REPORT OF THE THIRTY-THIRD SESSION
held at Geneva from 20 to 24 October 1975

As approved by the Committee

Table of contents

<p>| Introduction                             | 1 |
| Adoption of the Agenda                   | 4 |
| Election of officers                     | 3 |
| Matters arising out of the thirtieth session of the Commission | 6 |
| Activities of other international bodies relevant to the work of the Committee | 8 |
| Review of activities since the thirty-second session of the Committee, (other than joint subsidiary bodies) | |
| (a) Symposium on the modernization of the sawmilling industry | 11 |
| (b) Seminar on industrial production and use of wood-based products in the building industry, Sandefjord (Norway) | 13 |
| (c) Study tour in Austria                | 15 |
| (d) Standardization                      |  |
|   (i) ECE standard for stress grading of coniferous sawn timber | 17 |
|   (ii) Standardization of finger-jointing in structural coniferous sawn timber | 19 |
| (e) Transport and handling of forest products | 20 |
| Joint subsidiary bodies                  |  |
|   (a) Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers | 21 |
|   (b) Joint FAO/ECE Working Party on Forest Economics and Statistics | 29 |</p>
<table>
<thead>
<tr>
<th>Table of contents (continued)</th>
<th>Paragraph</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market review and prospects</td>
<td>33</td>
</tr>
<tr>
<td>Study of timber trends and prospects in the ECE region, 1950-2000</td>
<td>42</td>
</tr>
<tr>
<td>Symposium on &quot;Forests and wood: their role in the environment&quot;, Interlaken (Switzerland)</td>
<td>51</td>
</tr>
<tr>
<td>Activities of other principal Subsidiary Bodies of ECE dealing with problems of concern to the Timber Committee</td>
<td>55</td>
</tr>
<tr>
<td>Programme of work and priorities</td>
<td></td>
</tr>
<tr>
<td>(a) For 1975/76</td>
<td>58</td>
</tr>
<tr>
<td>(b) Long-term programme of work and priorities for 1977-1981</td>
<td>61</td>
</tr>
<tr>
<td>Any other business</td>
<td>80</td>
</tr>
<tr>
<td>Adoption of the report of the Committee's session</td>
<td>81</td>
</tr>
<tr>
<td>Date of the next session</td>
<td>82</td>
</tr>
<tr>
<td>Annex I — Europe (excluding USSR): Summary table of market forecasts for 1975 and 1976</td>
<td></td>
</tr>
<tr>
<td>Annex II — Programme of work and priorities for 1975/76</td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTION

1. The Timber Committee held its thirty-third session at Geneva from 20 to 24 October 1973. The session was attended by representatives from the following ECE member countries: Austria; Belgium; Bulgaria; Byelorussian SSR; Canada; Cyprus; Czechoslovakia; Denmark; Finland; France; German Democratic Republic; Germany, Federal Republic of; Greece; Hungary; Iceland; Ireland; Italy; Netherlands; Norway; Poland; Portugal; Romania; Spain; Sweden; Switzerland; Turkey; Ukrainian SSR; Union Soviet Socialist Republics; United Kingdom; United States of America; Yugoslavia. Australia, Brazil and Israel participated under article 11 of the Commission’s terms of reference. The United Nations Development Programme (UNDP), the United Nations Industry Co-operative Programme (UNICP) and the United Nations Institute for Training and Research (UNITAR) sent representatives. The International Labour Organization (ILO) and the Food and Agriculture Organization of the United Nations (FAO) also participated. The European Economic Community sent representatives. The Organization of European Saw-milling Industries (OES) attended the session. A staff official of the Organisation for Economic Co-operation and Development (OECD) participated at the invitation of the Secretariat.

2. The Chairman of the Timber Committee, Mr. A. Madas (Hungary) opened the session and welcomed delegates.

3. The Committee discussed items 6, 7, 8 and 9 of the Agenda in joint session with the FAO European Forestry Commission, which held its seventeenth session concurrently.

Adoption of the Agenda (Item 1 of the agenda)

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

Election of officers (Item 2 of the Agenda)

5. The Committee re-elected Mr. A. Madas (Hungary) Chairman, and Mr. J. Bakker (Netherlands) and Mr. F. Palmer (United Kingdom), Vice-Chairmen.

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

6. The Committee was informed of the Commission’s discussion of its work and took note of the resolutions and decisions of the Commission, on the basis of document TIM/R.20.

7. The Committee noted that it should bear in mind during its session Commission resolution 1 (XXX) - The work of the Commission as a whole, resolution 2 (XXX) - The future activities of the Commission, resolution 3 (XXX) - Programme of work of the Commission for 1975/76 and its long-term programme of work for 1976-1980, decision E (XXX) - Industrial co-operation, decision F (XXX) - Energy problems in the ECE region, decision G (XXX) - Standardization, decision K (XXX) - Participation of the Republic of San Marino in the work of the Commission, and decision L (XXX) - Participation of the European Economic Community and the Council for Mutual Economic Assistance in the work of the Commission.

1/ Further details about participation are available from the Secretariat - ECE/FAO Timber Division, Palais des Nations, CH-1211 Geneva 10.
Activities of other international bodies relevant to the work of the Committee
(item 4 of the Agenda)

8. The representative of FAO explained that the Technical Conference on Tropical Moist Forests, originally scheduled to have been held in Brazil in September-October 1975, would, because that country had found it impossible to host the meeting, now be held in condensed form as a meeting of the Committee for Forest Development in the Tropics, probably in November 1976. The rich documentation provided for the meeting would be summarized and made available at the time of the next meeting of the Committee on Forestry, scheduled for 24 to 28 May 1976. A major work item of FAO during the coming year would be the Pulp and Paper Development Programme designed to determine the priority position of a number of pulp and paper mill projects in developing countries against the background of the world and regional demand/supply situation in these commodities.

