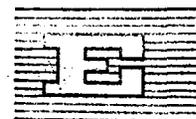


UNITED NATIONS  
ECONOMIC  
AND  
SOCIAL COUNCIL



RESTRICTED  
ECE/TIM/11  
4 November 1977  
Original : ENGLISH

ECONOMIC COMMISSION FOR EUROPE

TIMBER COMMITTEE

REPORT OF THE THIRTY-FIFTH SESSION

held at Geneva from 17 to 21 October 1977

As approved by the Committee

Table of contents

	<u>Paragraph</u>
Introduction	1
Adoption of the Agenda	7
Election of officers	9
Matters arising out of the thirty-second session of the Commission	10
Activities of other international bodies relevant to the work of the Committee	11
Review of activities since the thirty-fourth session of the Committee:	
(a) Eleventh session of the Joint FAO/ECE Working Party on Forest Economics and Statistics	17
(b) Seminar on the behaviour of wood products in fire	21
(c) Preparatory meeting for the Symposium on efficiency in energy use in forestry and the wood-working industries	26
(d) <u>Ad hoc</u> meeting on standardization of stress grading and finger-jointing of coniferous sawnwood	28
(e) Study tour in Italy	36
(f) Study on the trade and utilization of tropical hardwoods	37
(g) Medium-term survey of the wood-based panels sector	39
Market review and prospects	43
Follow-up to European Timber Trends and Prospects, 1950-2000	54
Special lecture	58
Activities of other Principal Subsidiary Bodies of ECE of interest to the Timber Committee	61

Table of contents (continued)Paragraph

Programme of work for 1978-1982	62
Other business	76
Adoption of the report of the Committee's session	77
Date of next session	78
Films	79
Annex I - Europe (excluding USSR): Summary table of market forecasts for 1977 and 1978	
Annex II - Timber Committee programme of work for 1978-1982	
Annex III - Tabular presentation of Timber Committee programme of work for 1978-1982	

## Introduction

1. The Timber Committee held its thirty-fifth session in Geneva from 17 to 21 October 1977. The session was attended by representatives from the following ECE countries: Austria; Belgium; Byelorussian Soviet Socialist Republic; Canada; Czechoslovakia; Finland; France; German Democratic Republic; Germany, Federal Republic of; Greece; Hungary; Ireland; Italy; Luxembourg; Netherlands; Norway; Poland; Portugal; Romania; Spain; Sweden; Switzerland; Turkey; Ukrainian Soviet Socialist Republic; Union of Soviet Socialist Republics; United Kingdom of Great Britain and Northern Ireland; United States of America; Yugoslavia. <sup>1/</sup>
2. The following United Nations and specialized agencies were represented: United Nations Conference on Trade and Development (UNCTAD); the International Labour Organization (ILO); the Food and Agriculture Organization (FAO); UNCTAD/GATT International Trade Centre (ITC).
3. The following intergovernmental organization participated: The European Economic Community (EEC).
4. The following non-governmental organizations were represented: the European Federation of Plywood Industries (FEIC); the European Federation of Associations of Particle Board Manufacturers (FESYP); the Organization of European Sawmilling Industries (OES).
5. The Chairman of the Timber Committee, Mr. F. Palmer (United Kingdom) opened the session and welcomed delegates.
6. The Committee paid homage to the memory of Mr. Gleb Nikolaev, Vice-Chairman of V/O Exportles, for many years delegate of the USSR to the Committee.

## Adoption of the Agenda (Item 1 of the Agenda)

7. The provisional agenda (ECE/TIM/10) presented by the secretariat, was adopted.
8. The Committee noted that it had not been possible to process issue some of the basic documents prepared in connexion with its session until very shortly before the opening of the session, thus leaving insufficient time for delegations to study them in advance. The Committee regretted this situation and hoped that measures would be taken to improve it.

## Election of officers (Item 2 of the Agenda)

9. The Committee re-elected Mr. F. Palmer (United Kingdom), Chairman, and Mr. V. Nemtsov (USSR) and Mr. A. Froncillo (Italy), Vice-Chairmen.

---

<sup>1/</sup> Further details on participation may be obtained from the secretariat: ECE/FAO Timber Division, Palais des Nations, CH-1211 Geneva 10.

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

10. The Committee was informed of the Commission's discussion of its work, and took note of the resolution and decisions of the Commission, on the basis of document TIM/R.30. The Committee agreed to take account of these discussions, resolution and decisions in its session, and notably when deciding on its programme of work.

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

11. The Committee was informed of the forthcoming FAO Regional Conference for Europe to be held in September 1978 at Lisbon (Portugal). A main concern of the Conference would be to evaluate the long-term policy implications of the study European Timber Trends and Prospects, 1950 to 2000, which had been prepared under the joint auspices of the Timber Committee and the FAO European Forestry Commission. The results of the FAO Regional Conference would be of great relevance to the Timber Committee in its work on long-term trends in the European forest industries. The Committee suggested that delegates draw the attention of their competent national authorities to the Conference, and to the suggestion of the FAO Committee on Forestry that forestry and timber interests should be represented at the Conference.

12. The Committee was informed of the results of the eighteenth session of the FAO European Forestry Commission which had taken place in Rome from 13 to 17 September. The Committee welcomed the continuing close collaboration between the two bodies in many fields and took note of those items which the Commission had proposed should be carried out jointly. It agreed that these suggestions should be discussed under item 10 of its Agenda: programme of work 1978-1982.

13. The Committee was also informed of the other FAO activities, notably the results of the FAO Expert Consultation on World Pulp and Paper Demand, Supply and Trade, which was held in Tunis from 20 to 22 September 1977, and of the preparations for the FAO Committee on Wood-Based Panel Products, to be held in Rome from 9 to 11 November 1977.

14. The representative of UNCTAD informed the Committee of the results of the Preparatory Meeting on Tropical Timber, held from 23 to 27 May 1977, in the framework of the UNCTAD Integrated Programme on Commodities. A further meeting, at expert level, was due to be held from 24 to 29 October 1977.

15. The representative of the UNCTAD/GATT International Trade Centre briefed the Committee on progress toward the establishment of a Tropical Timber Bureau. There is to be a meeting on this question in Geneva from 31 October to 11 November 1977.

16. The Committee was informed by the representative of the ILO that that Organization had recently published a Code of Practice for the protection of workers against noise and vibration in the working environment, problems which were of concern to forestry and the timber industries. ILO would also publish shortly a Code of Practice on the safe construction and use of chain saws, which was based on work carried out under the aegis of the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers.

Review of activities since the thirty-fourth session of the Committee (Item 5 of the Agenda)

(a) Eleventh session of the Joint FAO/ECE Working Party on Forest Economics and Statistics

17. The Chairman of the Joint FAO/ECE Working Party on Forest Economics and Statistics, Mr. E. Clicheroux (Belgium), presented the report of its eleventh session (TIM/EFC/WP.2/6) held in Geneva from 31 May to 3 June 1977. The Committee approved the report of the Working Party. It requested that the Working Party consider at its next session, the proposal of the USSR relating to the efficiency in use of new methods in forest operations, to the economic appraisal of complete utilization of wood raw material, both for wood products and for energy, and to the study of trends in investment in the forestry and forest industry sectors. The Working Party should formulate proposals on the incorporation of these subjects in its programme of work. The Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers should also consider these proposals at its twelfth session in 1978, as it appeared that some of them belonged more to the sphere of interest of the Joint Committee than to that of the Joint Working Party.

