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Provisional agenda, Item 3(g)

Background paper

MEASURES FOR INCREASING THE EXPORTS AND EXPORT POTENTIAL
OF FOREST PRODUCTS FROM DEVELOPING COUNTRIES

Presented by the secretariat of the United Nations
Conference on Trade and Development

GE.67-1969

We regret that some of the pages in the microfiche copy of this report may not be up to the proper legibility standards, even though the best possible copy was used for preparing the master fiche.

NOTE

Within its programme of work, the UNCTAD Committee on Manufactures is considering sectors of industry with a current or potential export interest to developing countries. In this context, an ad hoc joint UNCTAD/PAC working party was set up in 1966 to deal with forest and timber products and, in particular, to determine ways and means of:

- (a) Building up the export potential of developing countries of processed forest products; and
- (b) Increasing exports of these products to developed countries.

The Working Party adopted a number of recommendations in this field.

Its report (document TL/M/C.2/18 - TL/M/C.2/MC.2/17), which has been submitted to the UNCTAD Committee on Manufactures, is attached herewith.



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United Nations Conference on Trade and Development

TRADE AND DEVELOPMENT BOARD
Committee on Manufactures
Second session
Geneva, 31 January 1967

REPORT BY THE AD HOC JOINT UNCTAD/FAO WORKING PARTY ON FOREST AND TIMBER PRODUCTS TO THE COMMITTEE ON MANUFACTURES

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Introduction

1. At its resumed first session (Geneva, 28 February to 9 March 1966), the Committee on Manufactures decided, subject to the approval of the Trade and Development Board, to set up an ad hoc inter-sessional Working Party, consisting of experts appointed by interested member countries, to deal with forest and timber products^{1/}. At its fourth session (Geneva, 30 August to 24 September 1966), the Board approved the establishment of the Working Party as an ad hoc joint UNCTAD/FAO body^{2/}.
2. Under its mandate, the Working Party is to report as soon as possible to the Committee on its findings on ways and means for expanding the export of timber and forest products of developing countries, particularly to developed countries. The detailed terms of reference of the Working Party are reproduced in Annex I to this report^{3/}.
3. In pursuance of a decision by the Trade and Development Board^{4/}, the meeting of the ad hoc joint UNCTAD/FAO Working Party on Forest and Timber Products was held in Geneva between 31 October and 5 November 1966.

^{1/} TD/B/69 - TD/B/C.2/14 paragraph 17.

^{2/} A/6315, Part Two, paragraph 133.

^{3/} In view of the immediate prospects for expansion of exports, emphasis was placed during the meeting on sawwood, plywood and veneers of tropical species.

^{4/} A/6315, Part Two, Annex A, decision 33 (IV).

Chapter I

REVIEW OF THE DEVELOPING COUNTRIES' EXPORTS OF PROCESSED FOREST PRODUCTS

4. The Working Party took note of a secretariat paper reviewing the magnitude, pattern and recent trends in developing countries' exports of processed forest products to developed countries. The great bulk of forest product exports from these countries is in the form of unprocessed logs. It was noted that developing countries' exports of processed forest products to developed countries were very largely confined to the sawwood, plywood or veneer of a limited number of tropical hardwood types of superior decorative, machining or in-use properties. The development of the trade has been strongly influenced by the location of large concentrated resources of these woods readily accessible to the major markets. It has also been affected by the stage of development of the infrastructure and of the industrial services and skills in the primary producing countries, and by the trading investment and other links and barriers which existed between producing and importing countries.
5. The Working Party stressed the immediate need of developing countries for detailed information on specifications of processed wood products required in importing countries. At the same time, importers required more information on the species of timber and their properties which the producing countries can supply in commercial volume.
6. It was recognised that much of such information exists; what was lacking were adequate channels for its rapid dissemination.

ANNEX III

CONSIDERATION OF THE NEED FOR MARKET INFORMATION

A. Growth of demand for tropical wood products in industrial countries

7. The Working Party considered trends in demand for tropical forest products exported from developing countries. It has admitted that trends in the United States of America, Europe and Japan, and statements from a number of countries with planned economies indicated that demand in these regions for tropical hardwood in the form of sawn wood, plywood and veneer was expected to continue to expand in the foreseeable future and that these products provided some of the best prospects for growth in exports from developing countries.