9. The representative of the United Nations Industry Co-operative Programme (ICP) informed the Committee of that organization's work for industrial development and outlined areas where the two bodies could co-operate, notably as concerns tropical hardwoods and their utilization in industrialized countries.

10. The representative of OECD informed the Committee of the progress of a study on the collection and consumption of waste paper which will be published in April or May 1976, and a study on energy economies in the pulp and paper industry. She also informed the Committee of a proposed study on materials resources and natural resources, including wood. The Committee noted that the subject matter of the latter study appeared to cover much of the ground in its own study on timber trends and prospects in the ECE region, 1950-2000, and considered close inter-secretariat collaboration essential to avoid any duplication of effort.

Review of activities since the thirty-second session of the Committee (other than joint subsidiary bodies) (item 5 of the Agenda)

(a) Symposium on the modernization of the sawmilling industry

11. The Committee endorsed the conclusions and recommendations of the symposium, held in January 1975 under the chairmanship of Mr. J. F. S. Carruthers (United Kingdom), on the basis of its report (TIM/SEM.3/2) and expressed its satisfaction with the results obtained. In view of the interest of delegations in the many valuable contributions to the symposium, the Committee recommended that the papers presented be published as a supplement to the Timber Bulletin for Europe. The Committee also expressed its gratitude to the Government of Switzerland for organizing a study visit during the symposium.

12. Delegations suggested that the symposium should be followed by similar symposia on the wood-based panels and furniture industries. It was agreed to discuss these proposals further under item 11 of the agenda.

(b) Seminar on industrial production and use of wood-based products in the building industry, Sandefjord (Norway)

13. The Committee was informed, on the basis of its report (TIM/SEM.1/1), of the outcome of the seminar which had been held at Sandefjord (Norway), under the chairmanship of Mr. H. Skjelmerud (Norway), in June 1975, and of the study tour organized in connexion with it. The seminar and study tour had been held under the joint auspices of the Timber Committee and the Committee on Housing, Building and Planning.
14. The Committee endorsed the report of the seminar, noted with satisfaction the fruitful and constructive inter-Committee collaboration that had been achieved, and expressed its gratitude to the Government of Norway for the excellent facilities provided for the seminar and the related study tour. Appreciation was also expressed to the Norwegian authorities for their offer to assist in the implementation of possible follow-up work. It was agreed that this work should be discussed under item 11 of the Agenda. Attention was drawn to the proposals made for further and intensified cooperation between the two sponsoring Committees, especially in the field of building regulations.

(c) Study tour in Austria

15. The study tour in Austria took place from 7 to 13 September 1975. Eighty participants visited forest operations in mountainous conditions, as well as in the plain, avalanche protection operations, sawmills and other wood-processing industries, mainly in Upper Austria.

16. The Committee expressed its gratitude to the Government of Austria for the valuable visits arranged and excellent organization of the study tour and for the generous hospitality extended to participants.

(d) Standardization

(i) ECE standard for stress grading of coniferous sawn timber

17. The Committee was briefly informed of research carried out on the ECE standard approved by the Committee at its thirty-second session. It agreed that the ad hoc meeting which had drawn up the standard should be reconvened in July 1976, to review developments and suggest changes where appropriate, as proposed by the Committee at its thirty-second session. The Committee requested all countries with experience of the standard in practice or relevant research results to communicate them to the Secretariat before 29 February 1976 so that they could be circulated well before the meeting. The ad hoc meeting was requested to review the suitability of the term "ECE standard".

18. The Committee heard that ISO Technical Committee 55 - Sawn timber and sawlogs - which had met in Tbilissi (USSR) in June 1975, was informed of its work. After final approval of the revised ECE standard by the Committee, it should be submitted to ISO TC55 with the recommendation that it be adopted as an ISO International Standard. Appreciation was expressed for the fruitful collaboration being enjoyed between the Timber Committee and the relevant Technical Committees of ISO.

(ii) Standardization of finger-jointing in structural coniferous sawn timber

19. The Committee was informed, on the basis of documents TIM/R.21 and TIM/R.21/Add.1, of preparatory work carried out since its thirty-second session. It approved the proposals made by a drafting group, notably that the group should meet again in early spring 1976 to prepare a proposal for a draft standard, which should be studied by the ad hoc meeting being convened in July 1976 to review the ECE standard on stress grading of coniferous sawn timber. The Committee expressed its gratitude to Träinformation (Sweden) and the Princes Risborough Laboratory of the Building Research Establishment (United Kingdom) for the work they had done on the project.

(e) Transport and handling of forest products

20. The Committee's co-ordinator, Mr. F. Palmer (United Kingdom), reported that progress was continuing in the rationalization of the transport and handling of forest products. Although developments should be kept under review, he considered that in...
view of the progress achieved in timber transport and handling, this item could for the time being be allotted priority B in the work programme.

Joint subsidiary bodies (Item 6 of the Agenda)

(a) Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers

21. Mr. R. Brunet (France), Chairman of the Joint Committee, introduced the report (TIM/EFC/1/1/3) of its tenth session, held at Paris from 28 to 31 October 1974 and preceded by a study tour in France. He also informed the joint session about the symposium on stand establishment, organized jointly with the International Union of Forestry Research Organizations (IUFRO) on this occasion. The joint session approved the report of the Joint Committee and warmly thanked the Government of France for the excellent organization of the session, symposium and study tour.

22. The joint session thanked the outgoing Chairman of the Joint Committee, Mr. K. Zaremba-Czereyiski (Poland), for the valuable work carried out during his term of office.

23. The excellent collaboration between the Joint Committee and IUFRO was appreciated and the importance of close co-operation with other international bodies stressed. The joint session suggested that more specific reference might be made in future reports by all subsidiary bodies to the decisions taken on how work should be shared between the international bodies working in this field.

