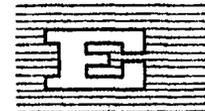


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ECONOMIC COMMISSION FOR EUROPE
Timber Committee

REPORT OF THE TIMBER COMMITTEE ON ITS THIRTIETH SESSION

30 October - 3 November 1972

As approved by the Committee

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Introduction

1. The Timber Committee held its 30th session in Geneva from 30 October to 3 November 1972. It was attended by delegates from Austria, Belgium, Byelorussian SSR, Czechoslovakia, Federal Republic of Germany, Finland, France, Greece, Hungary, Ireland, Italy, Netherlands, Norway, Poland, Portugal, Romania, Spain, Sweden, Switzerland, Turkey, USSR, United Kingdom, United States of America and Yugoslavia. Algeria and Canada participated under Article 11 of the Commission's terms of reference. Representatives of the International Labour Organisation (ILO) and the Food and Agriculture Organization of the United Nations (FAO) also attended. The International Standard Organization (ISO), the International Organization of Employers (IOE), the European Confederation of Wood-working Industries (CEI-Bois), the European Federation of Associations of Particle Board Manufacturers (FESYP), the Fédération Européenne des Industries du Contre-Plaqué (FEIC), the International Federation of Building and Woodworkers and the Organization of European Sawmilling Industries (OES) sent representatives. Staff officials of the Commission of the European Communities attended at the invitation of the Secretariat.
2. The Chairman of the Timber Committee, Mr. N. Dumitrescu (Romania) opened the session and welcomed delegates to the meeting.
3. The Committee honoured the memory of Mr. A. Solbraa, for many years a delegate of Norway to the Committee, who died on 31 October.

Adoption of the Agenda (Item 1 of the Agenda)

4. The Provisional Agenda (E/ECE/TIM/99), presented by the Secretariat, was adopted with one alteration: as plans for the special lecture (Item 12) had not materialized, it was agreed to replace it with a discussion of ECE and the Timber Committee's work over the past 25 years.

Election of officers (Item 2 of the Agenda)

5. The Committee re-elected Mr. N. Dumitrescu (Romania), as Chairman and Mr. A. Madas (Hungary) and Mr. J. Bakker (Netherlands) as Vice-Chairmen.

Twenty-seventh session of the Economic Commission for Europe (Item 3 of the Agenda)

6. The Committee was addressed by Mr. J. Stanovnik, Executive Secretary of the Economic Commission for Europe, who outlined the Commission's priority areas, the Committee's valuable contribution to the Commission's work in the past and the possible directions in which it might evolve in the future.
7. On the basis of TIM/Working Paper No.172, the Committee took note of the resolutions, other decisions and discussions of the 27th session of the Economic Commission for Europe relevant to the work of the Timber Committee.
8. With regard to Decision A (XXVII) on ECE recurrent publications the Committee firmly restated its opinion that the Timber Bulletin for Europe and the Annual Forest Products Market Review were vital and unique sources of information both to governmental agencies and to all concerned with the forest products industry and trade.

9. The Committee agreed to bear carefully in mind the other resolutions and decisions which were relevant to its work, notably Resolution 1 (XXVII) - The work of the Commission as a whole and implementation of priorities, Resolution 2 (XXVII) - Consideration of long-term problems of common interest in the ECE region, Decision B (XXVII) - reports of ECE meetings and Decision G (XXVII) - Standardization, when dealing with other items on its agenda, in particular its long-term programme of work and priorities, 1974 to 1978.

Other matters affecting the work of the Timber Committee (Item 4 of the Agenda)

10. The Committee was informed of the results of the 10th meeting of its Office-holders, held in April 1972 (TIM/Working Paper No.173). It agreed to take up the matters raised at that meeting under the appropriate items of its agenda.

11. The Committee took note of United Nations General Assembly resolution 2836 (XXVI), ECE decision B(XXVII) and the instruction issued by the Executive Secretary of ECE to put these into effect by a reduction in the volume of documentation. In accordance with those objectives it agreed to put into effect on a trial basis the changes in the presentation of its discussions on the market review and prospects in its adopted report which had been proposed by the Office-holders, as set out in TIM/Working Paper No.173, with one modification, namely that a summary table showing the totals of countries' data for 1971 and forecasts for 1972 and 1973 for the main products dealt with should be annexed to the report. It also agreed that a more detailed coverage of its discussions on the market should be made by the Secretariat in the Annual Forest Products Market Review, which should also contain the forecasts submitted to the Committee by individual countries.

Activities of continuing subsidiary bodies (Item 5 of the Agenda)

(a) Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers, 9th session, September 1972: report

12. Mr. K. Voronitsin (USSR), outgoing Chairman of the Joint Committee, introduced the report of its 9th session, which was held in Sopron (Hungary) from 4 to 9 September 1972 and was preceded by a study tour (FAO/ECE/LOG/249). He also informed the Committee about the symposium on forest road construction and maintenance techniques which was held in conjunction with this session. The Committee approved the report of the Joint Committee and warmly thanked the Government of Hungary for the excellent organization of the session, symposium and study tour.

13. The Committee noted the change of Office-holders of the Joint Committee and the Chairmen of the three Study Groups and expressed its warmest thanks to the outgoing Chairman, Mr. K. Voronitsin, for the invaluable work he had accomplished and the important contribution he had made to the Joint Committee's work over the past years.

14. The Committee was informed that the Government of the Federal Republic of Germany had invited the Joint Committee to hold a seminar on the application of ergonomics in forestry work in that country in 1973, and that this seminar will be organized in close collaboration with Austria and the Netherlands. Thanks were extended to the Governments of the above countries for their contribution to this project.