8. The Working Party considered the need for market information, the benefits of market development and trade promotion, the need for research and dissemination of information on the properties of tropical timbers, especially those of the lesser-known species, as well as the ways in which these services could be provided.

9. Regarding market information, the Working Party stressed that a major obstacle to increasing the flow of processed forest products from developing countries was the lack of effective contacts between producers and consumers. Manufacturers in developing countries required detailed information on a continuing basis regarding end-uses and the grade species and specification requirements of the importing countries in commercial volumes. Equally, importers and consumers needed to know in detail the properties as well as the approximate quantities of the wood products available in the exporting countries. The Working Party noted that some of this type of information was available through the work of ITC, FAO and UNEP. It was emphasized that the marketing problem or the market information required was often of a specific rather than general nature, and required direct contact with the market.

10. Ways to bring about the exchange of detailed information were discussed. It was recognized that developing countries would often have financial and other difficulties in establishing, on their own, market intelligence and promotion services in the major consuming areas. In this connection, it was suggested that more use could be made of existing timber trade organizations in many countries to obtain information on specific requirements. The delegation suggested that a trade promotion centre be established jointly by the competent international organizations. In this connection, the representative of IAIT described the scope of the activities of the IAIT International Trade Centre in the field of forest products. It was also

suggested that this form of marketing and promotion activity might be effected through the establishment of a co-operative tropical timber bureau in Europe and North America by a group of developing countries exporting forest products. Some delegations were of the opinion that trade missions from developed to developing countries could facilitate the exchange of market information and the establishment of trade contacts. Dissemination of information about importers' requirements and exporters' availabilities could also be accomplished through the network of commercial attachés at embassies and other such channels.

11. The Working Party stressed that export industries must develop expertise in marketing skills. Attention was drawn to assistance in these respects that was already available from various developed importing countries through (a) training courses and seminars in trade promotion methods; and (b) financial and other assistance in participating at trade fairs.

12. It was recognized that information about these and other forms of assistance was not being sufficiently widely disseminated. One delegation requested that the appropriate international organizations be kept advised of all such assistance offers so that they could bring them to the attention of all who might be interested.

13. The Working Party also noted the role that carefully planned and conducted promotion campaigns could play in bringing about the expansion of consumption of tropical hardwoods in importing countries. It was stressed that product promotion must be technically oriented. It was essential that promotional material should fully and accurately describe the properties, applications and availability of the product.

B. Case studies on export plans and prospects of specific developing countries in manufactured timber products (Forest industries development in West Africa; Export plan and prospects in manufactured timber products in the Republic of China)

14. The Working Party expressed its appreciation of the two case studies. It noted that the West African study drew attention to the problems of tropical forestry which are in fact, to a large extent, those of the secondary or lesser-known species, many of which have potential utilization properties but are still unknown in world markets.

15. The importance of their introduction on the local market was stressed as a first step in developing markets for these lesser-known species. Emphasis was given to the fact that the reaction of local demand for products processed mainly for export could provide a good base for production and could ensure the industry of a more

stable market in case of fluctuating demand in export markets. At the same time, the regeneration of forest areas should be reoriented towards easily marketable and faster-growing species so as to consolidate future development of the wood-using industries.

16. The paper submitted by the Republic of China illustrated what could be achieved through sound, integrated development of forest industries, well located with respect to markets and raw material supplies, and given low-cost technically proficient labour. It also drew attention to the dangers of over-investment in production facilities and of failure to secure sufficient raw materials supplies.

17. It was also pointed out that where limitations existed in raw material resources, the export of logs was likely to be reduced, to ensure adequate supplies for the expansion of domestic wood-processing industries.