24. The joint session noted further that the question of a possible amalgamation of the Study Groups on Methods and Organization and on Mechanization of Forest Work had been raised, and that these two Study Groups will meet together in February 1976, when they will try to determine subjects of common interest and ways of future co-operation. The joint session felt, however, that it was not advisable at present that the Study Groups should merge.

25. The joint session was reminded of the invitation extended to the Joint Committee by the Government of Finland to hold its eleventh session at Hyvinkää, from 14 to 19 June 1976, together with a study tour and symposium on the harvesting of a larger part of the forest biomass. It noted with satisfaction that great care was being taken in co-ordinating the programme of this symposium with that of the symposium on extending the use of wood residues, to be organized by the Timber Committee in September 1976 in Romania.

26. The joint session was informed of the eighth session of the Study Group on Methods and Organization of Forest Work, held in March 1975, and of the establishment of an ad hoc group on methods and levels of payment.

27. The joint session was also informed of the symposium on multi-purpose logging machines, held in June 1975 in Sweden. Warm thanks were expressed to the Government of Sweden for the excellent organization of the symposium.

28. The delegation of the USSR informed the joint session of international logging competitions that are organized at regular intervals in different countries, and drew its attention to the next one, to take place in Bulgaria in 1976.

1/ Items 6 to 9 of the Agenda were discussed in joint session with the FAO European Forestry Commission
(b) Joint FAO/ECE Working Party on Forest Economics and Statistics

29. The session reviewed and endorsed the report of the tenth session of the Joint FAO/ECE Working Party on Forest and Forest Products Statistics (ECE/FAO/MP.2/4). In particular, it confirmed that the new title of the Working Party should be "Joint FAO/ECE Working Party on Forest Economics and Statistics" and approved the new terms of reference recommended by the Working Party which are as follows:

"The Joint FAO/ECE Working Party on Forest Economics and Statistics shall:

(a) keep under review the needs at the international level for statistics and other information relating to the forestry, wood-processing and forest products sector; and develop programmes to meet these needs. Particular attention shall be paid to improving concepts, definitions and methodologies in order to increase the international comparability of statistics;

(b) develop, upon request from the parent bodies, methodologies for use in economic analysis as well as techniques for the collection, processing and presentation of information and statistics;

(c) undertake, upon request from the parent bodies, ad hoc projects in the field of economics and statistics relating to forestry and forest products;

(d) work together with the Conference of European Statisticians and other international bodies in related fields of statistics with a view to achieving co-ordination of activities and avoiding any unnecessary duplication of effort."

30. The joint session noted that, in the interests of brevity, the title of the Working Party only contained the word "forest" but emphasized that the terms of reference made clear that the sectors covered by the Working Party coincided with those of its parent bodies and thus covered statistical and economic questions relating to the forest and wood-processing industries and their products.

31. The joint session stressed that enquiries on labour statistics undertaken by the Working Party should be closely co-ordinated with work undertaken on methods of payment by the Study Group on Methods and Organization of Forest Work, a subsidiary body of the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers.

32. The need for the publication of the World Forest Inventory was again stressed. The Secretariat reported that, in accordance with FAO's region-by-region approach:

- data on the ECE region were available in the study of timber trends and prospects, 1980-2000 and would soon be issued in tabular form;

- data on the Asia-Pacific region had been circulated to countries for review and would soon be available;

- the Latin American forest inventory was making satisfactory progress.

Market review and prospects (Item 7 of the Agenda)

33. The joint session heard a brief statement from each delegation on recent developments in the market for sawn softwood, hardwoods, wood-based panels, pulpwood and coniferous logs, which supplemented countries' written market statements. It took note during its discussions of the Annual Forest Products Market Review published by
the Secretariat, and of the brief comments on recent developments in the market submitted by the Secretariat in TIM/CRP.15. It drew up tables of countries' estimates for 1975 and 1976 of domestic requirements, production, imports and exports of the products under consideration. A summary table is presented in annex I.

34. The setback in 1975 in the markets for forest products in Europe and worldwide has been far more severe than was foreseen at the Timber Committee's previous session. This is related to the economic recession in the market economy countries which has proved to be deeper and longer-lasting than had been generally anticipated. Furthermore, the whole of the forest products sector has been involved in the downturn, contrary to expectations last year, when the Committee felt that activity would be maintained at least in the pulp and paper sector, with a corresponding modest growth in requirements of pulpwood in 1975. Clearly these requirements will be less than was foreseen last year.

35. The joint session considered that the economic outlook for the year ahead is little clearer now than it was in October 1974 for 1975. The present uncertainties, however, stem from altered conditions. While the possibility of a major depression now appears remote, and the probability of an eventual recovery of the western European economies is generally accepted, the timing of the upturn, and its likely form and strength, is still difficult to predict. Many countries' policies have shifted since the beginning of 1975 towards a more reflationary stance, and measures have been introduced to stimulate economic activity, notably in the construction sector, and to alleviate the unemployment problem. Governments are having to be cautious, however, in adopting these measures because of the risk of inducing a renewed cost/price spiral, given that inflation rates are still high by historical standards.

36. In the United States, leading indicators show that the economy is recovering in the autumn of 1975. Given its importance to world trade, the further improvement in the United States economy foreseen for 1976 can lead the way towards a more general recovery. In view of this and the reflationary steps taken in many other market economy countries, the joint session is guardedly optimistic about an eventual recovery in western Europe's economy, though unwilling to pronounce on its course or strength.

37. It appears that the trough of the economic recession has now been passed in the majority of western European countries. Similarly, the steep declines in demand for forest products over the past year seem to be levelling off. While for several of these products the levels of consumption and trade in 1975 will be the lowest since the late 1950s or early 1960s, a floor is being established from which the next movement, when it comes, can only be upwards.