15. The Committee noted with gratitude the invitation by the Government of France to hold the Joint Committee's 10th session, together with a study tour, in that country.

16. Appreciation was expressed for the work carried out by the Joint Committee in the various fields of its activity, which remained one of the more important facets of the Timber Committee's programme; and approval was expressed of its programme of work for 1972-1974.

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

17. The Committee was informed of the preparations for the 9th session of the Working Party, scheduled for late March or April 1973. In taking note of the items to be included in the agenda, the Committee recalled the high priority given by both parent bodies of the Working Party to its project dealing with the evaluation and quantification of indirect benefits of forests. It urged countries that had not yet replied to the Secretariat's enquiry on this subject to do so as soon as possible, so that a report could be prepared and circulated in advance of the session.

18. In response to a delegation's proposal for a new World Forest Inventory, the representative of FAO explained that because of the difficulties experienced in the past in collecting accurate data, FAO had decided to adopt a different approach, namely to undertake forest resource reviews for specific regions or groups of countries. One which had recently been completed covered the temperate-zone regions.

19. After hearing a suggestion that the Working Party should consider collecting production and trade statistics for furniture and joinery, the Committee agreed to await the outcome of the studies on the utilization of forest products in furniture and in doors, windows and related joinery, before taking a decision.

20. The Committee was also informed of the programme for the ad hoc meeting of experts on the classification and definitions of forest products, to be held in Geneva from 15 to 18 January 1973. The Committee urged delegations to ensure that the documentation was circulated to appropriate experts in their respective countries in good time, so that comments could be forwarded to the Secretariat before the meeting. The meeting should bear in mind that the classification and definitions it would consider must be identifiable with those of SITC and BTN, so as to avoid any confusion in the categorization of forest products entering international trade.

Activities of other international bodies relevant to the work of the Timber Committee
(Item 6 of the Agenda)

21. The Committee was informed of the activities of FAO relevant to its work, including the 1st session of the Committee on Forestry, the 13th session of the FAO Advisory Committee on Pulp and Paper, both held in May 1972, and the 7th World Forest Congress, held in Buenos Aires, Argentina, in October 1972 on the theme of "Forests and Socio-Economic Development". Mr. A. Madas (Hungary) testified to the success of the Congress which clearly established both the responsibility of the forester to provide the productive, protective and social goods and services of the forest to society, and the importance of forests and forestry for society as a whole.

22. The Committee was also informed about the 16th session of the FAO European Forestry Commission, held in May 1972, which was particularly concerned with the environmental aspects of forestry, and about the FAO European Regional Conference held in Munich in September 1972.

23. The representative of ILO told the Committee that ILO's 2nd Tripartite Technical Meeting for the Timber Industry (Forestry) was scheduled to be held from 25 April to 8 May 1973. A Tripartite Meeting on the Wood-working Industries was also being proposed for inclusion in ILO's programme for the 1974-75 biennium.
24. A representative of ISO described the scope and method of working of his organization and in particular its activities in the field of timber, including those concerned with sawnwood qualities, sawnwood packaging, sawlog grading and the technical properties of wood-based panels.
25. The Committee's attention was drawn to a study being prepared by the UNCTAD/GATT International Trade Centre on selected import markets for wood-based panels in western Europe and North America. It also took note of the intention of UNIDO to hold an Expert Group Meeting on the Selection of Wood-working Machinery, probably in April 1973, in which the Committee's Secretariat had been invited to participate.

Market review and prospects (Item 7 of the Agenda)

26. The Committee received statements from each delegation on the markets for sawn softwood, hardwoods, wood-based panels, pulpwood, coniferous logs and pitprops, and examined the Secretariat's draft of the annual forest products market review (TIM/Working Paper No.174). It completed the worksheets setting out countries' estimates for 1972 and 1973, the European totals of which are shown in Annex I to this report.
27. Countries' statements confirmed that in western Europe as a whole a gradual upturn in economic activity had been occurring during 1972, although in some of them, including Italy, and in certain sectors, such as capital investment, the recovery had been rather slow and hesitant. A further modest acceleration in economic growth was foreseen by many countries of the region in 1973. Dwelling construction had reached a record high level in 1972 from which, given a number of factors including a probable tightening of credit and higher interest rates, there might be a slight falling back in 1973. In several countries, however, lower dwelling construction activity was expected to be offset by an increase in non-residential building.
28. A similar development in 1973 was also foreseen in the North American construction sector where house building had reached an unprecedentedly high level in 1972. In both the United States of America and Canada the overall economy had grown strongly during 1972 and the rate of economic activity was expected to continue next year.
29. In the United States, measures to slow down the rate of inflation appeared to be succeeding in 1972. In contrast, the still high rate of inflation was a cause for deep concern in virtually all countries of western Europe. In addition, continuing uncertainties in the international monetary sphere were creating problems for the timber trade in Europe.
30. The economic situation outlined above was mirrored by trends in the forest products sector. Consumption of sawnwood and wood-based panels had risen strongly in North America in 1972, easily surpassing previous peak levels, with strong increases in prices for softwood, sawnwood and plywood which had resulted as much from supply difficulties as from the strength of demand. Growth in consumption was however expected to slow

down in 1973. In Europe also, consumption of sawnwood and wood-based panels had risen to new peak levels in the current year although the extent of expansion had been less marked than in North America and had not, generally speaking, been accompanied by strong price increases. Growth in domestic requirements of these products is expected to continue in 1973, although at a slower rate than in 1972. In volume terms the largest increases in European domestic requirements in 1972 and 1973 are forecast for sawn softwood and particle board. The increase for sawn softwood in 1972 over 1971 is estimated to be 1.26 million m³ (1.7%) and in 1973 over 1972 690,000 m³ (0.9%); the corresponding estimated increases for particle board are 1.78 million m³ (12.6%) and 1.34 million m³ (8.5%)