18. The Committee welcomed the Working Party's proposals on the collection and dissemination of statistics. These proposals were intended to simplify the work of national statistical offices and assist the timely return of questionnaires, to concentrate the presentation in the Timber Bulletin for Europe on the most important products and to facilitate speedy publication. The Committee instructed the secretariat to modify the procedures for the collection and publication of statistics along the lines indicated in TIM/EFC/WP.2/6, annex I, paragraph 4. In addition, space should be made available in the January-June issue to include January-December trade flow data which had not arrived in time for inclusion in the previous issue. The Committee agreed:

- (i) that the Bulletin should continue to be issued twice each year
- (ii) to ask countries to inform the secretariat which units were actually responsible for filling in questionnaires, which would facilitate direct contact when necessary
- (iii) that unofficial statistics or secretariat estimates, identified as such, be included when official data have been delayed.

19. The Committee noted that the Working Party had discussed a proposal for short-term statistical reporting, put forward by the Timber Trade Federation of the United Kingdom (TIM/EFC/WP.2/6, annex I, paras 6, 7). The collection of such statistics would be dependent on the active support and collaboration of trade and industry associations or agencies. As it was understood that this matter was under consideration elsewhere, the Committee decided to await specific recommendations from Governments before taking further action.

20. The Committee approved a questionnaire on the structure and capacity of the sawmilling industry (TIM/EFC/WP.2/R.23/Rev.1), which had been presented in draft form at the Working Party's session and simplified on the basis of comments made. The questionnaire should be circulated in order to collect data for the first survey of the structure and capacity of the sawmilling industry, scheduled for 1978, in conjunction with the medium-term survey of the markets for sawnwood and sawlogs.

(b) Seminar on the behaviour of wood products in fire

21. The Committee was informed of the results of the seminar, held in Oxford from 22 to 25 March 1977 at the invitation of the Government of the United Kingdom (report of the seminar : TIM/SEM.6/2). The Committee expressed deep appreciation to the Government of the United Kingdom for the excellent organization of the seminar, including a one-day study visit to the Timber Research and Development Association (TRADA) and the Fire Research Station of the Building Research Establishment.

22. The Committee endorsed the report of the seminar, including the recommendations for future action set out in paragraphs 13 to 22 of the report. It noted with approval that provision had been made for the seminar's report to be drawn to the attention of the ad hoc meeting on fire protection regulations, standards and research (Budapest, 14-18 November 1977) being organized by the Committee on Housing, Building and Planning. The need for a comprehensive look at the problem of fire protection, emphasized by the seminar, would be one of the aims of the ad hoc meeting, which would work within the context of the ECE project on the harmonization of the technical content of building regulations. The implications of the current harmonization work on specific materials would be of special significance since the project was seen as an integral part of Work Area 08.5 of the Committee on Housing, Building and Planning, "The promotion of international trade in building products and know-how".

23. The Committee agreed to draw the seminar's recommendations to the attention of the organizations indicated as follows :

- (a) to the Committee on Housing, Building and Planning and CIB W.14 on improving and standardizing the methods of compiling and the analyses of routine reports on fires in buildings;
- (b) to IUFRO on the co-ordination of research on the behaviour of wood products in fire;
- (c) to CIB on the development of predictive design methods for structural stability in fire;
- (d) to ISO TC 92 on fire tests for building materials. It supported the suggestion that timber interests should seek more direct access to the deliberations of ISO TC 92 through such organizations as CIB and CEI-Bois offering to assist in the work of that body.

24. The Committee considered that the useful results achieved at the seminar should form the basis for further work, notably aimed at the harmonization of national building regulations including terminology and definitions used in codes and regulations, and testing methods. The Committee might have a role to play in monitoring and supporting work in this field. It agreed accordingly to consider whether to make provision for such activities under item 10 of its Agenda.

25. The Committee was informed that the papers presented to the seminar had been published in English only, by Pergamon Press. <sup>1/</sup> It had, unfortunately, not been possible for the papers to be published by the United Nations for the reasons set out in paragraph 69.

(c) Preparatory meeting for the Symposium on efficiency in energy use in forestry and the wood-working industries

26. The Committee was informed of the results of the preparatory meeting on the basis of its report (TIM/WP.3/AC.4/2). It stressed the importance of the problems to be discussed, and the timeliness of the Symposium. Some delegations proposed that item 5 of the provisional agenda proposed for the Symposium: the use of wood, including residues, as a source of energy, be expanded to reflect the potential interest of such questions as the use of wood or forest biomass to produce liquid or gaseous fuel or electricity and the increasing interest in energy generation from all types of wood residues. The Committee agreed that the agenda of the Symposium should be so modified. It requested countries to transmit to the secretariat as soon as possible the names of national experts who would be prepared to present papers, and in any case before 31 December 1977. The papers themselves should reach the secretariat by 30 June 1978, as the symposium was scheduled for November/December 1978.

27. The Italian delegation confirmed that its country was prepared to act as host to the symposium. The Committee thanked the Italian delegation for its generous offer and requested it to make the necessary practical arrangements with the secretariat.

(d) Ad hoc meeting on standardization of stress grading and finger-jointing of coniferous sawnwood

28. The Committee was informed of the results of the ad hoc meeting and approved its report (TIM/WP.3/AC.3/8), notably the texts of the ECE recommended standard on stress grading of coniferous sawn timber (annex I) and the ECE recommended standard for finger-jointing in structural coniferous sawn timber (annex II). The Committee agreed to publish the two recommended standards, as supplements to the Timber Bulletin for Europe, and recommend to member countries that they incorporate their provisions into national standards, with a view to facilitating international trade in stress graded and finger-jointed structural coniferous sawn timber.

---

<sup>1/</sup>Details on how to order the publication are available from the secretariat.

29. The delegations of the United States and Canada expressed their support in principle of the Committee's work on standardization, but repeated their reservations about the two ECE recommended standards in question and stated that they were not appropriate for use in North America in their present form. The delegation of Poland also expressed its reservations about both standards, notably as regards density limitations in the stress grading document and the introduction of stipulations about production methods for finger-jointing. The delegation of the USSR re-affirmed the reservations expressed by its delegation to the ad hoc meeting (paras 11 and 18). When these reservations had been taken into account, it would be possible to transmit the recommended standards to ISO TC 55 with a proposal that they be adopted as ISO International Standards.

30. The Committee, while recognizing that a few countries were not yet in a position to apply the recommended standards, considered that experience in their practical application would be valuable in working towards the eventual objective of an ISO International Standard, in which the remaining differences, such as those which still exist between the ECE recommended standard on stress grading and the North American Lumber Grading Rules, could be reconciled.

31. The Committee also endorsed the meeting's suggestions as regards further work in the field of research, quality control and marking for stress grading and finger-jointing. It therefore requested countries which had not yet done so to supply to the secretariat by 31 December 1977, material covering both stress grading and finger-jointing, on:

- (i) research programmes, in hand or planned
- (ii) quality control programmes, in use or under development
- (iii) marking systems in use.

In addition, the Committee requested countries to nominate by 31 December 1977 correspondents, one for stress grading and one for finger-jointing, to streamline contacts with the secretariat and between countries on these questions.

32. The Committee also agreed to convene two informal teams of experts, one for stress grading and one for finger-jointing, to draw up proposals for further action in the fields of research, quality control and marking, as well as for seminars or training courses in stress grading and finger-jointing, as recommended by the ad hoc meeting. The Committee requested interested countries to nominate experts who would serve in an individual capacity on one or other of the informal teams. Such nominations should be received by 31 December 1977.

33. The Committee also agreed to convene an ad hoc meeting after 1980 to review and if necessary revise the recommended standards on the basis of experience gained.

34. The Committee also agreed to carry out a simple enquiry on which dimensions of sawn softwood were in common use for international trade, as outlined in paragraph 20 of TIM/WP.3/AC.3/8. It recognized that progress might be slow and agreed to consider at its thirty-sixth session in 1978, on the basis of the enquiry results, how to proceed with the work on the reduction of the number of standard dimensions of sawnwood entering international trade and the likely time needed for it.

35. The Committee recorded its deep appreciation to Mr. W. Townsley (Canada), Chairman of the ad hoc meeting, and the experts who had contributed to the drawing up of the recommended standards, for the considerable efforts they had made in order to achieve positive results.