38. Given the above, there is now an urgent need for the forest products sector to lay the basis on which stable market conditions can be re-established and preparations made for an upturn in demand. The joint session recognized the damage inflicted, in terms of reduced confidence and economic viability, on all segments of the forest products market by the speculative boom of 1972/1973 and by the severity of the drop in demand in 1974/1975. Because of this, the consolidation of healthier market conditions will require understanding from and co-operation by all sectors of the industry and trade, as well as the forest owners, in tackling the problems to be overcome.

39. One of the most serious of these problems is, in the joint session's view, how to ensure that output of processed wood products will be built up again, when required, with sufficient flexibility and in step with demand to avoid repetitions of the market distortions of the recent past. Producers, notably in Canada, Sweden and Finland, who have suffered the largest declines in output, face the prospect of shortages of labour
in harvesting and wood industries, especially skilled labour, resulting from cut-backs in employment. In addition, the development of the cost/price relationship and forest employment problems are limiting fresh log supplies to the industry.

40. The joint session stressed that the physical availability of wood raw material is not the problem. The preliminary findings of the new study on long-term timber trends and prospects in the ECE region indicate that wood should be in adequate supply. To realize the wood supply potential, however, it is necessary to invest in the long-term future of forestry and the industry, and this will be made possible only by a return to better levels of profitability.

41. The Committee and the Commission concluded that the pace and timing of the recovery in the markets for forest products depended largely on overall economic developments and on the reflationary measures taken by most governments. The forecasts of domestic requirements and of imports of forest products in 1976 which have been established by the joint session reflect the still cautious and uncertain approach being taken to the prospects for an upturn; no sharp rise in demand is foreseen for next year. A steady-paced recovery would, in fact, be in the interests of all segments of the trade, since it would allow the difficulties inherent in the return to a better supply/demand equilibrium to be resolved and give time for a firmer foundation to be established from which to plan longer-term recovery and expansion.

Study of timber trends and prospects in the ECE region, 1950-2000 (Item 8 of the Agenda)

42. The item was introduced by Mr. E. Glesinger, one of the architects of the original European timber trends study. He reviewed the history of the earlier studies and their use as policy formulating tools, and commented on the basis of document TIM/CRP.13 on the preliminary findings of the new study.

43. The Secretariat presented the results of the study in draft form (TIM/R.22 and TIM/CRP.14) which

(1) reviewed for the different product groups and wood assortments trends in consumption and supply patterns

(2) deployed, according to a variety of assumptions, the preliminary projections of future consumption and estimates of prospective supplies from Europe's forests as well as from imports from other regions, and

(3) considered the imbalances implied by this tentative outlook.

44. The joint session recognized that the projections of consumption were based not only on various different assumptions of income and population growth but that they carried with them the implied assumptions of a continuation of the major trends of the 1960 - 1972 period in supply, relative prices and in product substitution. In the likely event of there being substantial structural shifts in the future supply patterns and in the development of product markets, actual consumption would deviate from the projected trends. However, in the final stage of the study, after the consideration of all comments, the Secretariat would attempt to find ways to adjust and correct the supply/demand imbalances. This "matching exercise" would provide strong indications of the ways in which the trends in supply and demand might be expected to alter to take account of the changing situation.
45. While recognizing the incomplete and imperfect status of the study, which could partly be attributed to the much lower availability of resources than foreseen, the joint session expressed great satisfaction with the draft version presented to it. A large number of both general and detailed comments of a constructive nature were provided by delegates.

46. The joint session considered that the future development of costs, prices and returns would be critical. It expressed its gratitude to Mr. A. Skeppstedt (Norway) for his interesting presentation of price trends in the Nordic countries and hoped that this information could be incorporated into the final version of the study, together with other price data, such as those prepared by Mr. O. Eckenmüller (Austria) and Mr. J. Fuchs (France) for the Joint FAO/ECE Working Party on Forest Economics and Statistics. The joint session expressed its hope that the basis for such studies would be laid in all member countries, so that it would be possible to keep changes in price relationships under review.

47. Above all, the importance of the study as a basic tool in long-term planning and establishment of forest policy was stressed. It was clear that the wood supply from the region's forests could be considerably increased on the basis of intensified silviculture and management. This would require improved knowledge of the forest and its structure. Many approaches for improving productivity as well as constraints on supply were noted.

48. The political aspects of the study were also referred to, as well as the need to stress the growing significance of forestry and the forest products industries in a changing situation, where increasing importance was attached to questions concerning raw materials, energy and the environment.

49. It was agreed that a finalized study was needed urgently and that this need outweighed that for perfection. Countries agreed to supply comments in writing to the ECE/FAO Secretariat by 31 December 1975. The joint session requested the Secretariat to revise the study in the light of comments and corrections received, supported the suggestion that it should obtain advice from a number of experts on the final presentation of the study, and that this might conveniently be done at an informal meeting held on the occasion of the next Timber Committee office-holders meeting in March 1976. The published version of the study should be available by the time of the thirty-fourth session of the Timber Committee in October 1976.

50. Subsequent sessions of both the Timber Committee and the European Forestry Commission would need to consider ways in which the study's findings, as well as the implications of these findings on their programmes of work, should be kept under regular review. Technological developments which could shape future trends could, for example, be identified at expert meetings scheduled in the respective programmes of work.

Symposium on "Forests and wood: their role in the environment", Interlaken (Switzerland) (Item 9 of the Agenda)

51. The report of the symposium (TIM/SEM.4/2) was presented to the joint session by its chairman, Mr. M. de Coulon (Switzerland).

