turkey	30	-	-	68	-	-	(25)	6	-	..	..	..	..	..	..	..	..	Turquie
United Kingdom	*	720	-	c) 14	238	-	(115)	313	-	543	115	428	-	543	115	428	-	Royaume-Uni
U.S.S.R.	q)(7.000)	q) 15	q)3.299	..	j) 188	n) 44	..	j)283	n) 1	..	..	(250)	..	..	..	(250)	..	U.R.S.S.
Yugoslavia	800	-	-	(500)	-	446	(450)	-	396	270	670	-	400	310	710	-	400	Yougoslavie
TOTAL EUROPE	49.750	7.316	8.333	31.267	2.885	2.922	40.550	5.541	4.296	37.833	35.855	5.223	3.540	37.768	34.260	5.043	1.915	TOTAL EUROPE
Canada	19.980	..	183	c)30.971	L) -	p) 93	..	L) -	p) 763	..	..	..	285	..	..	..	300	Canada
U.S.A.	11.000	..	*	45.737	-	*	..	*	n) 4	..	..	..	25	..	..	..	50	Etats Unis
Other countries	..	...	..	..	m) 12	..	..	m) 16	..	r) 17	..	r) 17	..	r) 17	..	r) 17	..	Autres pays
TOTAL	80.730	7.316	8.516	107.975	2.897	3.015	..	5.557	5.063	37.850	35.855	5.240	3.850	37.785	34.260	5.060	2.265	TOTAL
BALANCE													+ 1390				+ 2795	BALANCE

A) Source: European Timber Trends Study

B) Source: Yearbook of Forest Products Statistics - 1951

b) Includes wood for charcoal and distillation

c) Estimated figure

d) Planned average 1949-1953

e) Year 1950/1951

f) Forestry year

g) Year 1949/1950

h) Committee estimate based on an indication given by the Polish delegate that 500 000 cu.m. of sawnwood, pulpwood and pitprops will be available for exports

i) Includes Luxembourg

j) Imports from Western Europe only. Figures given by exporting countries

k) Included with Belgium

L) From Europe only. Total imports: 1950:81 - 1951:119

m) Egypt - from Europe only. Total imports: 1950:12
1951:17

n) Exports to Western Europe only. Figures given by importing countries

o) Sawmill waste

p) To Europe only. Total exports: 1950:4424
1951:7322

q) Includes Baltic States

r) Egypt only

General Remark:

Estimated figures are in brackets
.. = not available
- = None
* = less than half-a-unit
Figures have been rounded off to the nearest digit

TABLE N° 4

A) Source: Etude des tendances du marché européen du Bois

B) Source: Annuaire statistique des produits forestiers - 1951

b) Y compris le bois pour la carbonisation et la distillation

c) Chiffre estimé

d) Moyenne prévue pour 1949-1953

e) Année 1950/51

f) Année forestière

g) Année 1949/50

h) Estimation du Comité basée sur les indications du délégué de la Pologne d'après lesquelles 500 000 m3 de sciages, de bois à pâte et de bois de mine seraient disponibles à l'exportation

i) Y compris le Luxembourg

j) Importations en provenance de l'Europe occidentale seulement. Chiffres fournis par les pays exportateurs

k) Compris avec la Belgique

L) En provenance d'Europe seulement. Importations totales: 1950:81 - 1951:119

m) Egypte - en provenance d'Europe seulement. Importations totales: 1950:12
1951:17

n) Exportations vers l'Europe occidentale seulement. Chiffres fournis par les pays importateurs

o) Déchets de scieries

p) Vers l'Europe seulement. Exportations totales: 1950:4424
1951:7322

q) Y compris les Etats Baltes

r) Egypte seulement

Remarques générales:

Les chiffres estimés sont entre parenthèses
.. = non disponible
- = néant
* = moins d'une demi-unité
Les chiffres ont été arrondis au dernier chiffre significatif

ANNEX I

STATEMENT OF MR. GUNNAR MYRDAL, EXECUTIVE SECRETARY OF THE UNITED NATIONS ECONOMIC COMMISSION FOR EUROPE

at the opening of the ninth session of the ECE Timber Committee, on 2 May 1952

Mr. Chairman :

Welcoming the delegates of the Timber Committee to their regular sessions is among my most pleasant duties during the year. I believe you were wise in selecting this moment for your session. It tends to show that already eight months ago many of you anticipated the somewhat difficult situation through which European timber trade is passing right now.