(e) Study tour in Italy

36. The Committee was informed of the study tour in Italy which had been held from 18 to 26 September 1977. There had been 44 participants from 15 countries. The participants were able to study typical features of forestry, timber and associated industries in Calabria where most of the tour took place. The Committee expressed its gratitude to the Government of Italy for a particularly well organized and interesting study tour and also for the generous hospitality extended to participants.

(f) Study on the trade and utilization of tropical hardwoods

37. The secretariat presented a draft of the study (TIM/R.31 and Add.1). For reasons of economy, the draft contained only those parts of the study dealing essentially with utilization aspects (Chapters 3, 5 and 6). As part of the follow-up to European Timber Trends and Prospects, 1950 to 2000, the study aimed at giving in depth analysis of the trade in tropical forest products, including the most recent developments which had emerged in this field, as well as a detailed picture of the utilization of imported logs and of processed products in different end uses. Therefore, the study should be of interest not only to those concerned with forest products in the ECE region, where tropical hardwood products had been playing an increasingly important role in a number of end uses, but also to experts in developing countries supplying such timber.

38. The Committee, taking note of the draft study, emphasized the importance it attached to this sector of forest products. It underlined the value of the findings of the study and their particular interest for those concerned with the research, production or trade of tropical hardwoods and especially for developing countries which were actual or potential suppliers of forest products to the region. The Committee decided that the study should be published as a supplement to the Timber Bulletin for Europe. It asked countries to examine the study carefully, in particular the information relating to individual countries and invited them to make supplementary information available to the secretariat where this was possible. Such information, as well as comments and suggestions for amendments, should reach the secretariat not later than 30 November 1977, in order that the final version of the study could be completed according to schedule.

(g) Medium-term survey of the wood-based panels sector

39. The secretariat presented to the Committee the data which had been received from countries on the structure and capacity of the wood-based panels industries, their raw material use and forecasts of medium-term trends in production, trade and consumption (TIM/R.32 and Add.1). The Committee deeply regretted that many countries had not replied to the questionnaire circulated or had transmitted incomplete replies, making satisfactory analysis at the regional level difficult. This could be only partly accounted for by the recession in the wood-based panels sector.

40. The available data had been transmitted to FAO for inclusion in the world-wide survey of the structure and capacity of the wood-based panels industries which was being prepared for the FAO Advisory Committee on Wood-based Panel Products which meets in November 1977. The Committee requested the secretariat to draw the attention of the FAO body to its own discussion of this problem and to the fact that it seemed to be becoming more difficult for some countries to supply satisfactory replies to Timber Committee and other international questionnaires (see the report of the Joint FAO/ECE Working Party on Forest Economics and Statistics, (TIM/EFC/WP.2/6, paras 56-7).

41. The Committee reaffirmed, however, its interest in studies of industry structure, capacity and raw material use and therefore requested countries which had not replied or had returned incomplete replies to transmit all available data to the secretariat by 30 November 1977. It considered that where forecasts of capacity were not available notably because of uncertainty about market trends, it was still useful to show data on present capacity. The Committee noted that adequate data were available for a review of past trends in production, trade and prices of wood-based panels and for comparisons of actual results with long-term projections, and requested the secretariat to complete the medium-term survey and to include these trends as well as available data on structure, capacity and raw material. This survey should be published as a supplement to the Timber Bulletin for Europe

42. In view of the unsatisfactory data situation, however, the Committee decided that the whole question should be re-examined before work started on the next survey of structure, capacity and raw material consumption, scheduled for 1980.

#### Market review and prospects (Item 6 of the Agenda)

43. Each delegation was invited to give a brief introduction of its written statement on the forest products market. The Committee took note during its discussion of the Annual Forest Products Market Review (supplement 1 to Volume XXX of the Timber Bulletin for Europe), prepared by the secretariat, and of the brief comments on recent developments in the market submitted by the secretariat in TIM/CRP.26. It drew up tables of countries' estimates for 1977 and 1978 of domestic requirements, production, imports and exports of sawn softwood, hardwood logs and sawnwood, particle board, plywood, fibreboard, pulpwood and coniferous logs. Following the proposal of the Committee's office-holders, countries provided estimates of domestic requirements and production of hardwood and coniferous logs, thus bringing the treatment of these products into line with the others dealt with by the Committee. A summary table of the estimates is presented in annex I.

44. Another innovation in conducting the discussion on the market was tried out on the suggestion of the office-holders. At the invitation of the secretariat, a number of countries nominated experts to serve on discussion panels, one for each of the market sectors; sawn softwood, hardwoods, wood-based panels, and pulpwood and coniferous logs.

45. The Committee took note of the general economic conditions in the ECE region which underlay the development of the forest products market. The initial stage of recovery in western Europe from the deep recession of 1974/75, which occurred during late 1975 and the first half of 1976, had proved to be brisk but short-lived. By autumn 1976, growth in western Europe as a whole had again become sluggish, and since then the rate of growth of Gross Domestic Product (GDP) has been about 3 per cent. This has been insufficient to relieve the high levels of unemployment in many countries. Inflation, however, has tended to ease somewhat, although cost of living increases in several western European countries are still a cause for concern. Capital investment remains sluggish, a result of the continued slack in industrial capacity utilization rates. Construction activity remains at a low level in most countries.

46. In North America and in eastern Europe and the USSR, economic growth has been stronger than in western Europe. In the centrally planned economies, expansion is proceeding along the lines laid down in the national five-year plans for 1976-1980, namely about  $6\frac{1}{2}$  per cent per year for Net Material Product in eastern Europe and  $4\frac{1}{2}$  - 5 per cent in the USSR. In the United States, GDP has been expanding at about 5 per cent since mid-1977 and this rate is expected to be maintained in 1978. Dwelling construction is continuing strongly with the number of single-family housing starts having reached a high level in 1977.

47. The forest products markets reflect these differing regional conditions. In North America, consumption of most forest products in 1977 will approach or even exceed previous record levels. Consumption in 1978 is expected to be slightly below these volumes.

48. In Europe (excluding the USSR), the Committee's estimates of consumption for 1977 and 1978 are, for most products, not markedly different from the 1976 levels. Consumption therefore appears to be on a plateau appreciably above the depressed level of 1975. Estimated domestic requirements of sawn softwood in Europe, for example, are in the range of 72 to 73 million m<sup>3</sup> for the period 1977-1978, which compares with apparent consumption of 67.5 million m<sup>3</sup> and 78.8 million m<sup>3</sup> in 1973. After falling slightly in 1977, sawn softwood requirements are expected to recover in 1978. A similar trend is foreseen for plywood. Some variations from the general trend may be noted. Domestic requirements of sawn hardwood, which are estimated to rise slightly from 21.1 million m<sup>3</sup> in 1976 to 21.9 million m<sup>3</sup> in 1978 would, at the latter level, be almost back to the record 1973 volume. For particle board, European requirements are forecast to rise by 1 million m<sup>3</sup> over the two years to 1978 to reach 22.7 million m<sup>3</sup>. While growth since 1973 has slowed down considerably compared with the rate in the 1960s and early 1970s, the particle board market has reached new high levels each year except 1975 and this upward tendency should be maintained in 1977 and 1978. Consumption of pulpwood in Europe, after remaining unchanged between 1976 and 1977, is forecast to rise by over 4 per cent in 1978 to 160 million m<sup>3</sup>.

49. Year to year fluctuations in Europe's trade of forest products have often been large in recent years, and in any event much more marked than changes in consumption. Thus, in 1976 imports and exports staged a strong recovery, but it appears that much of the increased availability in importing countries was used to replenish distributors' and consumers' stocks. With renewed uncertainties about the course of events, a more cautious hand-to-mouth purchasing policy had become evident in 1977. Imports are now estimated to be lower in 1977 than in 1976 in the case of sawn softwood, wood-based panels and pulpwood, and to be little changed for hardwoods. In 1978, volumes of exports and imports of most forest products are forecast to recover slightly from the 1977 levels.