52. The joint session endorsed the report and agreed that the symposium had been valuable in bringing forward important contributions on the complex questions relating to the optimum management of the forest resource to meet the public's diverse and changing demands. In relating the conclusions of the symposium to the preliminary findings of the timber trends study, several delegates stressed the impact of the growing protective and recreational role of the forest on potential wood supply.
The joint session strongly approved the message adopted by the symposium and invited delegations to ensure its wide dissemination within their respective countries. It provided a valuable basis on which to develop a continuing dialogue with the public. The joint session also agreed that, in view of their considerable interest, the papers submitted to the symposium should be published as a supplement to the Timber Bulletin for Europe.

The joint session expressed its appreciation to the Government of Switzerland for the excellent organization of the symposium and the accompanying study visit.

Activities of other Principal Subsidiary Bodies of ECE dealing with problems of concern to the Committee (Item 10 of the Agenda)

In accordance with Commission resolution 1 (XXX) and on the basis of document TIM/R.23, the Timber Committee was informed of the activities of other Principal Subsidiary Bodies of ECE dealing with problems of concern to it, notably by a synoptic presentation of their programme of work. The Committee took note of the document and agreed to take the information presented into account when discussing its programme of work.

The Committee noted the desire of the Senior Economic Advisers to ECE Governments to establish a mutual exchange of views on long-term perspectives, in which the "Overall Economic Perspective" should provide a general framework for sectorial studies, whilst the latter would in turn influence macro-economic prospects. The timber trends study offers the ideal opportunity for such a dialogue, which should be continued in 1976 and 1977, by which time the second version of the "Overall Economic Perspective" will be issued and follow-up action to the timber trends study will be under consideration.

The Committee took note of the fruitful collaboration with the Committee on Housing, Building and Planning for the seminar on industrial production and use of wood-based products in the building industry, Sandefjord (Norway), and with the Conference of European Statisticians for the programme of the Joint FAO/ECE Working Party on Forest Economics and Statistics, both discussed under other agenda items. It requested the Secretariat to draw to its attention any further opportunities for co-operation with other ECE Principal Subsidiary Bodies.

Programme of work and priorities (Item 11 of the Agenda)

(a) For 1975/76

The Committee considered its programme of work for 1975/76 on the basis of Secretariat note TIM/R.24. The delegation of Spain offered to organize the 1976 study tour and the Committee accepted this offer with gratitude. It requested the Spanish authorities to communicate details of the study tour programme to the Secretariat as soon as possible, in order to ensure its timely circulation.

The Committee approved the suggested outline (TIM/R.24/Add.1) for the symposium on the utilization of forest and industrial residues, small-sized wood and bark, provisionally scheduled to be held in Romania from 27 September to 1 October 1976, and agreed that the title be changed to "Symposium on extending the use of wood residues". The Committee requested governments to inform the Secretariat by 31 December 1975 of those items in the outline on which their experts would be willing to prepare papers.

The Committee approved its programme of work and priorities for 1975/76 as set out in Annex II.
Long-term programme of work and priorities for 1977-1981

61. The Committee considered its long-term programme on the basis of Secretariat note TIM/R.24. During the discussion the Committee took into account Commission resolutions 1 (XXX) - Work of the Commission as a whole, 2 (XXX) - Future activities of the Commission and 3 (XXX) - Programme of work of the Commission for 1975/76 and its long-term programme of work for 1977-1981. The programme of work was discussed consecutively with that of the European Forestry Commission to ensure mutually beneficial collaboration.

62. The Committee was addressed by Mr. J. Stanovnik, Executive Secretary of ECE, who reviewed the implications for ECE of the Final Act of the Conference on Security and Co-operation in Europe, held in Helsinki in August 1975 and of General Assembly resolution 3162(S-VII) on development and international economic co-operation adopted unanimously by the Seventh Special Session of the General Assembly.

63. He suggested that the Timber Committee's work programme be reclassified under six main headings:

1. Studies of medium and long-term trends and perspectives
2. Examination of current market developments and prospects, including international trade
3. Studies of selected economic and technological problems and their trends
4. Studies of environmental and resource conservation problems relating to the forest and forest products sector
5. Promotion of international co-operation

64. He also suggested several items which could be incorporated into the programme, oriented along the lines set out above. These included:

- technological forecasting of the effects on the forest products sector of new and prospective methods of production and use, as well as of new types of forest product
- review of the structure of international trade with a view to streamlining the flow of goods
- evaluation of progress made in chemical wood industries and their future potential
- investment and investment needs in the forest industries
- utilization of wood products in construction from the point of view of energy saving.

65. He attached great importance to the question of land-use planning and strongly supported the proposal that a Conference on European land-use be held in 1977 or 1978, jointly with FAO.
66. In view of the broadening of the Timber Committee's activities since its inception, he also offered for the Committee's consideration a suggestion that its title be modified appropriately.

67. The Committee agreed to give careful consideration to the Executive Secretary's statement when formulating its long-term programme of work.

68. The Committee noted that it had collaborated productively with the European Forestry Commission for many years and stressed the necessity of continuing this cooperation. Among other benefits, this would allow it to be kept fully informed of developments in the forest policy field. The two bodies should develop their respective programmes of work so that they are complementary and avoid duplication.

69. As the Committee's co-ordinator had reported that no particular problems as regards the transport and handling of forest products required the Committee's attention at present, the Committee considered that the annual review of the subject should be allotted Priority B. The proposed seminar on the same subject should be merged with the proposed training course on distribution and marketing of forest products. The combined meeting should be held in 1978 or 1979, provided that an offer to act as host country was forthcoming.

70. The Committee recognized that the more rational use of wood could be furthered by a reduction in the number of standard dimensions for sawnwood and by the use of smaller sizes when this was possible. It therefore requested its office-holders to consider whether the Committee could undertake any action on this question. The ad hoc meetings of experts on the standardization of stress grading and finger-jointing of coniferous sawn timber, scheduled for July 1976, should also take the opportunity to consider exploring with ISO further activities in the field of standardization, including rationalization of the number of standard dimensions of sawn softwood.