C. Capacity surveys of plant facilities in developed countries

18. The Working Party took note of the paper on this subject prepared by the FAO/ECE Timber Division. The paper, which referred only to the situation in Europe, showed that availability of adequate sawmilling capacity as a whole had never been a source of concern in Europe. The actual theoretical capacity of this industry was known to be appreciably higher than present production. It was noted that sawmills processing tropical logs, or capable of doing so, were few in relation to the total number of mills, and as such were unlikely to present a major obstacle to further expansion of sawnwood exports from the developing countries, given the steady growth of demand in Europe.

19. With regard to the plywood industry, it was noted that actual production was probably much closer to the theoretical capacity of this more capital-intensive industry than was the case in the sawmilling industry. The Working Party recognized the statistical inadequacies and other difficulties encountered in this type of survey, but was of the opinion that it would be of value for the rational development of this industry to conduct surveys of its capacity. Many delegates, from both developing and developed countries, expressed the opinion that expansion of processing capacity in this industry should, where appropriate, take place in the countries of origin of the raw material.

D. Improvement of existing forest industries in the developing countries with the aim of expanding export trade

20. The principal document relating to the Working Party's discussion under this item was a paper of the same title prepared by the FAO Secretariat. The Working Party noted that wood-processing industries in developing countries all too often exhibit features of small size, poor equipment and inadequate skills which prevent their entry into export markets which require a quality product at competitive price.

21. The Working Party agreed that no simple solution to this problem existed, since every case was different. It stressed that the core of the problem was less that of not knowing what measures were required than in finding the means to implement them. Producers must be educated in the skills of the trade in which they engage, or wish to engage, and must have access to the capital and information needed to put these skills to work. The following means of effecting an improvement in industry were proposed:

- (1) Extension services to bring information and advice to existing producers.
- (2) Model production units to provide demonstration and training to operatives and management.
- (3) Grouping of small units to provide some of the benefits of size in the market place.
- (4) Centralizing research and information facilities to permit activities beyond the means of individual small producers.
- (5) Establishment of industrial advisory boards to assist the various wood-processing industries in their production and marketing problems.
- (6) Setting up of licensing systems to ensure that new units conform to sound standards of size, equipment, layout and location.

22. The Working Party recognized the considerable contribution already made through multilateral and bilateral aid schemes, in the form of fellowships for overseas training, the provision of technical experts, and the equipping, staffing and running of demonstration, training and research centres and seminars, in building up these skills and services. The Working Party took particular note of the technical assistance available from FAO, UNDP, and the ILO. The representative of the latter organization announced that it would convene a meeting, probably in September 1967, to deal with social and labour problems of the wood-using industries. The Working Party urged that these forms of assistance be accelerated and expanded.

...again, particularly in view of the special promise and logic of
collaboration between wood- and other industries in the importing and exporting countries
to transfer a transfer of skills and technologies and of capital to build up
the export capacity of the latter. It was widely recognized that the high
efficiency and low energy consumption involved in most mechanical forms of wood
processing are highly desirable, and at the initial stages of processing close
cooperation is essential. It was felt very much in the interests of the user
countries in the importing countries to collaborate in building up the efficiency
of supplier industries in timber producing countries. The latter, which in this
regard are rich in modern techniques, skills and equipment, and a market in the user
countries, have equal incentive to encourage and facilitate joint ventures. One
suggestion proposed that one form such collaboration could take would be the provision
of wood-processing plant and technical services to supplier industries, receiving in
return their products.

The Working Party noted that most processed forest products were the output of
what is known as "joint products industries". It warned that a wood-processing industry
could seldom be efficiently developed in isolation. Full use of the raw material
required a balanced, integrated assemblage of different, complementary plants.

The Working Party stressed the importance of quality of product and of the
reliability of its supply for the development of a successful export trade. Attention
was drawn to the role of grading in describing and controlling quality. Where they
are not in use already, appropriate grading rules must be adopted, and must be
enforced. Orderly development of the market for a product also requires continuity
and punctuality of shipments. Delegates also noted that the task of producing and
marketing widely acceptable products would be facilitated if progress were made in
the international standardization of wood products.