50. In the course of an animated debate on the problems arising from the prolonged difficult period through which the European forest and forest products economy is passing, a number of important points were raised. Amongst these were the adjustments needed to adapt supply to current and foreseen levels of demand. Under-utilization of capacity and a cost/price squeeze are common phenomena throughout the forest and forest industry sector, with the problem being particularly acute for wood-based panels, woodpulp and certain paper grades. Structural rationalization of the industry, including the closing down of some mills, could be expected to bring supply into better balance with demand, while much could be done to improve products' acceptability to the consumer, through further product development, production of specialities, diversification of markets and market research. These could only be effective in the medium to long term, however.

51. It was suggested that more attention could be drawn to the problem of over-capacity in certain industry sectors, and to the difficulties of relating individual country or industry investment plans to regional consumption projections, such as those in European Timber Trends and Prospects, 1950 to 2000, as well as to national raw material supply possibilities.
52. Fluctuations in exchange rate parities also created uncertainties and difficulties to traders in both exporting and importing countries.
53. In order to help industry to plan its production and thereby achieve a more orderly development of the market over the short term, it was felt that delegations to the Timber Committee, notably those of the major consuming and importing countries might provide clearer indications of government economic policy, especially in conditions such as the present when reflationary measures are being planned or considered in a number of countries.

Follow-up to European Timber Trends and Prospects, 1950-2000 (Item 7 of the Agenda)

54. The Committee took note of the secretariat paper TIM/R.33, which set out proposals for follow-up to European Timber Trends and Prospects, 1950 to 2000 (ETTS III). It noted that most of the items arising from the study were already incorporated in the programme of work and agreed to the modifications to the programme suggested in the secretariat paper.
55. In view of the serious difficulties associated with obtaining comprehensive information on end-uses and yet the importance attached to having data in this area, the Committee agreed to attempt a new approach to the problem, namely to obtain, by means of a simple enquiry, estimates of the breakdown of consumption of each forest product by main end-uses. The results of this enquiry should be examined by the twelfth session of the Joint FAO/ECE Working Party on Forest Economics and Statistics, which should formulate proposals on further work in this field.
56. The Committee agreed that knowledge of trends in individual countries would be improved by periodic "country forest and forest product profiles", to be prepared by the secretariat in collaboration with the countries concerned.
57. It was agreed that the periodic appraisal of actual trends in relation to the projections of ETTS III should include the analysis of trends at the sub-regional and country level. In this connexion, the Committee noted that the grouping of countries in ETTS III did not fully correspond with individual countries' particular interests and problems; the Alpine region was quoted as an example. It was felt that more attention should be given in the Committee's programme of work to sub-regional matters. It was suggested that, in some cases, this could be achieved by the Committee being informed of activities carried out by other bodies within these sub-regions. In other cases, the Committee agreed to consider proposals to deal with specific problems not otherwise covered.

Special lecture (Item 8 of the Agenda)

58. The special lecture was devoted to investment in the forestry and wood-processing sector. A panel of two speakers presented lectures: Mr. Pekka Alonen, Vice-President of the Jaako Pöyry Co. (Finland), presented a lecture prepared by himself and Mr. Risto Eklund, Senior Vice-President of the same organization on "Investments in forestry and the forest industries in Europe". Mr. Virgilio Teixeira Lopo, Chairman of the Board of Management of PORTUCEL (Portugal) spoke on "Investment problems in the forestry and wood-processing sector from the industry point of view".

59. These presentations were followed by a discussion, which touched among other things on the following points:

- the present low rate of return on investment in the forestry industries makes it difficult to attract investment;
- planning of investment in forest industry should be co-ordinated with investment in forestry;
- investment planning is complicated by the cyclical market fluctuations.

60. The Committee expressed its warm appreciation of the excellent presentations of the two speakers and requested the secretariat to publish their lectures in a supplement to the Timber Bulletin for Europe.

Activities of other principal subsidiary bodies of ECE of interest to the Timber Committee (Item 9 of the Agenda)

61. The Committee was informed, on the basis of document TIM/R.35, of the activities of other principal subsidiary bodies of ECE dealing with problems of concern to it. The Committee took note of the document and agreed to take the information presented into account when discussing its own programme of work.

Programme of work for 1978-1982 (Item 10 of the Agenda)

62. The Committee considered its programme of work on the basis of a draft programme prepared by the secretariat (TIM/R.36), which took into account the programme approved by the Committee at its thirty-fourth session, the resolution, decisions and discussion of the Commission's thirty-second session and the results of meetings of the Committee's subsidiary bodies. The Committee also took into account its own discussions under other items of the agenda.

63. Some delegations considered that it was necessary to intensify in the Timber Committee programme of work for 1978-1982 the examination of problems linked with the environment; conservation of resources, transport and handling of forest products and energy use in the forest industries. These problems were of interest to all and their importance necessitated examination at a higher level than the Timber Committee. The Committee in its turn could intensify its work in these areas by examining these problems more closely in its subsidiary bodies, and by improving the exchange of information.

64. The Committee considered the organization of its annual sessions on the basis of proposals put forward by the Vice-Chairman, Mr. A. Froncillo (TIM/R.36/Add.1). With regard to future sessions, it agreed on the following:

- (1) its sessions should continue to cover a 4½-day period, beginning on Monday afternoon;
- (2) the system, put into effect on an experimental basis at the present session, of having four discussion panels composed of experts nominated by countries for each of the four sectors covered under the item "market review and prospects", had proved successful and should be retained. The office-holders should consider possible improvements to the arrangements;
- (3) In view of the increasing importance of ECE countries' trade in forest products with other regions, the Committee agreed to invite observers from major trading countries outside the ECE region, including Japan, and from the following organizations: the Tropical Timber Traders' Union of the European Economic Community (UCBT); the South East Asian Lumber Producers Association (SEALPA); and the African Timber Organization (OAB).

65. The Committee warmly thanked Mr. Froncillo for his initiative in making proposals for further increasing the value of its sessions.

66. The Committee noted that as yet little had been done at the international level to establish accurate correlations between short-term developments in economic indicators and their effects on the markets for forest products, enabling a better understanding of the factors controlling developments in the sector. It was suggested that delegates determine whether any such work had been undertaken in their countries and consider whether the knowledge gained could be of use to the Committee.

67. The Committee stressed the importance of the continuing close co-operation with FAO, notably the FAO European Forestry Commission. It was also suggested that experts from other appropriate FAO bodies be invited to contribute to the Committee's discussion of trends in the market for forest products. For instance, an expert from the FAO Advisory Committee on Pulp and Paper could be invited as a member of the panel in the Committee's discussion of the market for pulpwood and coniferous logs.

68. The Committee decided that, while preparatory meetings would be necessary for some seminars and symposia, for others it might not be necessary to hold a formal preparatory meeting. On occasion it would be sufficient that a provisional agenda be drawn up for presentation to the Committee, after consultation between the authorities of the host country, experts from other countries which had expressed an interest in the subject and the secretariat. The Committee decided that preparatory meetings would be necessary for the symposium on the effects of pollution on vegetation (project 14.4.3) (see para. 70) and on economic and technical developments in the furniture industry (project 14.3.5), but that the seminar on the utilization of tropical hardwoods (project 14.3.3) would best be prepared by informal consultations. It therefore requested interested countries to nominate an expert to participate in the preparation of the latter symposium. Such nominations should be received by 31 December 1977.