71. The Committee accepted gratefully the provisional offer of the United Kingdom delegation to host the seminar on the behaviour of wood products in fire and suggested that it take place in 1977. The Committee noted the great importance attached to the subject, most recently by the seminar on the industrial production and use of wood-based products in the building industry. The seminar should pay due attention to the question of building codes and regulations, and their harmonization in technical respects. The Committee felt that a formal meeting in 1976 to prepare for the above seminar might not be necessary, but requested the Secretariat to arrange an informal preparatory group, if appropriate.

72. The Committee took note of the recommendation by the symposium on the modernization of the sawmilling industry that a seminar be held on automatic data processing (ADP) in that industry. Pending confirmation of a tentative offer by Finland to act as host and in order to give the opportunity to study further the doubts expressed by the FAO/ECE Working Party on Forest Economics and Statistics on the need for such a seminar, the Committee agreed to postpone a decision on this matter to its next session.

73. A large number of proposals for future work emanating from meetings organized by the Committee or put forward by delegates to the session were noted. In addition to the projects mentioned in previous paragraphs, the Committee agreed to incorporate the following into its programme on a provisional basis, pending a more detailed review at its next session:

(a) symposium on modernization in the wood-based panels industries;

(b) symposium on economic and technical developments in the furniture industry;
(c) Symposium on harvesting and utilization of the biomass, including stumps (the scope to be reviewed at the Committee's next session in the light of the results of the symposia in Finland and Romania in 1976);

(d) Symposium on increasing efficiency in energy use in the wood-processing industries and in the utilization of forest products.

74. The Committee also agreed to the following modifications to its programme:

(a) The medium-term survey of the markets for sawlogs and sawnwood, scheduled for 1978, should include a survey of the structure and capacity of the sawmilling industry. Countries currently lacking recent information on this subject were invited to consider the possibility of undertaking a special enquiry prior to the circulation of a questionnaire by the Secretariat in 1977;

(b) The eleventh session of the Joint FAO/ECE Working Party on Forest Economics and Statistics should include on its agenda an examination of how forest inventories could be developed to meet the needs not only of the managers of the resource, but also of users of both wood and non-wood benefits and of policy-makers. It should also examine how consistent statistical time series which measure changes in physical and biological systems might be developed;

(c) One or more countries might provide the services of an expert to prepare the study, scheduled for 1977, on the production and utilization of improved wood-based panels, with particular reference to their surface covering;

(d) In the Committee's reviews of forest products markets and allied activities, special attention should be devoted to the trends in industrial technology, trade and utilization of further processed wood products, including packaging materials, building components and furniture; and opportunities examined for increasing international co-operation in these fields;

(e) The Secretariat should explore with interested countries the location of the symposium in 1977 on the effects of pollution on vegetation;

(f) The Committee accepted with gratitude the offer of Poland to organize a study tour in 1978 or 1979;

(g) The following suggestions by the Executive Secretary should be included in the list of special lectures: technological forecasting of prospective methods of production and use of forest products; the structure of international trade; investment and investment needs in the forest industries. His other suggestions were already covered by or were now included under other items in the programme.

75. With regard to other matters which had been raised, the Committee agreed:

(a) To request the Secretariat to discuss with the Norwegian authorities possible follow-up action on the basis of the recommendations of the seminar on industrial production and use of wood-based products in the building industries, for example, the preparation of design and wood products' application manuals;
(b) jointly with FAO, to draw to the attention of the International Union of Forestry Research Organizations (IUFRO) those recommendations of the symposium on "Forests and wood: their role in the environment" which related to research;

(c) to request countries when receiving questionnaires from the Secretariat, to ensure that they were transmitted to the authorities most competent to reply to them;

(d) to request its co-ordinator on standardization matters and the Secretariat to review with the ISO Secretariat the recommendations for further standardization emanating from the symposium on the modernization of the sawmilling industry and the seminar on the industrial production and use of wood-based products in the building industries, to identify possible areas in which current work might be intensified or new work initiated, and to report back to its next session.

76. Finally, in view of the diversity and volume of the proposals relating to its future programme, the Committee invited its office-holders to review the whole question in the light of the probably limited availability of Secretariat resources and expectations that this could be partly offset by assistance from the countries, and to draw up for its next session proposals for a revised programme, indicating the timing and priority to be allotted to each project.

77. The joint session of the ECE Timber Committee and the FAO European Forestry Commission expressed serious concern over the difficulties which would have to be faced in implementing their programmes in the 1976/77 biennium as a result of the reduced number of staff members provided by FAO to the joint secretariat, the ECE/FAO Timber Division. Particularly affected was the servicing of the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers. The issues with which this Committee has to deal, form an integral part of the sophisticated problems of forest management, environmental issues and the technology of forest industries and their products in the European region, which is the work of the ECE/FAO Timber Division. The joint session recognized that staff reductions also seriously limited the attention which could be given by the ECE/FAO Timber Division to the transfer of technological knowledge to the less developed regions of the world and the efforts given to the development of industry and trade in those regions.

78. The joint session was particularly alarmed at the continuous decline in the share of forestry in FAO's programme and budget and recognized in this a major reason for the adverse staffing situation in Europe. The Timber Committee and the European Forestry Commission appealed urgently to FAO to reconsider its forestry staffing budget, particularly in reference to the ECE/FAO Timber Division.

79. The joint session also urged that delegates draw the attention of their delegations to other FAO bodies to this question.
Any other business (Item 12 of the Agenda)

80. The delegation of Switzerland presented a film entitled "Living with Wood". The Committee thanked the delegation for this presentation.