**E. Review of technical and pre-investment assistance rendered
under the United Nations Development Programme in the field
of forest and timber products of developing countries**

26. The Working Party noted with interest the review of technical and pre-investment
assistance in this field, which was supervised by FAO as the executing agency. It
noted that educational and research institutions, resource appraisals, forest
improvements and industry development were strong elements of the programme. Although
marketing and trade development were as yet only modestly represented in the field
programme, these activities could be expected to increase in the future.

F. Investment problems - information necessary
for requests for financing

27. The Working Party took note of the paper on this subject prepared by the joint FAO/IBRD Co-operative Programme and was informed of estimates of investment funds which might be needed by developing countries for the establishment and development of forests and forest industries in the period to 1975. A representative of the IBRD informed the Working Party of its loan policy. Discussion centred on the financing of forest plantations, and it was recommended that the World Bank and other international financing agencies and financial institutions of developed countries should be requested to widen the scope of their loans in the field of forestry so as to cover financing of economically sound plantation and reforestation projects.

G. An analysis of the effect of the tariff structure
of the major developed countries on exports of
semi-manufactured and manufactured timber products
from the developing countries

28. The Working Party considered the paper on this subject. In the opening discussion pertaining to this paper, the Chairman pointed out that it was within the terms of reference of the Working Party to make suggestions and recommendations to the Committee on Manufactures on this issue.

29. One delegation stated that tariff reductions should be initiated first on semi-manufactured products such as veneers and particle boards which are the products most logically and easily produced in the countries of raw material origin. Some delegates stated that tariffs were apparently less important than some production factors in hindering the growth of exports, and noted that some developing countries producing quality products had been successful in marketing veneer and plywood in developed countries even where they had to surmount tariff barriers.

30. It was considered by many delegations that discussion on tariffs should be limited in view of the current Kennedy Round negotiations and there was a feeling that significant progress would be made in that forum in substantially reducing tariffs in developed countries without reciprocation on the part of developing countries participating in the negotiations.

11. In examining the draft of the following resolution was adopted. The Working Party expressed the hope that the findings based upon the study will result in an appropriate reduction of tariffs, particularly for processed wood products. The Working Party felt that such a reduction in conjunction with the improvement of the factors which contribute to an increase of exports of processed wood and foresting materials. The elimination of non-tariff barriers should also be considered as an appropriate step for increasing these exports.

Outline for a section on wood products

12. The Working Party considered the outline in the discussion that followed the presentation of the outline, only two suggestions were made. One was that consideration should be given to recent developments in the shipment of packaged softwoods. The second was that further transport studies on pulp and paper should be undertaken at a later stage.

✓ Some delegations reserved their position on this matter, as they did not have present experts competent to deal with the question of tariffs.

11. The Working Party is to study the various proposals for the development of the forestry of the country and to report on the progress of the work. It is to be agreed that the Working Party will submit a report on the work done by it to the Government. It is recognized that the Government is responsible for the implementation of the recommendations and that the Working Party is to be kept informed of the progress of the work. It is further agreed that the Government will take such steps as may be necessary to give effect to the recommendations of the Working Party. It is further agreed that the Government will take such steps as may be necessary to give effect to the recommendations of the Working Party. It is further agreed that the Government will take such steps as may be necessary to give effect to the recommendations of the Working Party. It is further agreed that the Government will take such steps as may be necessary to give effect to the recommendations of the Working Party.

- (i) Research - the institution of effective control (intelligence and knowledge) and systems for developing suitable scientific methods for forest products and study of the possible results.
- (ii) Research operations - expanding and improving the work and knowledge of institutions of forest research - the study of ways and means of effecting better than the present state of the work and facilities and in forest research operations, is to be to improve the co-ordination between operations.
- (iii) Investment - facilitating the coming of investment capital for forest industries in developing countries, is particularly:
 - (a) joint ventures - study of the measures needed to make these effective and mutually attractive.
 - (b) project evaluation - examination of the ways and means of improving project evaluation by developing countries.
- (iv) Integration - study of the international problems which arise as a result of the joint product nature of the wood products sector, and of the implications this has for the development of stable forest industries. In this connection, the Working Party has one of its main objectives to be to report on this subject to the United Nations Conference on Trade and Development.