69. The Committee was informed that because of difficulties in processing the large volume of United Nations documentation, it was no longer possible for the secretariat to collect and publish the proceedings of seminars and symposia held under the Committee's auspices. The Committee regretted this situation, and stressed the value of such proceedings for the dissemination and exchange of knowledge. It strongly urged those countries which acted as host to seminars and symposia also to undertake the publication of their proceedings, thus making available to a wider audience than the participants the knowledge and experience collected.
70. The Committee was informed that a preparatory meeting would be held on 21 and 22 November 1977 for the symposium on the effects of pollution on vegetation, to be held in 1979 jointly with the Committee on Agricultural Problems and in co-operation with Senior Advisers to ECE Governments on Environmental Problems and the United Nations Environment Programme (UNEP). A provisional agenda had been issued for the preparatory meeting (TIM/WP.3/AG.5/1). The Committee noted that in order to reach a decision at the preparatory meeting on where the symposium should be held, it was necessary that UNEP confirm by that time its commitment to support financially the organization of the symposium in Poland, which had been made at the session of the Senior Advisers to ECE Governments on Environmental Problems in February 1977.
71. The Committee was informed that the FAO European Forestry Commission at its eighteenth session in September 1977 had proposed that a meeting be held under the joint auspices of the Committee and the Commission to examine the forest policy and environmental problems facing member nations in the Mediterranean area, in the light of the long-term outlook for their forest economies as depicted in European Timber Trends and Prospects, 1950-2000. The Committee accepted this proposal and suggested that the meeting should examine the problems of the Southern European countries needing attention and draw up proposals for action.
72. The Committee expressed its appreciation to Mr. V.P. Nemtsov (USSR), Vice-Chairman of the Committee, for the development of a glossary of forestry and woodworking terms (TIM/CRP.28). However, the Committee considered that the subject matter of the glossary put it in the area of competence of the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers, and asked the Joint Committee to decide, at its twelfth session in 1978, whether further work was needed and if so what direction this work should take.
73. As a further step towards improving understanding between experts, the Committee suggested that seminars and symposia held in the framework of the Committee's programme should discuss terminology questions within their field of interest and that small, specialized multilingual glossaries, covering the major terms in the field discussed by the seminar or symposium should be prepared for use at such meetings. Such work could also be of use to other experts discussing the subject at the international level.
74. The Committee gratefully accepted the following invitations by countries to host symposia or seminars: the Netherlands will host the seminar on the utilization of tropical hardwoods in 1979; Finland confirmed its intention to host the symposium on modernization of the wood-based panels industries in 1980; and the USSR stated that it agreed, in principle, to host the symposium on the reduction of waste and development of the use of residues in forestry, the wood-processing industries and in forest products utilization in 1981. The Committee also accepted the offer of the USSR to organize a study tour in 1979 and requested the delegation of the USSR to make the necessary practical arrangements with the secretariat.

75. On the basis of these discussions the Committee approved its programme of work as set out in annexes II and III.

Other business (Item 11 of the Agenda)

76. The Committee was informed that, as agreed by the office-holders, a brochure describing its activities had been prepared, entitled "Facts about ... the ECE Timber Committee". The Committee considered that this brochure, intended for experts in the forest and forest products sectors, would help to make the Committee's activities more widely known and therefore be of great benefit to the forest products sector in member countries. It urged delegations to give the contents of the brochure wide diffusion within their own countries, and to consider the possibility of translating it into their own languages.

Adoption of the report of the Committee's session (Item 12 of the Agenda)

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

Date of next session

78. The Committee agreed that its next session should be held from 9 to 13 October 1978, subject to the availability of conference services for that period.

Films

79. The delegation of Canada showed a film entitled "In which we dwell". The delegation of the USSR showed two films entitled "Integrated wood complex in the Carpathians" and "International logging competition 1975". The Committee thanked these two delegations for these most interesting films.



Annex II

TIMBER COMMITTEE PROGRAMME OF WORK FOR 1978-1982

Estimated duration (in years)	Estimated termination (year)
-------------------------------------	------------------------------------

WORK AREA 14.1 : MEDIUM AND LONG-TERM TRENDS  
AND PERSPECTIVES

14.1.1. Review of projections made in study "European  
Timber Trends and Prospects, 1950 to 2000" in relation  
to actual developments

Description: The Committee will keep under review long-term trends in production, trade, consumption and prices of forest products, comparing them with projections made in the long-term study, both to check the accuracy of the analyses presented in the study and in order to provide early warning of changes in trends, thus enabling Governments to review their long-term forest policies in the light of recent developments.

Method of work: The Committee will compare, on a continuing basis, real trends with the projections of the long-term study, as an integral part of its analyses of specific aspects of the forest products sector (notably under projects 14.1.2., 14.1.3., 14.1.4., 14.2.1). In addition, the secretariat will prepare an overall study which will compare real trends up to 1980 with projections. cont.

14.1.2. Trends in the utilization of forest products in  
specific end-use sectors

Description: The Committee will review periodically the utilization of forest products in specific end-use sectors (e.g. construction, furniture, packaging, railway sleepers, mining timber) as part of the continuing analysis of trends in forest products markets intended to provide Governments with data necessary for the elaboration of their forest products policy in the light of prevailing demand conditions.

Method of work: The secretariat will prepare studies based on questionnaire returns. The Committee will determine the timing of studies and the choice of subjects on the basis of the results of project 14.5.2.7. cont.

Estimated duration (in years)	Estimated termination (year)
-------------------------------------	------------------------------------

14.1.3. Medium-term trends in the structure and capacity of the wood-processing industries

14.1.3.1. The wood-based panels industries

Description: The Committee will review the structure and capacity of the wood-based panels industries in order to enable Governments to form their own industrial policies for the wood-based panels sector in the light of information on international conditions.

Method of work: The Committee will decide at its 1979 session on the scope and orientation of its activities in this field before embarking on the next survey scheduled for 1980.

cont.

14.1.3.2. The sawmilling industry

Description: The Committee will review the structure and capacity of the sawmilling industry in order to enable Governments to form their policies for the sawmilling industry in the light of information on international conditions.

Method of work: The secretariat will prepare a study, based on questionnaire returns, in conjunction with the medium-term survey of markets for sawnwood and sawlogs scheduled for 1978. The Committee will determine, on the basis of the results of the study, whether such studies should in future be undertaken on a regular basis.

2

1978

14.1.4. Medium-term trends in the markets for specific forest products

Description: The Committee will review medium-term (3-5 years) trends in the production, consumption, trade and prices of major forest products so that Governments may be continuously informed of structural trends in the forest products markets of the ECE region.

Method of work: The secretariat will prepare one study annually, on a three-year rotation of subjects, as follows: Sawnwood and sawlogs: 1978, 1981, etc., Pulpwood (including residues and chips), pitprops and miscellaneous roundwood: 1979, 1982, etc., Wood-based panels: 1980, 1983, etc. The secretariat will prepare as part of the 1979 study on pulpwood, etc., and at intervals thereafter as will be decided, a review of trends in roundwood production and supply. The 1980 study on wood-based panels will pay special attention to the production and utilization of improved wood-based panels, with special reference to their surface covering.

cont.

Estimated duration (in years)	Estimated termination (year)
-------------------------------------	------------------------------------

14.1.5. Relative long-term price trends of forest products and alternative materials

Description: The Committee will review long-term price developments in different countries, both of specific forest products and of alternative materials, in order to keep under review the competitive position of forest products, to provide Governments with guidance for the formation of their policies for investment in forestry and the forest industries and to examine the validity of the assumptions on prices of the study of timber trends and prospects in Europe, 1950-2000.

Method of work: Studies prepared by country experts on long-term price trends will be updated and published. The series of prices collected by means of an enquiry will be updated and published.

1

1978

14.1.6. Trends, prospects and policies in southern Europe

Description: The forest and forest industry policy and environmental problems facing countries in the Mediterranean area will be reviewed in the light of the long-term outlook for their forest economies, as depicted in "European Timber Trends and Prospects, 1950 to 2000".