31. For pulpwood and its products, 1972 has witnessed a firmly upward trend in production and consumption in North America, with the prospect of further active growth in 1973. In many parts of Europe, on the other hand, the seriously over-stocked situation in the pulpwood market, dating from the latter part of 1970, still persisted in the autumn of 1972. The supply of pulpwood was, however, gradually coming into better balance with demand while there were signs of a moderate recovery in the woodpulp market which led to expectations of increased intakes of pulpwood by European pulpmills in 1973. Deliveries to the particle board industry would continue to grow actively. The aggregate of countries' forecasts showed an increase in Europe's domestic requirements of pulpwood in 1972 over 1971 of 5.6 million m³ (4.2%) and of 8.7 million m³ (6.2%) in 1973 over 1972.

32. The Committee was informed by the representative of FEIC that in the case of some of the member countries of his association there appeared to be a discrepancy between the official statistics of plywood production as published in the Timber Bulletin for Europe and those collated by the industries themselves. The Committee requested the Secretariat to examine this matter further with FEIC and the countries concerned. It also agreed to the proposal that, in view of the declining importance of the pitprop market, it would be sufficient to follow its development in the medium-term surveys of the markets for pulpwood, pitprops and miscellaneous roundwood and no longer at its annual session.

Medium-term survey of the markets for pulpwood, pitprops and miscellaneous roundwood
(Item 7(f) of the Agenda)

33. The Secretariat presented the draft of the above survey (TIM/Working Paper No.175). The Committee invited delegations to forward any additions or revisions of their countries' forecasts of trends for the period 1971-75, as well as comments on the draft survey to the Secretariat by 30 November 1972. It agreed that, after revision, the survey should be published in a supplement to the Timber Bulletin for Europe.

34. The Committee confirmed that the medium-term survey in 1973 would deal with the wood-based panels sector, including the triennial survey of the structure of these industries and their raw material consumption, to be carried out jointly with FAO.

Transport and handling of forest products (Item 8 of the Agenda)

35. The Committee's co-ordinator, Mr. F. Palmer (United Kingdom), described the effects which the modernization of the middle part of the movement of softwood from forest to consumer was having upon both the production and the distribution ends of the chain of supply (TIM/Working Paper No.176)

36. It noted with satisfaction that the ISO Technical Committee 55 at its meeting in June 1972 had proposed a set of package sizes for sawn softwood which covered those currently accepted by European and Canadian exporters. It stressed the necessity of taking into account the interests of the timber trade in this work and considered that the Committee itself was the appropriate link between the trade and ISO. Furthermore, it considered that such work must be linked with the interests of the end users, particularly in the construction sector, and of the transport industry. It therefore recommended that the closest possible co-ordination should be established between the Timber Committee and ISO, and that ISO should improve the co-ordination of interests and activities of its different bodies which have or may have interests in the standardization of the dimensions of forest products. The Committee also decided that co-ordinators should be appointed to serve as links between the Committee and the different sector committees of ISO. It recognized the important role governments had to play in hastening progress towards standardization, as set out in Commission decision G(XXVII) - Standardization.

37. The Committee noted with interest that the International Sawn Softwood Conference was looking into the possibility of establishing international standards for carcassing timber (structural timber), an initiative which it considered to be most important. The Committee itself would have the opportunity of studying this question further, in co-operation with other competent bodies, at its ad hoc meeting of experts on the international comparability of sawn softwood grading rules, scheduled for autumn 1973 (see paras 50-53).

38. In considering the transport and handling of forest products other than sawn softwood, the Committee took note of the work of FAO on the transportation of chips and bundled pulpwood and requested the Secretariat to explore with FAO how the Committee might contribute to this project. It also agreed to include in its work on transport and handling consideration of the implications of further vertical integration of transport from forest to consumer. With the probable increased shipments of stress graded and finger-jointed timber and end-use components, exporters are likely to participate much more in the final through delivery to end-users.

39. The Committee expressed its profound gratitude to Mr. Palmer for the work accomplished, invited him to add to his tasks the responsibility of maintaining contact with the relevant ISO technical committees, and noted with pleasure the provisional offers of the help of experts who could assist him in this liaison work made by the USSR and the Federal Republic of Germany.

Utilization sector studies (Item 9 of the Agenda)

(a) Wooden railway sleepers

40. Mr. H. Ollmann (Federal Republic of Germany) presented the draft study to the Committee (TIM/Working Paper No. 177). With a decrease in total track length, leading to a fall in the total demand for sleepers, the study foresaw a decline in the number of steel and softwood sleepers in use and an increase in that of concrete sleepers. Technically hardwood was able to compete as a raw material with concrete, especially if its average life span were lengthened by better impregnation techniques and its resistance to mechanical wear improved. The future success of the hardwood sleeper, however, depended on it being economically competitive with the concrete sleeper.

41. Some countries were not in agreement with the conclusion in the draft study that hardwood, and particularly small-sized oak, could find alternative markets if its use for sleepers declined, although they agreed that the problem was less acute for beech.

42. Delegates were asked to send their comments on the draft to the Secretariat before 30 November 1972. Moreover, countries which had not replied to the questionnaire were urged to do so as soon as possible. The Committee warmly thanked Mr. Ollmann for his work and agreed to the publication of the study, after revision, as a supplement to the Timber Bulletin for Europe.