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

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

Date of next session

82. The Committee agreed that its next session should take place from 18 to 22 October 1976, subject to the availability of conference services for that week.
### ANNEX I

Europe (excl. USSR): Summary table of market forecasts for 1975 and 1976
(million m³)

<table>
<thead>
<tr>
<th></th>
<th>Domestic requirements</th>
<th>Production</th>
<th>Imports</th>
<th>Exports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gymn softwood</td>
<td>75.60</td>
<td>66.45</td>
<td>68.67</td>
<td>70.32</td>
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<tr>
<td>Gymn hardwood</td>
<td>20.67</td>
<td>19.21</td>
<td>20.12</td>
<td>18.86</td>
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<tr>
<td>-Temperate-zone</td>
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<tr>
<td>-Tropical</td>
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<tr>
<td>Hardwood logs</td>
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<tr>
<td>-Temperate-zone</td>
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<tr>
<td>-Tropical</td>
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<td></td>
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<tr>
<td>Plywood</td>
<td>4.80</td>
<td>4.37</td>
<td>4.61</td>
<td>3.84</td>
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<tr>
<td>Fibreboard</td>
<td>4.69</td>
<td>4.44</td>
<td>4.65</td>
<td>4.60</td>
</tr>
<tr>
<td>Plutwood</td>
<td>156.20</td>
<td>143.37</td>
<td>155.55</td>
<td>147.55</td>
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<tr>
<td>-Round &amp; split¹</td>
<td>117.00</td>
<td>110.07</td>
<td></td>
<td>109.15</td>
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<tr>
<td>-Residue, chips &amp; particles</td>
<td>39.20</td>
<td>33.30</td>
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<td>38.40</td>
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<td>Coniferous logs</td>
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¹ Including USSR exports

¹ Estimated by Secretariat on basis of incomplete information
ANNEX II

PROGRAMME OF WORK AND PRIORITIES FOR 1975/76

Note: The programme of work and priorities for 1975/76, set out below, covers the period between the Committee's thirty-third and thirty-fourth sessions. It also contains details of the short-term programmes of work of the Committee's two main continuing subsidiary bodies, the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers and the Joint FAO/ECE Working Party on Forest Economics and Statistics.

Below are listed the projects to be undertaken in 1975/76. (The joint projects for which FAO and ILO are primarily responsible do not figure on this list).

14.1 CONTINUING PROJECTS AND ACTIVITIES

14.1.1 Forest products market reviews and allied questions (Priority A, except where otherwise shown) 1/

Description: (a) The Committee at its thirty-fourth session in 1976 will review the market in the ECE region for sawn softwood, hardwoods (including tropical), pulpwood, coniferous logs and wood-based panels (plywood, fibreboard and particle board).

(b) The Secretariat will prepare a review of the forest products market in the ECE region covering the period 1975 to March 1976.

(c) The Secretariat will prepare the bi-annual Timber Bulletin for Europe (to be published in May/June and October/November) containing quarterly statistics relating to production, trade and prices of the main forest products in Europe and North America.

(d) The Secretariat, jointly with FAO, will complete and publish the study of timber trends and prospects in the ECE region, 1950-2000.

(e) A study will be prepared on the utilization of forest and industrial residues and chips, small-sized wood and bark (in connexion with the symposium on extending the use of wood residues to be held in Romania in 1976).

The Committee will review at its thirty-fourth session developments in the

(f) transport and handling (Priority B), and

(g) standardization of forest products.

(h) A special lecture on a subject of interest to the Committee will be delivered at its thirty-fourth session.

1/ Priorities - A: High priority; B: Priority; C: Lesser priority.
14.1.2 Technical and economic aspects of the wood-working industries (Priority A)

Description: Many of the Committee's activities in this field are covered by the Provisional Group of Experts on the Wood-working Industries, whose sessions will be convened on the instructions of the Timber Committee.

(a) The fifth session of the Provisional Group of Experts will revise the ECE standard for the stress grading of coniferous sawnwood, according to the instructions given by the thirty-third session of the Committee.

(b) The fifth session of the Provisional Group of Experts will also discuss a draft ECE standard for finger-jointing of structural coniferous sawnwood.

(c) A symposium will be held in Romania on extending the use of wood residues.

(d) A study tour will be held in Spain.

14.1.3 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.

(a) The Joint Committee will hold its eleventh session in Finland, with a symposium on the harvesting of a larger part of the forest biomass, including clearing aspects.

(b) The Study Group on Mechanization of Forest Work will hold its seventh session. Part of this session will be held with the Study Group on Methods and Organization of Forest Work.

(c) A seminar will be held on the pedagogic and organizational problems of forest worker training.

(d) A seminar will be held on practical mathematical methods in forest planning and control.

14.1.4 Forest and forest products economics and statistics

Description: The activities of the Committee in this field are covered by the work of the Joint FAO/ECE Working Party on Forest Economics and Statistics, which deals with various statistical and economics problems at the ECE regional level, which are referred to it by the Timber Committee and the FAO European Forestry Commission, as well as by the Conference of European Statisticians.

Work will continue, as recommended by the Working Party at its tenth session, on the following items (priority in brackets)

(a) environmental benefits of the forest (A)

(b) classification and definition of forest products (A)

(c) conversion factors of forest products (A)

(d) improvement of international comparability of removal statistics (A)

(e) forest resource analysis (A)

(f) cost and price statistics (A)
(g) labour statistics in forestry (B)
(h) improvement of organization and periodicity of statistical data collection (B)
(i) statistics on consumption and deliveries (B)
(j) end-use statistics (B)
(k) impact of taxation on the efficiency of forest management and on wood supply (B).
LONG-TERM PROGRAMME OF WORK AND PRIORITIES FOR 1977-1981

Introductory note

Below are listed the projects, primarily the responsibility of the ECE Timber Committee, to be undertaken during the period 1977-1981 included in the long-term programme of work and priorities. The work programme of 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. 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).