Method of work: An ad hoc meeting of experts will be convened in 1979, jointly with the FAO European Forestry Commission, to study the problems involved and to draw up recommendations for future action.

2

1979

WORK AREA 14.2 : CURRENT MARKET DEVELOPMENT AND SHORT-TERM PROSPECTS, INCLUDING PROBLEMS RELATING TO INTERNATIONAL TRADE

14.2.1. Review of production, trade, consumption and prices of forest products

Description: The Committee will analyse on a continuous basis, short-term trends in the production, trade and prices of forest products and forecast short-term prospects, with a view to providing Governments and the forest products sector with accurate and up-to-date information and assessments, necessary for an orderly development of the supply-demand mechanism.

Estimated duration (in years)	Estimated termination (year)
-------------------------------------	------------------------------------

Method of work: The secretariat will prepare and publish annually a review of trends in forest products markets over the previous year, based on data supplied by Governments in connexion with project 14.5.1. The secretariat will present to the Committee's annual session the most recent available data on trends in the market for forest products, obtained from questionnaire returns, with a brief analysis of the situation. The Committee will review, at its annual session, short-term trends and prospects in the production, trade and prices of major forest products (sawn softwood, hardwoods, including tropical, pulpwood, coniferous logs and wood-based panels) on the basis of estimates prepared by delegations, for the current and following years. After the session the secretariat will prepare and publish an analysis of short-term market trends and prospects, based on the Committee's discussions.

cont.

14.2.2. Selected problems in rationalizing the transport and handling of forest products

Description: The Committee will review the situation as regards transport and handling of forest products and recommend any action it considers necessary with a view to increasing the efficiency of these activities and thus facilitating international trade.

Method of work: The Committee will base its annual review on a report and, if necessary, recommendations by its coordinator for transport and handling. A special lecture on recent developments in the transport and handling of forest products will be delivered at the Committee's thirty-seventh session in 1979.

cont.

14.2.3. Review of standardization activities

Description: The Committee will review at its annual session needs and priorities for standardization in the field of forest products as well as progress in its own standardization projects (14.2.4., 14.2.5., 14.2.6.). On the basis of this review, it will decide what activities it should undertake, with a view to facilitating international trade in forest products by removing non-tariff barriers, and to furthering the rational and economic use of wood.

Estimated duration (in years)	Estimated termination (year)
-------------------------------	------------------------------

Method of work: The Committee will base its annual review on a report, and if necessary, recommendations by its co-ordinator in the field of standardization.

cont.

14.2.4. Standardization of stress grading of coniferous sawn timber

Description: The Committee will encourage the application of the ECE recommended standard on stress grading of coniferous sawn timber, notably by incorporation of its provisions into national standards, and undertake any further work necessary for the refinement of the recommended standard, with a view to ensuring the rational and economic use of and to facilitating trade in coniferous sawn timber.

Method of work: The Committee will convene an informal team of experts to collect information and make proposals for research programmes, quality control programmes and marking systems for stress graded coniferous sawnwood. The informal team will, among other things, draft a set of guidelines for countries developing quality control programmes. The Committee will organize training courses to exchange experience on the application of the recommended standard and for the training of those responsible for sawnwood grading. An ad hoc meeting will be convened after 1980 to review and, if necessary, update the recommended standard.

4

1982

14.2.5. Standardization of finger-jointing in structural coniferous sawn timber

Description: The Committee will encourage the application of the ECE recommended standard on finger-jointing in structural coniferous sawn timber, notably by incorporation of its provisions into national standards, and undertake any further work necessary for the refinement of the recommended standard, with a view to ensuring the rational and economic use of and to facilitating trade in structural finger-jointed coniferous sawn timber.

Method of work: The Committee will convene an informal team of experts to collect information and make proposals about research programmes, quality control programmes and marking systems for finger-joints in structural coniferous sawnwood. The Committee will also organize seminars to exchange experience on the application of the recommended standard. An ad hoc meeting will be convened after 1980 to review and, if necessary, update the recommended standard.

4

1982

Estimated duration (in years)	Estimated termination (year)
-------------------------------------	------------------------------------

14.2.6. Reduction of the number of standard dimensions of sawnwood entering international trade

Description: The Committee will formulate proposals for the reduction of the number of standard dimensions of sawnwood entering international trade, on the basis of ISO International Standard 3179 and in collaboration with ISO, with a view to facilitating international trade in sawnwood.

Method of work: The secretariat, in co-operation with the Committee's co-ordinator on standardization affairs and with ISO, will carry out an enquiry on which dimensions are in common use in international trade. On the basis of the results of this enquiry, the Committee will decide at its thirty-sixth session in 1978, what further action should be undertaken, including the possibility of achieving closer harmonization between North American and European dimensions.

3

1981

14.2.7. Classification and definitions of forest products

14.2.7.1. Revision of FAO Classification and Definitions of Forest Products

Description: The Joint FAO/ECE Working Party on Forest Economics and Statistics, in co-operation with the Conference of European Statisticians, will revise the FAO Classification and Definitions of Forest Products, with a view to ensuring that it is in harmony with international multi-sector classifications and definitions.

Method of work: An ad hoc meeting, under the auspices of the Joint Working Party, will revise the FAO Classification and Definitions of Forest Products (advance version already published) when the revision of the major international classifications (e.g. SITC, BTN, ICGS) at present in progress, is complete.

2

1979

Estimated duration (in years)	Estimated termination (year)
-------------------------------------	------------------------------------

14.2.7.2. Classification and definitions of wood residues

Description: The Committee will harmonize national classifications and definitions of wood residues and of wood after its first use, with a view to facilitating international comparisons as well as analyses of the wood supply situation at the regional level.

Method of work: The Joint FAO/ECE Working Party on Forest Economics and Statistics will draw up a classification and definitions of wood residues at its twelfth session, on the basis of proposals prepared by the secretariat.

2	1980
---	------

14.2.8. Rationalization of the flow of forest products from the forest to the consumer

Description: The Committee will review the international distribution chain for forest products, from the forest to the consumer, with a view to identifying any areas where the Committee might undertake specific action.

Method of work: A special lecture will be delivered to the thirty-sixth session of the Committee, scheduled for 1978, analysing the distribution chain. In the light of this lecture, the Committee will decide on a future course of action.

2	1979
---	------

WORK AREA 14.3 : SELECTED ECONOMIC, TECHNOLOGICAL AND MANAGERIAL PROBLEMS

14.3.1. Forest working techniques and training of forest workers

(This project is covered by the activities of the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers. The project components set out below reflect the structure of the Joint Committee's programme, as approved at its tenth session. It will be necessary to revise them, in the light of the recommendations of the twelfth session, when the process of restructuring of the Joint Committee's programme and methods of work is completed.)

Estimated duration (in years)	Estimated termination (year)
-------------------------------------	------------------------------------

14.3.1.1. Methods and organization of forest work

Description: The Joint Committee will study selected problems of methods and organization of forest work, with a view to using resources of labour and capital in the most efficient way and minimizing costs of forest work.

Method of work: The Study Group on Methods and Organization of Forest Work will meet biennially (1979, 1981, etc.) to recommend to the Joint Committee problems on which work is needed and to carry out specific projects.

cont.

14.3.1.2. Vocational training and prevention of accidents

Description: The Joint Committee will study selected problems of vocational training and prevention of accidents in forest work, with a view to improving national policies and regulations by the exchange and dissemination of information in this field.

Method of work: The Study Group on Vocational Training and Prevention of Accidents in Forest Work will meet biennially (1979, 1981, etc.) to recommend to the Joint Committee problems on which work is needed and to carry out specific projects.

cont.

14.3.1.3. Mechanization of forest work

Description: The Joint Committee will study selected problems of mechanization of forest work with a view to enabling Governments to adapt their policies to changing economic and environmental constraints by the exchange and dissemination of information in this field.