The market is indeed strikingly different from what it was last Spring. At that time everybody was talking about shortages of timber and wood pulp, and the rapid rise in prices caused by these shortages. Today, stocks in producers' hands are rising, and fears are even being expressed of a fall in consumption and the emergence of a surplus. It is therefore important that your Committee should meet at this very moment, because I hope that it will be able to tell the world that there is no reason to get too excited about these fluctuations.

As long as I can remember following Europe's timber trade, I have noticed that frequent ups and downs are one of its most characteristic features. During the recent post-war years, these changes were somewhat less noticeable, but I am sure that many of the delegates in this room feel with me that last year's boom and the present delay in sales have very much the aspect of what many people like to regard as the "good old times" of more normal international trade. These fluctuations, of course, have many disturbing effects both for producers and consumers. However, it is through these fluctuations and their sometimes burdening effect that a reasonably free economy exercises its corrective influence, and ensures that developments, including prices, do not go too much out of line.

For an international body that enjoys the standing, and carries the responsibility of your Committee, it is important not to lose sight of the big and basic trends, irrespective of temporary fluctuations. This was as you know my main reason for suggesting the preparation of the Timber Trends Study, and I am happy

that your Secretariat will be able to submit to this Session another progress report, and the first draft of this Study, which has at last been completed, at least in a preliminary stage. I very much hope that forthwith this Study will facilitate the work of your Committee, and provide information and perspectives to help you in formulating your conclusions and recommendations.

In looking over the Study, I was rather struck, and to some extent surprised, by three important facts : 1) Although Europe's supposed timber trade is still one-third below pre-war level, consumption of sawn softwood was only one million standards, or about 10%, lower in 1950 than in 1937. This reduction in turn is due to two countries : the United Kingdom and Germany, where consumption is down by two million standards, while all other European countries have maintained, and even increased, their softwood consumption, and thus used 6½ million standards in 1950 against not quite 5½ million standards in the best pre-war years. Contrary to what is frequently believed, we are thus not faced in any way with a general decline in Europe's timber consumption, since the low present consumption in both Germany and the United Kingdom is due to rather special circumstances.

2) Post-war recovery of Europe's production of sawn softwood has been quite encouraging. Leaving aside the Soviet Union, Europe's output of sawn softwood was already slightly larger in 1950 than in the best pre-war year, and has risen, as you know, even a few per cent higher in 1951.

3) The reduction in supplies available to Europe's importing countries can be traced almost entirely to the heavy fall in exports from the Soviet Union.

Since a preliminary consideration of the Timber Trends Study forms part of your agenda, I do not want to go further into that subject. I have mentioned these facts, however, because they tend to indicate to me that as long as Soviet exports remain at their present low level, there can be no real softwood surplus in Europe. Moreover additional supplies will be increasingly required to meet Europe's timber needs and in that connection the USSR is for many reasons the most logical source. These facts underline rather strikingly the importance and desirability of increased East-West trade for Europe's timber economy.

The present session has been called primarily to review the market situation and outlook for three important forest products : Sawn softwood, pitprops and pulpwood. In this connection I would like to report to you that the recent session of the Commission reached two important decisions, which I am certain you will bear

in mind in the course of your deliberations.

The first deals with newsprint and printing paper. As most of you know, the Economic and Social Council last August was quite disturbed about the world paper shortage, and its undesirable social effects. It called on various specialized agencies, but also on the regional economic commissions, to assist in efforts designed to overcome these shortages, both in the short-term and in the long run. When the Economic Commission for Europe took up the matter, it decided to refer it for fuller consideration primarily to your Committee.