(b) Utilization of forest products in doors, windows and related joinery

(c) Utilization of forest products in furniture

43. The Committee took note of a report on the preparatory phase of work on the above studies (TIM/Working Paper No.178). It was informed of the progress being made in the substantive phase of collation and analysis of information. The Committee stressed the importance it attached to these studies as part of its programme to examine major end-use sectors of forest products. It recognized, however, the complexity of the subjects under study and the problems encountered in obtaining the necessary data and in their appraisal. Because of these problems and the limited resources available for the work, one delegation suggested that the Committee should keep under review the prospects for achieving the original objectives of the studies.

44. The Committee was informed that the study on the utilization of forest products in construction, a draft of which had been submitted to its previous session, had been revised and condensed and would be published shortly in a supplement to the Timber Bulletin for Europe.

Economic aspects of, and productivity in, the wood-processing industries (Item 10 of the Agenda)

(a) Symposium on wood as a competitive and versatile material, January 1972: report (Item 10(a) of the Agenda)

45. The Committee expressed its satisfaction with the results of the above Symposium (TIM/SYMP.1/69 and TIM/Working Paper No.179). It considered that it had drawn attention to the importance of wood and wood products in construction and other applications and to the fields where more attention was needed in order to ensure their most effective

use in the future. The Committee noted that several of the symposium's recommendations including those relating to promotion, market research, education and training and the collection and dissemination of information called for more intensive activity. It invited countries to explore with their appropriate industry and trade circles the degree of interest in giving financial support to such activities at the inter-country level and how these might be related to work carried out at the national level. The results of these discussions should be forwarded to the Secretariat by 31 March 1973, so that they could be considered by the next Office-holders' meeting and subsequently submitted to the Committee's 31st session. It was understood that any proposal for follow-up to the Symposium could not involve the Committee itself in direct promotional activity.

(b) Symposium on co-ordination between forestry and the wood-using industries, May 1972: report

46. The Committee expressed its satisfaction with the results of the above symposium and the study tour which followed it, held in Finland from 23 to 31 May 1972 (TIM/SYMP.2/40). It considered that the symposium had provided a valuable forum in which to discuss various forms of co-ordination and co-operation within the forestry and forest industry sectors. Governmental agencies had an important role to play in creating an economic and political climate which would encourage and facilitate such developments.

47. The Committee gave its broad approval to the report of the symposium and in particular to its conclusions. One delegation, however, expressed a reservation about the statement in paragraph 7 of the symposium's report concerning low net returns on capital in the forestry and wood-using sectors. In the opinion of that delegation, at the root of the problem lay the need for structural change in these sectors, rather than their level of profitability which in any case was extremely difficult to determine.

48. The Committee agreed to take into account the conclusions of the symposium when it came to review its long-term programme of work. It extended to Finland its deep appreciation for the excellent way in which the symposium and study tour had been organized.

(c) Provisional Group of Experts on the Wood-working Industries

(i) Meeting of experts on problems relating to the wood-based panels sector, January 1973: preparations

49. The Committee was informed of the programme of the above meeting, which would be held from 17 to 20 January 1973. It noted that the meeting, the title of which had been changed to "industrial statistics and related matters in the wood-based panels sector", would discuss problems of a highly technical nature. It therefore urged countries to ensure that the documentation for the meeting was passed on in good time to appropriate specialists and that their views should be made known to the meeting. It also considered it very important that international bodies with interests in the field of wood-based panels, including FAO, FESYP, FEROPA, FEIC and ISO, should be suitably represented at the meeting.

(ii) Meeting of experts on the international comparability of grading rules of sawn softwood, first half of 1973

50. The Committee was informed that, partly because the programme of meetings was heavily charged in the first half of 1973, the Secretariat was proposing to postpone the above meeting to the autumn, possibly immediately before or after the Committee's 31st session. Several delegations expressed concern at this proposal in view of the fact that a number of important developments were imminent, notably the issue of the proposed new British standard for the grading of carcassing timber, BS 1860, which had far-reaching implications for the international softwood market. It was pointed out, however, that the purpose of the meeting was to find out the scope and orientation of activities being undertaken by the various bodies dealing with the international comparability of grading rules, rather than to attempt to reach any agreement on it which in any event was likely to be a lengthy process.

51. The importance was stressed of ensuring active governmental participation in this work through the Timber Committee, as well as of ensuring that all interested parties were properly consulted, including the producer, the trade and the consumer.

52. While recognizing that it might involve a temporary postponement of another, less urgent, part of its 1973 programme of work, the Committee, nevertheless, requested the Secretariat to accelerate work on this project and to explore the possibility of bringing together informally a small number of specialists in the early months of 1973, for the purpose of examining the information furnished by countries in response to the Secretariat's enquiry in connexion with the international comparability of grading rules, and of drawing up a programme for the meeting of experts. It appealed to countries to see whether they could nominate a specialist for this task and to advise the Secretariat accordingly as soon as possible.

Study tours and training courses (Item 11 of the Agenda)

(a) Study tour in the Federal Republic of Germany, June 1972

53. The Committee heard a report on the study tour in the Federal Republic of Germany which had taken place from 25 June to 1 July 1972. More than 50 experts from some 15 countries participated in the tour, which had visited forests, including one managed for recreation, as well as forest operations and wood-working industries in Bavaria and Baden-Württemberg. The programme was further complemented by demonstrations of wood-handling equipment and vehicles, as well as by a visit to the site of the Olympic Games where examples of modern uses of wood were shown.

54. The Committee expressed its deep gratitude to the Government of the Federal Republic of Germany for the excellent manner in which the study tour had been organized, for the hospitality offered and for the interesting programme which had been prepared.