Method of work: The Study Group on Mechanization of Forest Work will meet biennially (1978, 1980, 1982, etc.) to recommend to the Joint Committee problems on which work is needed and to carry out specific projects.

cont.

Estimated duration (in years)	Estimated termination (year)
-------------------------------------	------------------------------------

14.3.1.4. Dissemination and exchange of information

Description: The Joint Committee will further the dissemination and exchange of information in selected areas related to the economic, social, technical and environmental aspects of its work in order to provide guidance to Governments in the field of forest working techniques and the training of forest workers.

Method of work: The Joint Committee will draw up a programme of seminars, symposia and training courses at its biennial sessions (1978, 1980, 1982, etc.). A symposium will normally be held in conjunction with the Joint Committee session.

cont.

14.3.2. Wood preservation

Description: The Committee will review technical and economic developments in wood preservation with a view to encouraging the rational and economic use of wood.

Method of work: A special lecture will be delivered at the thirty-sixth session of the Committee in 1978.

1 1978

14.3.3. Utilization of tropical hardwoods

Description: The Committee will review the utilization of tropical hardwoods with a view to analysing patterns and trends in the demand for these products and to identifying opportunities for expanding trade with developing countries.

Method of work: A seminar will be held in 1979, in the Netherlands.

2 1979

14.3.4. Effects of taxation on forest management and wood supply

Description: The Committee will review the effects of national taxation systems on forest management and wood supply with a view to assessing how these systems affect the supply/demand balance for forest products in the ECE region and the structure of international trade.

Estimated duration (in years)	Estimated termination (year)
-------------------------------	------------------------------

Method of work: The Joint FAO/ECE Working Party on Forest Economics and Statistics will undertake an enquiry on taxation, taking as a basis work being carried out by the European Economic Community for its member countries.

2

1979

14.3.5. Economic and technical developments in the furniture industry

Description: The Committee will further the exchange of information on economic and technical developments in the furniture industry, with a view to assessing in quantitative and qualitative terms the use of forest products in that industry and the trends and prospects in the demand for forest products for that sector.

Method of work: A symposium will be held in Poland in 1979. A preparatory meeting, organized with the help of Government rapporteurs, will be held in 1978.

2

1979

14.3.6. Modernization in the wood-based panels industries

Description: The Committee will further the exchange and dissemination of scientific, technological and economic information on modernization in the wood-based panels industries.

Method of work: A symposium will be held in 1980, in collaboration with the Chemical Industries Committee, in Finland.

1

1980

14.3.7. Review of progress made in the chemical processing of wood (other than for pulp and paper) and the potential of the use of wood for chemical products

Description: In conjunction with the Chemical Industries Committee, the Committee will keep under review, from the technical and economic point of view, progress made in the chemical processing of wood (other than for pulp and paper) with a view to improving the utilization of by-products of the wood processing industries, and to assessing potential demand from the chemical industry for wood raw material, as well as the effect any increase would have on the supply/demand balance for forest products in the ECE region and the availability of raw material for traditional wood-using industries.

Estimated duration (in years)	Estimated termination (year)
-------------------------------	------------------------------

Method of work: The secretariat will prepare a report on what studies have been undertaken on the subject at the international level and present this report to the Committee's thirty-sixth session in 1978. The Committee will then decide on a course of action.

3

1980

WORK AREA 14.4 : ENVIRONMENTAL AND RESOURCE CONSERVATION PROBLEMS

(All the Committee's activities in this work area will be carried out in co-operation with the Senior Advisers to ECE Governments on Environmental Problems).

14.4.1. Quantification and evaluation of the environmental benefits of forests

Description: The Joint FAO/ECE Working Party on Forest Economics and Statistics will examine methods of quantifying and evaluating the environmental benefits of forests with a view to assessing forests' contribution to society, to calculating compensation for the environmental services of forests and to facilitating comparisons between countries.

Method of work: Further work on the quantification of the environmental role of forests will be linked with project 14.5.2.4. An enquiry will be prepared by a meeting of experts.

2

1979

14.4.2. Reduction of waste and development of use of residues in forestry, the wood-processing industries and in forest products utilization

Description: The Committee will assess ways of reducing waste and developing the use of residues in forestry, the wood-processing industries and in forest products utilization in order to further the rational use of the forest resource.

Method of work: A symposium will be held in 1981, perhaps in the USSR.

1

1981

Estimated duration (in years)	Estimated termination (year)
----------------------------------	---------------------------------

14.4.3. Effects of pollution on vegetation

Description: The Committee will assess the effects of different types of pollution on vegetation with a view to improving the protection of the forest resource of the ECE region against such damage.

Method of work: A symposium will be held in 1979, perhaps in Poland, jointly with the Committee on Agricultural Problems and in co-operation with the Senior Advisers to ECE Governments on Environmental Problems and UNEP. A preparatory meeting will be held in 1977, subject to approval by the other bodies involved.

2

1979

14.4.4. Energy aspects of the forest industries

Description: The Committee will study energy use in forestry, the wood-processing industries and the use of forest products, with a view to identifying means to improve energy efficiency.

Method of work: A symposium will be held in 1978, in Italy.

1

1978

WORK AREA 5 : COLLECTION, EXCHANGE AND DISSEMINATION OF INFORMATION, INCLUDING IMPROVEMENT AND HARMONIZATION OF STATISTICS (IN CO-OPERATION WITH FAO)

14.5.1. Timber Bulletin for Europe

Description: The Committee will collect statistics on production, trade and prices of forest products, with a view to providing Governments and the forest products sector with data on the basis of which to formulate policies and make decisions.

Method of work: The secretariat will publish, twice a year, the Timber Bulletin for Europe, containing quarterly statistics on production, trade and prices of forest products, collected from Governments by means of quarterly questionnaires.

cont.

Estimated duration (in years)	Estimated termination (year)
-------------------------------------	------------------------------------

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

This project is covered by the activities of the Joint FAO/ECE Working Party on Forest Economics and Statistics which normally meets biennially (1979, 1981, etc.). It co-operates with the Conference of European Statisticians.

14.5.2.1. Comparability of statistics

Description: The Working Party will improve international comparability in selected areas of statistics in order to ensure that the data used by Governments for international comparisons and by the Committee in its analyses are as accurate and comparable as possible.

Method of work: The Working Party will collect information in each area by means of questionnaires and studies and formulate recommendations to Governments, which will be submitted to the Committee for approval. The Working Party will propose series for which such action is necessary.

cont.

14.5.2.2. Organization and periodicity of statistical  
data collection and dissemination

Description: The Working Party will review periodically the Committee's programme of collection and dissemination of statistical data, to ensure that it corresponds with the needs of Governments.

Method of work: The Working Party will review periodically the Committee's programme of collection and dissemination of statistical data and make recommendations to improve its organization, coverage and periodicity.

cont.

14.5.2.3. Conversion factors

Description: The Working Party will review the conversion factors for forest products applicable to individual countries, in order to facilitate international comparison of yields and to ensure that the conversion factors used by the secretariat in its analyses reflect current technology.

Estimated duration (in years)	Estimated termination (year)
-------------------------------------	------------------------------------

Method of work: The Working Party will review at four-yearly intervals (1981, 1985, etc.) conversion factors communicated by Governments in reply to a questionnaire. The results of the 1977 enquiry will be revised, complemented with additional information and published.

cont.

#### 14.5.2.4. Forest resource analysis

Description: The Working Party will review methods of forest inventory used by Governments and by the secretariat to ensure that all parameters relevant to measuring the actual productive potential of the forest, as well as parameters measuring change, both for wood and non-wood benefits, are taken into account and that the methods adopted correspond as closely as possible to the needs of all the users.

Method of work: An ad hoc meeting will be held in 1979.