We know, of course, that since last Summer the overall supply situation for wood pulp and its products has been greatly eased. But again, these short-term adjustments do not change the fundamental fact that supplies are wholly inadequate to restore and raise consumption to desired levels. I, therefore, want to convey to you the Commission's hope that your Committee will be able to make practical suggestions as to what European governments could do individually and in co-operation to facilitate the achievement of more satisfactory consumption levels of newsprint and printing papers, not just in Europe, but all over the world where many countries continue to depend heavily on European supplies.

The second directive issued by the Commission deals with East-West Trade and relates, practically speaking, to all of your work. Our repeated efforts in the field of intra-European trade have been blocked primarily by the present political tension. However, in our trade discussions, we have also found that the general experts on international trade participating in these meetings have some difficulty in discussing matters relating to such important commodities as timber or other forest products, which require a considerable degree of specialized knowledge. The technical committees have, therefore, been asked by the Commission to review supplies and needs in their respective fields, and to prepare reports which might constitute most helpful elements in achieving practical progress, if and when consultations in the general field of intra-European trade are resumed. Your report should constitute in that connection a particularly significant contribution, first because of the outstanding present and potential importance of forest products in East-West trade, and secondly, because your Committee has succeeded in developing excellent methods of reviewing, at regular intervals, European requirements and supplies for all major forest products. The question as to how the importing

countries should pay for increased supplies of various forest products from the East is, of course, important but I am fully aware that it would be difficult to ask the Committee to consider what counterpart deliveries could be made available; that is not within your terms of reference. However, in the light of several years' experience, I am satisfied that any real success in expanding East-West trade can be achieved only if we proceed step by step. A business-like discussion of counterpart deliveries requires in the first instance reasonably precise information about the amounts of sawn timber, pulpwood, pitprops or any other forest products, which the importing countries need to buy from the East, and which the East could supply, because such information will give us an indispensable indication of the order of magnitude of the counterpart problem.

Since the Soviet Delegation took a most active part in the discussion both during the Commission's latest Session and in the working parties which prepared the final text of the resolutions just mentioned, I was hoping that delegates from the Soviet Union, and other traditionally wood-exporting countries of Eastern Europe, would attend the present session of your Committee. I even made a point of mentioning and stressing the need for such attendance in several of my statements to the Commission, and I have followed this up in special communications to Moscow and other capitals. I am happy to inform you that an expert delegate from Poland, which for several sessions has not been represented in the Timber Committee, will arrive tonight, and I hope that this constitutes a first step toward fuller Eastern participation in this and other Committees. It is, indeed, indispensable that the countries which, at the Commission sessions and even elsewhere, manifest particular interest in East-West trade, and which urge the committees and the Secretariat to tackle these problems, should follow up their interest by taking an active part in the Committees and by helping them to prepare the ground for the results sought by unanimous resolutions.

However, I am confident that the absence of some countries from this meeting will not prevent you from making your usual overall appraisal of Europe's requirements and prospective supplies, with regard to each of the three commodities that will come up for consideration during the next few days. I am looking forward to receiving your report for use later in the year when I will have to consider the advisability of resuming my consultations with governments and experts on East-West trade.

The short remarks which I have just taken the liberty to make show that once again you are beginning a session which has important business on its agenda. I feel that the usefulness of this meeting might well go beyond the things that are said officially in the Committee room. I am happy to see around this table many old friends, and am as usual impressed by the fact that the delegates assembled today represent, in the very real sense of the word, the major importing and exporting interests in Europe's timber trade, both government and business interests. Your presence in Geneva, and your discussions at the meetings and in the couloirs, will therefore provide you with an exceptionally useful opportunity to clarify the issues which have been troubling the men who produce wood in various forms, who sell it and who buy it, and who so far have not been able to agree on a common view regarding this year's market. Such a view is necessary, or at least desirable, as a basis for doing business on a large scale. This little stalemate should and could be broken. I trust that your present gathering will be able to make a significant and practical contribution also in that direction.