(b) Appreciation course on the applications and uses of plywood and blockboard, London, September 1972

55. The Committee received a report on the above course which took place in London, United Kingdom, from 11 to 15 September 1972, and was followed by a three-day study tour. The course had been a considerable success; the lectures presented were of high technical quality and the visits to plywood-using industries, construction sites and research institutes were well chosen and of real practical value.

56. The Committee agreed to bear in mind, when planning future courses of this kind, the comments made by the participants on the London course which suggested that both product-oriented courses, such as the one in London, of a highly technical nature and with a limited participation, as well as end-use-oriented courses were of value. The latter could be of a more general nature, embracing also marketing and economic aspects of utilization. The topic of timber framed structures and engineered timber components was suggested as suitable for an end-use-oriented course.

57. The Committee expressed its deep gratitude to the United Kingdom for the particularly thorough preparation and effective organization of the appreciation course and study tour, also to Canada, Finland and the United States of America, whose plywood associations had also contributed to the success of the course. It noted with pleasure that a timber journal had issued a special supplement containing abbreviated versions of the lectures presented at the course. Since the full papers, including diagrams and pictures would be of considerable interest to all concerned with the utilization of plywood, the Committee requested the Secretariat to explore the possibility of reproducing them in a supplement to the Timber Bulletin for Europe.

(c) Study tour in Czechoslovakia, scheduled for September 1973

58. The Committee was informed by the delegation of Czechoslovakia of the provisional programme for the Timber Committee's 1973 study tour, which will be based on Bratislava and held from 2 to 8 September. The theme of the study tour will be "The processing of hardwoods" and participants will visit forests, wood-working plants and research institutes in the Carpathian mountains. The Committee was informed that the programme would be completed by the end of this year and would be circulated by the Secretariat early in 1973. The number of participants would be limited to 100. It asked countries to ensure that the programme was brought to the attention of potential participants in good time and that registration forms should be sent in to the organizers by the date requested.

Special lecture (Item 1.2 of the Agenda)

59. The Director of the Timber Division presented a review of the long-term trends of the forest economy in the ECE region and of the general situation of the timber industry (TIM/Working Paper No.173/Add.1). He stressed especially that over the past half century wood resources in the region had been expanding, despite increasing removals and consumption, and that wood supply had been much more flexible than had earlier been thought possible. With the present extent of knowledge on the subject, however, no one could foretell what impact environmental factors might have on the wood supplying function of the forest by the end of the century.

60. With regard to the wood industries, considerable concentration of enterprises, mergers and specialization had taken place over the last twenty-five years, with a great number of the smaller firms disappearing. Nevertheless, the wood sector was still, in general terms, a very fragmented one with consequent handicaps. At the same time, however, this handicap had to a large extent been offset by the rapid progress in technology, in which forestry and the wood industries at all stages from silviculture to the ultimate application of the processed product had shared. This had brought about considerable rationalization in the production and utilization of wood and its products.

61. Mr. A. Madas (Hungary), Vice-Chairman of the Committee, reviewed the trends in the world's timber-consumption during the present century and the effect on it of two wars and a major economic depression. These factors had drastically cut timber consumption, but recovery had been remarkably consistent and rapid.

62. The Committee thanked the Director and Mr. Madas warmly for their contributions. Their review of the ECE region's forest economy over the period since the Timber Committee was established in 1947 brought to mind the delegates and members of secretariat, no longer present, who had contributed so much to the development of forestry and the forest industries in general and to the work of the Committee in particular.

Long-term programme of work and priorities, 1974-1978 (Item 13 of the Agenda)

63. In accordance with the Commission resolution 6 (XXVII) - Programme of work of the Commission for 1972/73 and its long-term programme of work for 1973-77, and also taking into account resolution 1 (XXVII) - The work of the Commission as a whole and implementation of priorities, the Committee adopted its programme of work and priorities, 1974-1978, as set out in Annex II (TIM/Working Paper No. 181).

64. The delegation of Austria invited the Committee to hold its 1975 study tour in Austria. The Committee thanked the delegation for this invitation and accepted with gratitude.

65. The Delegation of Norway confirmed that its country was willing to act as host to the Seminar on the manufacture and utilization in construction of mass-produced forest products, to be held jointly with the ECE Committee on Housing, Building and Planning. The Committee recommended that in due course, the wording of the title should be improved. The Committee requested the Secretariat to approach a number of countries with a view to having experts nominated to help in preparing the seminar. As a first step these experts might assist in the meeting of the Housing Committee's Working Party on the Building Industry in January 1973 which would discuss the orientation of the seminar. The preparatory meeting for the seminar would take place early in 1974. The Committee thanked Norway for its offer to act as host and supported its proposal to hold the seminar in June 1975.

66. The Committee thanked Hungary for its offer to act as host for the training course on the uses of particle board and fibreboard and noted that the course would take place in early 1974, in order to give adequate time for thorough preparations. It noted with appreciation the offers of FESYP and FEROPA to assist in the course.

67. The change in date of the course in Hungary necessitated the postponement of the training course on marketing of forest products to 1976.

68. The Committee agreed that the next study of timber trends and prospects, scheduled for 1974/75, which would have to study in depth the fundamental changes taking place particularly in the prospects for wood supply up to the year 2000, should not include the word "interim" in its title as shown in the draft programme of work.