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... facilities in
... to implement the above.

14. Shipping ... under part III of
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... it was suggested
... widely based
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... of the Division of Invisibles
... One
... to be taken into account in making this study.

In all these matters it was recognized that education and training were of primary importance.

15. The view was expressed that implementation of some of these and other recommendations would profit from additional study, in some cases of a more detailed technical nature, in some cases at a regional or local level, to determine the particular application of various recommendations to different parts of the world. It was noted that much of such work fell logically into the domain of the inter-national organizations and other existing bodies and programmes, and where this was so, the Working Party had attempted so to indicate. Some delegations suggested that some items might be more effectively pursued through specially convened seminars, working parties or other forms of consultation.

16. The draft work programme as amended to reflect the discussion is attached as Annex II.

Chapter IV

RECOMMENDATIONS FOR CONSIDERATION BY THE COMMITTEE ON MANUFACTURES

24. The Working Party adopted the following recommendations:

I. Measures for building up the export potential of the developing countries of forest products

- (1) The long-term forest policies of developing countries should include the aim of building the infra-structure required for expansion of the forest products industries.
- (2) The development of woodworking industries must be preceded by Surveys to assure continuous availability of wood raw materials. More attention should be devoted to carrying out the forest inventories needed to acquire this information. In this connexion the Working Party supports the recommendations of the Sixth World Forestry Congress that efforts be made to achieve standardization of forest inventory terms to ensure comparability of results.
- (3) The regeneration of forest areas should be reoriented to favour commercially viable species so as to consolidate future development of the wood-using industries.
- (4) In view of the presently limited availability of credit for afforestation and reforestation, the World Bank and other international financing agencies and financial institutions of developed countries should be requested to widen the scope of their loans in the field of forestry so as to cover financing of economically sound plantation and reforestation projects.
- (5) Domestic and nearby markets should be developed as far as possible to complement overseas sales to developed countries. This would not only provide a sound basis to production but would also provide outlets for lower grades and would reduce the impact of fluctuations in the world market.
- (6) The level of log exports should be geared to the expanding requirements of domestic processing industries.
- (7) Direct co-operation on a commercial and technological basis should be encouraged between enterprises in developing and developed countries through promotion of joint ventures. (Although the possible pattern of

these countries. It should be recognized that the greatest need for financial assistance is in the areas of technical advice, community development, and investment. Such assistance should include payment for equipment and patents, travel in the countries, duty-free entry for plant equipment, facilities for procurement of land, public guarantees for investment funds and reduction of public charges and ensure raw material supply. In these countries the export tax on investment must be avoided.

- (8) Industrial advisory boards should be established to assist the various industries in their production and marketing problems.
- (9) Extension services should be established in developing countries to bring research results, training and advice to producers.
- (10) Action programmes should be established to secure training for workers and management. Demonstration production units in developing countries should form part of these programmes.
- (11) Small units should be grouped to provide some of the benefits of size to the market place.

II. Measures for increasing exports of the processed forest products (in particular sawn wood, plywood, veneer) of the developing countries

- (1) Export grading rules must be established as a means of describing and controlling quality. This must be accompanied by the training of those engaged in industry and trade in the application of the grading rules.
- (2) International standardization of sizes and specifications should be encouraged with active participation of all parties concerned.
- (3) In order to avoid duplication of effort, timber research institutions should co-ordinate their study programmes, research methods, and the species investigated so that the results achieved in one institute can be accepted and used in another.
- (4) Great attention must be paid by developing countries to consistently and with the co-operation of various nations, punctuality of shipments which are essential to orderly market development.