14.1 CONTINUING PROJECTS AND ACTIVITIES

14.1.1 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 reviews 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, handling and standardization of forest products will be kept under review. The Committee will keep under review long-term developments in the timber sector and publish periodic studies on this subject. The Committee will also hold symposia on subjects of importance to the timber sector.

14.1.2 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, including advice to the Committee on the implementation and co-ordination of its activities in the field of the wood-working industries, product development and utilization, assistance 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 and seminars.

14.1.3 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.
14.1.4 Forest and forest products economics and statistics

Description: The activities of the Committee in this field are covered by the activities of the Joint FAO/ECE Working Party on Forest Economics and Statistics which deals with various statistical and economic problems in the ECE region which are referred to it by the Timber Committee and the European Forestry Commission of FAO, as well as the 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, methodologies for use in economic analysis, economic studies assigned to it by its parent bodies, and computerization in forestry and forest industries. Sessions of the Working Party will usually be held once every two years.
### Annex III

#### Table A - Timber Committee Programme of Work

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<td>Forest products market reviews and allied questions</td>
<td>Review by the Timber Committee at its annual sessions of the markets in the ECE region for sawn softwood, hardwoods (including tropical), pulpwood and coniferous logs, plywood, fibreboard and particle board. Annual review of the forest products market by the Secretariat (with supplementary publications), together with quarterly statistics relating to production, trade and prices of forest products in the region. Annual review of the Committee of development in transport, handling and standardization of forest products. Periodic compilation and publication by the Secretariat of market reports on particular countries, commodities and market sectors.</td>
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<td>14.1.1</td>
<td>General activities</td>
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<td>14.1.1</td>
<td>Special reviews and studies</td>
<td>Completion and publication of study of timber trends and prospects in the ECE region, 1950-2000 (jointly with FAO), Utilization of forest and industrial residues and chips, small-sized wood and bark, Wood-based panels (including sixth survey of the structure and raw material consumption of these industries - carried out jointly with FAO), Production and utilization of improved wood-based panels, with particular reference to the surface covering of panels, Sawmills and sawlogs (including survey of sawmill industry structure and capacity), Pulpwod (including residues and chips), pitprops and miscellaneous roundwood, Wood-based panels (including seventh survey of the structure and raw material consumption of these industries - carried out jointly with FAO).</td>
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<td>14.1.1</td>
<td>Special lectures</td>
<td>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: structure of the forest economy, 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, wood preservation, timber accounting and selection of wood raw material during logging and primary conversion and optimization of the structure of forest enterprises.</td>
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<td>14.1.2</td>
<td>Technical and economic aspects of the wood-working industries</td>
<td>Covered by the activities of the Provisional Group of Experts on the Wood-working Industries (Sessions to be convened on the instructions of the Timber Committee).</td>
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<td>Meetings</td>
<td>Fifth session 2/</td>
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<td>14.1.2</td>
<td>Study tours in the following countries</td>
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<td>Italy</td>
<td>Poland</td>
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<td>14.1.2</td>
<td>Symposia, training courses and seminars</td>
<td>Romania</td>
<td>United Kingdom (provisional) Seminar: The behaviour of wood products in fire</td>
<td>Seminar: Increasing efficiency in energy-use in the wood-processing industries and in the utilization of forest products</td>
<td>Seminar: Modernisation in the wood-based panels industries</td>
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### TABLE B - SUBSIDIARY BODIES OF THE COMMITTED PROGRAMME OF WORK

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<td>Main meetings</td>
<td>Finland</td>
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<td></td>
<td>Eleventh session of the Joint Committee, including a symposium on harvesting of a larger part of the forest biomass, including clearing aspects.</td>
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<td>14,1,3</td>
<td>Meetings of study groups</td>
<td>Mechanization of forest work (seventh session) (part of which with the Study Group on the Methods and Organization of Forest Work)</td>
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<td>Methods and organization of forest work (ninth session)</td>
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<td></td>
<td>Vocational training and prevention of accidents in forest work (eleventh session)</td>
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<td>14,1,3</td>
<td>General training and seminars</td>
<td>Pedagogic and organizational problems of forest worker training</td>
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<td></td>
<td>Practical mathematical methods in forest planning and control</td>
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<tr>
<td>14,1,4</td>
<td>Forest and forest products economics and statistics</td>
<td>Covered by the activities of the Joint FAO/ECE Working Party on Forest Economics and Statistics, which deals with problems referred to it by the Timber Committees and the FAO European Forestry Commission, as well as by the Conference of European Statisticians</td>
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<tr>
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<td>General activities</td>
<td>Problems under consideration statistical methodology and co-ordination, matters concerning the comparability and uniformity of forest products statistics, their collection and publication, methodologies for use in economic analysis, economic studies, as well as special projects referred to it by the parent bodies. (For particulars of the Working Party's programme of work see TIM/EFC/WP, 2/4)</td>
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<td>Sessions of the Working Party</td>
<td>Eleventh session</td>
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<td>Special studies and projects</td>
<td>Work to be carried out according to instructions of sessions of the Working Party on the following projects (for details see TIM/EFC/WP, 2/4): environmental benefits of the forest; classification and definition of forest products; conversion factors for forest products; international comparability of removal statistics; forest resource analysis; cost and price statistics; labour statistics in forestry; improvement of the organisation and periodicity of statistical data collection; statistics on consumption and deliveries; end-use statistics; impact of taxation on the efficiency of forest management and wood supply; electronic data processing (EDP) in forestry and the forest industries; forest fire statistics; other projects.</td>
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3/ Host country to be decided,