69. The Swedish delegation put forward the following matters relating to the Committee's activities for consideration:

(a) less emphasis should be given at its sessions to the short-term review of the market, and more to the surveys of medium-term trends in specific sectors. The International Sawn Softwood Conference was a more suitable body to discuss the former. It was also questionable whether the special statement on the market drawn up by the Committee served a useful purpose;

(b) ad hoc symposia and seminars, if they were to bring good results, had to be carefully planned in advance and had to deal with precisely defined topics. For example, the proposed symposium on the economic aspects of modernization in the forest industries and the seminar on marketing of forest products were, judged by their present titles, too broad in scope;

(c) as already suggested by the Office-holders, study tours might be held biannually, instead of annually;

(d) it seemed necessary to reconsider the status of the Committee's permanent subsidiary bodies. The work of the Joint FAO/ECE Working Party on Forest and Forest Products Statistics, for example, might be more effectively carried out by means of ad hoc meetings or studies.

70. In the course of discussion on these questions, the following points were made:

(a) in the past few years the Committee had streamlined its market discussions very appreciably. Government agencies and the forest products industry and trade in many countries attached considerable value to the Committee's short-term market reviews, which were widely recognized as giving an objective assessment of the market situation. The International Sawn Softwood Conference dealt only with sawn softwood, whereas the Committee covered a much wider range of forest products.

(b) The Provisional Group of Experts on the Wood-working Industries had been established by the Committee very largely for the purpose of carrying out the necessary preparatory work for all the Committee's symposia and seminars on economic and technical aspects of industry and trade. The titles of the meetings shown in the Committee's long-term programme of work were intended to indicate only the broad scope of each project concerned and it was the task of the preparatory meeting to decide on its precise topic and the way it should be organized in order to obtain the best results.

(c) The programmes and working methods of the permanent subsidiary bodies had been considerably streamlined in recent years, with the result that their operating flexibility had markedly improved.

71. The Committee agreed that the questions raised by the Swedish delegation were of great importance and merited further scrutiny. It therefore decided on the following procedure:

(i) To request the Secretariat to draw countries' attention to the already existing conclusions and recommendations by the ECE and by recent symposia or other meetings sponsored by the Committee which had a bearing on the orientation of the Committee's future programme of work ; also to relevant work being carried out by other international organizations which collaborate in the Committee's activities.

(ii) In accordance with the Office-holders' proposal, to invite countries to submit to the Secretariat by 31 March 1973 their suggestions and priorities for possible other projects to be included in its long-term programme of work and the appropriate way of carrying them out bearing in mind that the resources available are limited and cannot be expected to expand in the foreseeable future.

(iii) To request the Secretariat to circulate the text of the letter received from the Swedish authorities which raised the matters referred to above and to invite countries to comment on it.

(iv) To request its Office-holders to review countries' replies to (ii) and (iii) above and to prepare a report for consideration by its 31st session.

Programme of work and priorities for 1973 (Item 14 of the Agenda)

72. The Committee adopted its programme of work and priorities for 1973 as set out in Annex III. The Committee repeated its thanks to Canada for its offer to present the special lecture on stress-grading of sawn softwood at its 31st session. It noted with satisfaction that Mr. P. Vassiliev (USSR) would give the lecture on the forest economy of the USSR which he had been prevented from delivering at the present session. There would thus be special lectures on two separate topics at its next session.

Other business (Item 15 of the Agenda)

73. The United Kingdom presented delegates with copies of a report on the recovery of timber damaged by gales in Scotland in 1968. State and private forest managements and the timber trade had been forced to co-operate very closely and the co-ordination of their activities, which had arisen out of necessity, had continued after the disaster and was having lasting beneficial effects. The organization of the clearance work had been hampered by the absence of guidelines from previous disasters, and with this in mind a booklet had been prepared for use in any similar occurrence in the future. The Committee thanked the United Kingdom for its contribution.

Date of the next session (Item 16 of the Agenda)

74. The Committee agreed that its 31st session should, if possible, take place in October 1973 at an earlier date than the present session.

PROGRAMME OF WORK AND PRIORITIES FOR 1974-1978

Note: The work programme of the ECE in the field of forest products is developed and carried out jointly with the FAO, the latter organization providing most of the professional staff engaged in the work. Below are listed the projects, primarily the responsibility of the ECE Timber Committee, to be undertaken during the period 1974 to 1978, as included in its long-term programme of work and priorities adopted at its 30th session. In addition to the annual sessions of the Timber Committee, Joint FAO/ECE/ILO and FAO/ECE bodies will deal with the projects where appropriate. (The joint projects for which FAO and ILO are primarily responsible do not figure in this list.)

12.1.1 Forest products market reviews and allied questions

Description: The Timber Committee will review annually the markets in the ECE region for sawn softwood, hardwoods (including tropical), pulpwood, coniferous logs and wood-based panels (plywood, fibreboard and particle board). In addition the Secretariat will produce a biannual review of the forest products market in the ECE region as well as the biannual Timber Bulletin for Europe containing quarterly statistics relating to production, trade and prices of the main forest products in Europe and North America. Market reports will be compiled and published periodically on particular countries, commodities and market sectors. The series of studies on the utilization of forest products in different end-uses will be continued. A special lecture will be presented to each annual session of the Timber Committee. Developments in the transport and handling of forest products will be kept under review.

12.1.2 Technical and economic aspects of the wood-working industries

Description: The activities of the Committee in this field will be covered by the activities of the Provisional Group of Experts on the Wood-working Industries, which include advising the Committee on the implementation and co-ordination of its activities in the field of the wood-working industries, product development and utilization, and assisting in the organization of symposia and seminars in the above fields. The Group of Experts will examine, in depth, technical and economic aspects of the wood-working industries which are referred to it by the Committee. The activities in this field are mainly carried out by means of ad hoc meetings, study tours, symposia, seminars and training courses.