1. In order to require more information in the market situation, it
provides for various goods, services, and opportunities, and networks
of the reporting countries and to establish a more direct link
between the countries the following is recommended:

- (a) Full collaboration with other international bodies should regard
the activities in the reporting and dissemination of general trade
information.
- (b) There are efforts to take of other trade organizations of reporting
countries to make sure as specific report requirements.
- (c) The establishment of a temporary trade center in Europe and North
America by a group of developing countries reporting forest products
should be considered in order to provide the developing countries with
marketing and market intelligence services.
- (d) These organizations, trade objectives should be encouraged from developed
to developing countries to facilitate the exchange of market
information and the establishment of trade contacts.
- (e) Carefully planned and technically oriented trade promotion campaigns
should be conducted as a means of expanding awareness of tropical
products in reporting countries.
- (f) Short-term missions should be given to developing countries to enable
them to participate in trade fairs of interest to the forest products
sector.
- (g) Subsidies should be given to the recruitment of appropriate trade
experts of the developing countries to enhance trade services
provided to reporting developed countries to secure market intelligence
to carry on as to develop market contacts. The developed countries
should consider similar to the developing countries already provided
in order to assist in expanding trade promotion.

1. The evidence should be taken so far from the existing Party² appears as
the best that the Government could expect, and it is an appropriate
reference of the facts, particularly for the present and future. The
existing Party² will be a most important one, in conjunction with the
improvement of other factors, and it is a reference of aspects of
present and future development. The situation of our
country should also be considered in appropriate way for the future of
these aspects.

✓ Some suggestions received that parties in this matter as they did not have
present aspects compared to that with the question of parties.

Annex I

ANNEX I

Opening of the Session

17. In the presence of the Secretary-General of UNCTAD, the meeting was opened by the Director-General of UNCTAD, who made a statement which has been reproduced in Annex III to the present report. A meeting address was also given by the Chief, Forest Economic Branch, FAO, and this appears in Annex IV to the report.

Election of officers

18. Mr. S. J. S. (Spain) was elected as Chairman of the Working Party, and Mr. S. J. S. (Spain) as Vice-Chairman and Rapporteur.

Adoption of the agenda

19. The provisional agenda issued before the meeting was adopted subject to transposition of items 5 and 6. The agenda, as adopted, is reproduced below:

1. Opening of the session
2. Election of officers
3. Adoption of the agenda
4. Review of the developing countries' reports of processed forest products
5. Consideration of selected topics of the work programme
6. Consideration and adoption of the work programme for the Working Party
7. Any other business
8. Adoption of the report of the Working Party to the Committee on Manufactures.

Credentials and attendance

20. Credentials were received on behalf of experts from the following countries: Argentina, Austria, Belgium, Brazil, Canada, Chile, China, Congo (Democratic Republic of), Czechoslovakia, Ecuador, Federal Republic of Germany, Finland, France, Greece, India, Italy, Jamaica, Japan, Madagascar, Netherlands, Nigeria, Philippines, Poland, Romania, Sweden, Switzerland, Tunisia, United Kingdom of Great Britain and Northern Ireland, United Republic of Tanzania, United States of America, Yugoslavia. The International Labour Organization, the International Bank for Reconstruction and Development, the International Monetary Fund, the Contracting Parties to the General Agreement on Tariffs and Trade and the European Economic Community were also represented. The list of participants is reproduced in Annex V to this report.

CONCLUSIONS OF THE MEETING

41. The working party decided to hold its meetings in private, with the exception of the meeting at which the report on the Committee on Manufactures was adopted.

ADOPTION OF THE REPORT AND RECOMMENDATIONS OF THE COMMITTEE

42. This report, as amended during the discussion, was adopted by the working party at the closing meeting on 2 December, 1964. The working party agreed that although the discussions had been held in private to allow full and free exchange of opinions among the individual experts, its report and recommendations be given as wide a circulation as possible. It considered that this would materially assist in the process of encouraging the governments, industrial institutions and individuals concerned to putting the recommendations into effect.

43. Delegates from both developed and developing countries expressed satisfaction with the progress achieved by the meeting. The working party recorded its appreciation of the high co-operation and assistance provided to UNCTAD by FAO and ILO in connection with the meeting. It further expressed the hope that similar collaboration between international groups might be as effective.