ANNEX II

LIST OF DELEGATES

AUSTRIA

M.Anton Ceschi, Conseiller Aulique
M. Rudolf Kindl, Conseil fédéral du bois

BELGIUM

M. Gustave M. de Winter, Directeur au Ministère des Affaires Economiques
M. Marcel H.F. Maelfeyt, Secrétaire Général de la Fédération Belge du Commerce d'Importation de Bois
M. F. de Kerchove d'Exaerde, Délégué Permanent auprès de l'Office Européen des Nations Unies

CANADA

Observer: Mr.Douglas Roe, Commercial Secretary (Timber Specialist)

DENMARK

Mr. Hans Erik Kastoft, Permanent Delegate to E.C.E.

EGYPT

Mr. Abd el Aty, Attaché Commercial, Légation Royale d'Egypte, Berne
Mr. Moustafa El Khodari, Attaché Commercial d'Egypt, Berne.

FINLAND

Mr. J.O.Söderhjelm, General Manager, Central Association of Finnish Woodworking Industries
Mr. Olli J. Vallila, Permanent Delegate to E.C.E.

FRANCE

M. Merveilleux du Vignaux, Directeur-Général des Eaux et Forêts
M. Jean-Pierre Lévy, Directeur des Industries Diverses et des Textiles au Ministère de l'Industrie et du Commerce
M. Paul Rodary, Chef du Service Economique, Direction Générale des Eaux et Forêts
M. Henri Léon Véron, Chef de la Division du Bois au Ministère de l'Industrie et de l'Energie
M. Hubert A.D. Blétry, Chef de Bureau, Ministère des Affaires Economiques, Direction des Relations Economiques Extérieures
M. Bernard Toussaint, Délégué permanent auprès de l'Office européen des Nations Unies

GREECE

M. Nicolas Hadji Vassiliou, Délégué Permanent auprès des Organisations Internationales à Genève.

ITALY	M. Giuseppe Favia, Inspecteur Général, Ministère de l'Industrie et du Commerce M. Luigi Funiciello, Inspecteur Supérieur Forestier, Ministère de l'Agriculture et des Forêts M. Beniamino Miozzi, Chef de Division, Ministère du Commerce Extérieur
NETHERLANDS	Mr. Antoni Kouwenaar, Ministère des Affaires Economiques
NORWAY	Mr. Erling Mykland, Secretary, Landbruksdepartementet
POLAND	Mr. Antoni Lewinski, Commercial Counsellor, Berne Mr. Leon Znamirowski, Director, C.H.Z. "PAGED"
SWEDEN	Mr. Richard B. Hillman, Directeur de l'Association Suèdoise des Exportateurs de Bois Mr. Gösta F.N. Olhammar, Managing Director of the Swedish Forest Owners Association Mr. Torsten Bjoerck, Permanent Delegate to ECE
SWITZERLAND	M. Albert J. Schlatter, Chef de l'Inspection fédérale des Forêts M. Jacques Keller, Inspecteur fédéral des Forêts M. Charles Lanz, Ingénieur Forestier auprès de l'Inspection fédérale des Forêts M. Hans G. Winkelmann, Directeur, Association Suisse d'Economie Forestière
UNITED KINGDOM	Mr. J.C. Rea Price, Ministry of Materials Mr. George E. Hampson, Head of Timber Branch, National Coal Board
	Mr. Franz Eidmann, Düsseldorf Mr. Fritz Bockemühl, Bonn Mr. Eduard Kmonitzek, Bonn Mr. F. Neef, Bonn
UNITED STATES	Mr. Paul O. Gendelman, Industrial Resources Division, MSA, Paris Mr. Joseph A. Greenwald, Permanent Delegate to ECE Mr. Avery B. Cohan, Permanent Delegate to ECE
YUGOSLAVIA	Mr. Teodor Peleš, Delegate of the Yugoslav Wood Exporters Association, Zurich
F.A.O.	Sir Herbert Broadley, Acting Director-General of FAO Mr. Marcel Leloup, Director, Forestry Division Mr. Owen J. Sangar, Chairman of the European Commission on Forestry and Forest Products.