12.1.3 Increased efficiency in forest operations

Description: The activities of the Committee in this field are covered by the work of the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers, which aims at increasing efficiency in forest operations by improving the methods of work through the exchange of information on the development of forest machinery, by studying the techno-economic aspects of the application of

machinery and manual work, taking into account the multiple use of the forest, and by promoting vocational training of forest workers and the prevention of accidents. These activities will be carried out through study groups, symposia and training courses and with the collaboration of experts. Sessions of the Joint Committee will be held once every two years.

12.1.4 Forest and forest products statistics

Description: The activities of the Committee in this field are covered by the activities of the Joint FAO/ECE Working Party on Forest and Forest Products Statistics which deals with various statistical problems at the European level which are referred to it by the Timber Committee and the European Forestry Commission of FAO, as well as by the ECE Conference of European Statisticians. These problems include statistical methodology and co-ordination, the comparability and uniformity of forestry and forest products statistics, their collection and publication, and computerization in forestry and forest industries. Sessions of the Working Party will usually be held once every two years.

TABLE A - TIMBER COMMITTEE

Project item	Project	1973	1974	1975	1976	1977	1978
12.1.1. 12.1.1(a)	<u>Forest products market reviews and allied questions</u> General activities	Annual review by the Timber Committee of the markets in the ECE region for sawn softwood, hardwoods, (including tropical); pulpwood and coniferous logs; plywood, fibreboard and particle board. Half-yearly reviews of the forest products market by the Secretariat, together with quarterly statistics relating to production, trade and prices of forest products in the region. Annual review by the Committee of developments in transport and handling of forest products. Periodic compilation and publication by the Secretariat of market reports on particular countries, commodities and market sectors.					
12.1.1(b)	Special reviews	Wood-based panels (including 5th survey of the structure and raw material consumption of these industries - carried out jointly with FAO)	Sawnwood and sawlogs	Pulpwood (including residues and chips), pitprops and miscellaneous roundwood	Wood-based panels (including 6th survey of the structure and raw material consumption of these industries - carried out jointly with FAO)	Sawnwood and sawlogs	Pulpwood (including residues and chips), pitprops and miscellaneous roundwood
12.1.1(c)	Special studies	Utilization of Forest products in: (a) furniture (b) doors, windows and related joinery Forecasting methodology, supply aspects and resource appraisal 1/	Review of European Timber Trends and Prospects (jointly with FAO)		Forest products in packaging (including containers, pallets, etc.) Utilization of forest and industrial residues and chips, small-sized wood and bark	Production and utilization of improved wood-based panels, with particular reference to the surface covering of panels	
12.1.1(d)	Special lectures	(a) Stress grading of sawn softwood (b) The forest economy of the USSR	Subjects if possible related to the Committee's special review or study for the year in question and to be selected each year from among the following or other topics that may be of current importance at the time: raw materials for plywood, rationalization of stockyards, combination with other materials, implication of tariff changes on European forest products sector, publicity, public relations and dissemination of information, structure of forest products trade and marketing, location of forest industries, accident prevention in forest industries, investment and production costs and returns, use of forest products in mass-production processes and wood preservation.				
12.1.2 12.1.2(a)	<u>Technical and economic aspects of the wood-working industries</u> Meetings	Covered by the activities of the Provisional Group of Experts on the Wood-working Industries					
12.1.2(b)	Study tours in the following countries:	Czechoslovakia	Canada	Austria	..... 3/	..... 3/	..... 3/
12.1.2(c)	Symposia in the following countries: Subject: (Note: These symposia are organized jointly with FAO)		..... 3/			..... 3/	Utilization of forest and industrial residues and chips, small-sized wood and bark
12.1.2(d)	<u>Training courses or seminars in the following countries:</u> Subject:		Hungary Training course: uses of particle board and fibreboard	Norway Seminar: manufacture and utilization in construction of mass-produced forest products (jointly with ECE Committee on Housing, Building and Planning)	..... 3/		Training course: marketing of forest products

1/ It is proposed to convene an ad hoc meeting to advise on suitable forecasting methodologies and ways to deal with supply aspects and resource appraisal in the Review of European Timber Trends and Prospects.

2/ The 1st session of the Provisional Group of Experts on the Wood-working Industries will meet in Geneva in January 1973 to consider the problems in the wood-based panels sector referred to it by the 28th session of the Committee (E/ECE/TIM/96, para.101). It is proposed that the 2nd session be convened in Geneva, possibly in April 1973 to coincide with the Timber Committee office-holders' 11th meeting, to establish the scope and objectives of the Symposium on economic aspects of the modernization of forest industries and to draw up a provisional outline as well as establishing a list of experts who would be invited to present papers. The 3rd session will consider the problem of the international comparability of grading rules for sawn softwood and possible future action by the Committee in this field. The 4th session will meet in 1974 and will consider possible activities relating to the use of forest products in construction in the light of the results of the study on the utilization of forest products in construction.

3/ Host country to be decided.