2

1979

#### 14.5.2.5. Cost and price statistics

Description: The Working Party will improve the coverage of the statistics on costs and prices published in the Timber Bulletin for Europe.

Method of work: Series of cost and price statistics will be published in the light of the recommendations of correspondents nominated by Governments.

1

1978

#### 14.5.2.6. Labour statistics

Description: The Working Party, in co-operation with the Joint FAO/ECE/ILO Committee on Forest Working Techniques and Training of Forest Workers, will study labour input, average wage rates and earnings in forestry, with a view to providing more data on cost trends and a basis for comparison of employment and earnings.

Method of work: The pilot enquiry undertaken by the informal team of experts will be revised and extended to cover all ECE countries.

2

1979

Estimated duration (in years)	Estimated termination (year)
-------------------------------------	------------------------------------

14.5.2.7. End-use statistics

Description: The Working Party will review the coverage and availability of statistics on the end-uses of forest products with a view to improving the data base for the Committee's work in this area (see 14.1.2.).

Method of work: The secretariat will circulate an enquiry on the broad pattern of end-use of sawnwood and wood-based panels. The Working Party will review at its twelfth session the results of this survey and propose possible further activities in this field.

2	1979
---	------

14.5.2.8. Forest fire statistics

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

Method of work: The Working Party will decide on a method of work at its twelfth session, scheduled for 1979.

2	1981
---	------

14.5.3. Dissemination and exchange of general information and experience

Description: The Committee will further the dissemination and exchange of information and experience on selected themes within its area of competence, by dissemination of statistical and other information on countries' forestry and forest products sector, and by organizing annual study tours at the invitation of the countries concerned with a view to making available to Governments and the forest products sector experience gained in individual countries.

Method of work: In 1978, a study tour will be organized in Poland; in 1979 in the USSR. Country forestry and forest products profiles will be prepared by the secretariat, in collaboration with the Governments of the countries concerned, and published at five to six year intervals.

cont.

ANNEX III

Tabular presentation of Timber Committee programme of work 1978-1982

Project number	Project	1978	1979	1980	1981	1982
14.1.1.	<u>WORK AREA 14.1: MEDIUM AND LONG-TERM TRENDS AND PERSPECTIVES</u> Review of projections made in study Timber Trends and Prospects in Europe, 1950-2000 in relation to actual developments	Continuous (cf. projects 14.1.2, 14.1.3, 14.1.4, 14.2.1)			Study of trends to 1980	
14.1.2.	Trends in the utilization of forest products in specific end-use sectors	Continuous (sectors to be determined)				
14.1.3.	Medium-term trends in the structure and capacity of wood-processing industries	Sawmilling industry		Wood-based panels industries (as determined by Committee)		
14.1.4.	Medium-term trends in the market for specific forest products	Sawwood and sawlogs	Pulpwood, pitprops and miscellaneous roundwood, and review of trends in roundwood production and supply	Wood-based panels (including study of production and utilization of improved wood-based panels)	Sawwood and sawlogs	Pulpwood, pitprops and miscellaneous roundwood
14.1.5.	Relative long-term price trends of forest products and alternative materials	Publication of price series				
14.1.6.	Trends, prospects and policies in southern Europe		Ad hoc meeting			
14.2.1.	<u>WORK AREA 14.2: CURRENT MARKET DEVELOPMENTS AND SHORT-TERM PROSPECTS, INCLUDING PROBLEMS RELATING TO INTERNATIONAL TRADE</u> Review of production, trade, consumption and prices of forest products	Continuous				
14.2.2.	Selected problems in rationalizing the transport and handling of forest products	Continuous, at annual session	Special lecture			
14.2.3.	Review of standardization activities	Continuous, at annual session			Review meeting	
14.2.4.	Standardization of stress grading of coniferous sawn timber	Informal team of experts on research, quality control and marking			Review meeting	
14.2.5.	Standardization of finger-jointing in structural coniferous sawn timber	Informal team of experts on research, quality control and marking				
14.2.6.	Reduction of the number of standard dimensions of sawwood entering international trade	Enquiry, then as decided by Committee at thirty-sixth session				
14.2.7.	Classification and definitions of forest products					
14.2.7.1.	- Revision of FAO Classification and Definitions of Forest Products		Ad hoc meeting (timing to be determined)			
14.2.7.2.	- Classification and definitions of wood residues		Classification and definitions to be drawn up by Joint FAO/ECE Working Party on Forest Economics and Statistics at its twelfth session			
14.2.8.	Rationalization of the flow of forest products from the forest to the consumer	Special lecture (Method of work to be defined by the thirty sixth session)				
14.3.1.	<u>WORK AREA 14.3: SELECTED ECONOMIC, TECHNOLOGICAL AND MANAGERIAL PROBLEMS</u> Forest working techniques and the training of forest workers (Activities of the Joint FAO/ECE/ILO Committee)	Twelfth session of the Joint Committee held in Bulgaria		Thirteenth session of Joint Committee held in .....		Fourteenth session of Joint Committee held in .....
14.3.1.1.	- Methods and organization of forest work		Tenth session of Study Group		Eleventh session of Study Group	

1/ Offers to act as host country are invited.

## ANNEX III

## Tabular presentation of Timber Committee programme of work 1978-1982

Project number	Project	1978	1979	1980	1981	1982
14.3.1.2.	- Vocational training and prevention of accidents in forest work	Symposium on the prevention of accidents in forest work, held in Poland	Twelfth session of Study Group	Ninth session of Study Group	Thirteenth session of Study Group	
14.3.1.3.	- Mechanization of forest work	Eighth session of Study Group				
14.3.1.4.	- Dissemination and exchange of information	Continuous, as determined by eleventh session of Joint Committee				
14.3.2	Wood preservation	Special lecture	Seminar in the Netherlands			
14.3.3.	Utilization of tropical hardwoods	Enquiry by the Joint FAO/ECE Working Party on Forest Economics and Statistics				
14.3.4.	Effects of taxation on forest management and wood supply	Preparatory meeting	Symposium in Poland	Symposium in Finland		
14.3.5.	Economic and technical developments in the furniture industry	Reconnaissance report.	As decided at Committee's thirty-sixth session			
14.3.6.	Modernization in the wood-based panels industries					
14.3.7.	Review of progress made in the chemical processing of wood (other than for pulp and paper) and the potential of the use of wood for chemical products					
14.4.1.	Quantification and evaluation of the environmental benefits of forests		(Work to be linked with project 14.5.2.4.)		Symposium in USSR (tentative offer)	
14.4.2.	Reduction of waste and development of use of residues in forestry, the wood-processing industries and in forest products utilization					
14.4.3.	Effects of pollution on vegetation					
14.4.4.	Energy aspects of the forest industries	Symposium in Italy	Symposium in Poland (subject to confirmation)			
14.5.1.	Timber Bulletin for Europe	Continuous (twice yearly publication)				
14.5.2.	Selected problems of economics and statistics of forestry and forest products (Activities of the Joint FAO/ECE Working Party on Forest Economics and Statistics)		Twelfth session of Joint Working Party		Thirteenth session of Joint Working Party	
14.5.2.1.	- Comparability of statistics	Continuous. Method of work to be determined by Working Party				
14.5.2.2.	- Organization and periodicity of statistical data collection and dissemination	Continuous. Review at regular sessions of Joint Working Party				
14.5.2.3.	- Conversion factors		Ad hoc meeting			
14.5.2.4.	- Forest resource analysis					
14.5.2.5.	- Cost and price statistics	Publication of series		Study		
14.5.2.6.	- Labour statistics	Enquiry				
14.5.2.7.	- End-use statistics	Enquiry				
14.5.2.8.	- Forest fire statistics					
14.5.3.	Dissemination and exchange of general information and experience	Study tour in Poland	Study tour in USSR	Study tour in .....1/	Study tour in .....1/	Study tour in .....1/

1/ Offers to act as host country are invited.