TABLE B - SUBSIDIARY BODIES

Project item	Project	1973	1974	1975	1976	1977	1978
12.1.3 12.1.3 (a)	<u>Increased efficiency in forest operations</u> General activities	Covered by the activities of the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers Aims at increasing efficiency in forestry operations by: devising means for improving the organization and productivity of forest labour; exchanging information on the development of forest machinery; studying techno-economic aspects of the application of machinery and manual work, taking into account the multiple use of the forest; promoting vocational training and prevention of accidents. These activities are carried out through study groups, training courses and symposia and with the collaboration of experts. (For particulars of the Joint Committee's programme of work see FAO/ECE/LOG/249)					
12.1.3 (b)	Main meetings	Symposium on multipurpose logging machines	France 10th session of Joint Committee, including a Symposium on a subject of interest to the host country	2nd symposium on ergonomics applied to forestry	..... 1/ 11th session of the Joint Committee		..... 1/ 12th session of the Joint Committee
12.1.3 (c)	Meetings of study groups	Methods and organization of forest work (7th session) Vocational training and prevention of accidents in forest work (10th session)	Mechanization of forest work (6th session)	Methods and organization of forest work (8th session) Vocational training and prevention of accidents in forest work (11th session)	Mechanization of forest work (7th session)	Methods and organization of forest work (9th session) Vocational training and prevention of accidents in forest work (12th session)	Mechanization of forest work (8th session)
12.1.3 (d)	International training courses and/or seminars	Federal Republic of Germany Seminar on ergonomics applied to forestry	Pedagogic and organizational problems of forest worker training				
12.1.4 12.1.4 (a)	<u>Forest and forest products statistics</u> General activities	Covered by the activities of the Joint FAO/ECE Working Party on Forest and Forest Products Statistics, which deals with problems referred to it by the Timber Committee and the FAO European Forestry Commission, as well as by the ECE Conference of European Statisticians. Problems under consideration: statistical methodology and co-ordination, matters concerning the comparability and uniformity of forest products statistics, their collection and publication; also removals statistics, labour statistics, economic indicators, price statistics, evaluation of indirect benefits of forest, conversion factors, forest fire statistics, computerization in forestry and forest industry.					
12.1.4 (b)	Meetings	9th session of Working Party		10th session of Working Party		11th session of Working Party	
12.1.4 (c)	Special studies and projects	Indirect benefits of forestry. Projects to evaluate the indirect benefits and the Social role of forests (in co-operation with IUFRO) Conversion factors in forestry and forest industries Labour productivity: project to evaluate trends in labour distribution and labour productivity in the forestry and forest industry sector (in co-operation with ILO) World Forest Inventory - review of European recommendation for possible improvements to the layout and contents Removal statistics and roundwood classification Product classification: Project to review and update forest product classification and definitions for production and trade statistics (in co-operation with ISO) Economic indicators: project to develop standards for internationally comparable indicators covering production trade and prices of forest products Comparability of forestry statistics covering removal, production and trade statistics.					
12.1.4 (d)	Ad hoc meetings	Product classification and definitions	Further action to be proposed by the Working Party				

1/ Host country to be decided.

PROGRAMME OF WORK AND PRIORITIES FOR 1973

Note: The work programme of the ECE in the field of forest products is developed and carried out jointly with the FAO, the latter organization providing most of the professional staff engaged in the work. Below are listed the projects, primarily the responsibility of the ECE Timber Committee, to be undertaken during the period between its 30th and 31st sessions (1973) in implementation of its long-term programme of work and priorities, adopted at its 30th session. In addition to the annual session of the Timber Committee, Joint FAO/ECE/ILO and FAO/ECE bodies will deal with the projects where appropriate. (The joint projects for which FAO and ILO are primarily responsible do not figure in this list.)

12.1.1 Forest products market reviews and allied questions (Priority A)

Description: The Committee at its 31st session in 1973 will review the market in the ECE region for sawn softwood, hardwoods (including tropical), pulpwood and coniferous logs and wood-based panels (plywood, fibreboard and particle board).

The Secretariat will prepare a review of the forest products market in the ECE region covering the period 1972 to March 1973.

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

A special review will be undertaken on the wood-based panels sector, including the triennial survey, jointly with FAO, of the structure of these industries and their raw material consumption.

The special studies on the use of forest products in furniture, as well as in doors and windows and related joinery will be continued. The study on wooden railway sleepers will be completed and published.

An ad hoc meeting will be convened to advise on suitable forecasting methodologies and ways to deal with supply aspects and resource appraisal in the Review of European Timber Trends and Prospects.

Special lectures will be delivered at the Committee's 31st session on the stress grading of sawn softwood, and on the forest economy of the USSR.

The Committee will review at its 31st session developments in the transport and handling of forest products.

12.1.2 Technical and economic aspects of the wood-working industries (Priority A)

Description: The activities of the Committee in this field will be covered by the Provisional Group of Experts on the Wood-working Industries. The Provisional Group of Experts will hold its 1st, 2nd and 3rd sessions during 1973. The 1st session will deal with industrial statistics and related matters in the wood-based panels sector. The 2nd session will establish the scope and objectives of the symposium on economic

aspects of the modernization of forest industries and draw up a provisional outline of the symposium and a list of experts who would be invited to present papers. The 3rd session will consider the problem of the international comparability of grading rules for sawn softwood and possible future action by the Committee in this field.

A study tour will be held in Czechoslovakia.

12.1.3 Increased efficiency in forest operations (Priority A)

Description: The activities of the Committee in this field are covered by the work of the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers, which aims at increasing efficiency in forest operations by improving the methods of work, by the mechanization of forest work and by better training of forest workers and the prevention of accidents.

The Study Group on vocational training and prevention of accidents in forest work will hold its 10th session.

The Study Group on methods and organization of forest work will hold its 7th session.

A Symposium will be held on multipurpose logging machines.

12.1.4 Forest and forest products statistics (Priority A)

Description: The activities of the Committee in this field are covered by the work of the Joint FAO/ECE Working Party on Forest and Forest Products Statistics which deals with various statistical problems at the European level which are referred to it by the Timber Committee and the European Forestry Commission of FAO, as well as the ECE Conference of European Statisticians. The Working Party will hold its 9th session and deal with those problems which have been referred to it by its parent bodies. An ad hoc meeting on the classification and definitions of forest products will be held.

Work on the up-dating of the earlier survey on conversion factors used in forestry and the forest industries, on the international comparability of removal statistics, on the quantification and evaluation of the indirect benefits and the social role of forests and on labour statistics will continue.