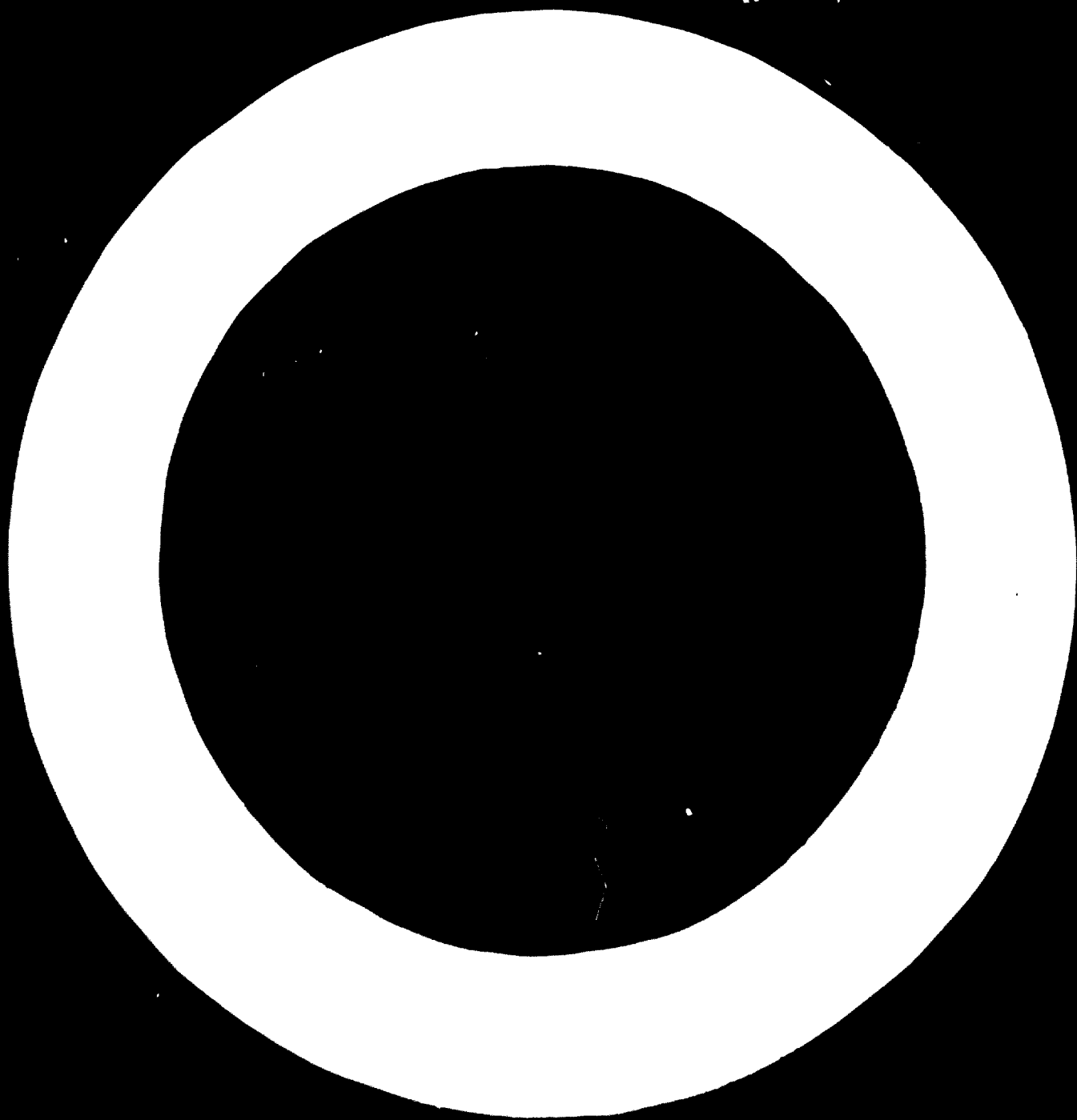
FINAL AGENDA OF THE SUBSEQUENT MEETING

44. A short list of topics to be discussed before and during the meeting is given in Annex VI.

ANNEX I

Terms of reference of the Ad Hoc Inter-Sessional
Working Party on Forest and Timber Products
(TD/B/69, paragraph 18)

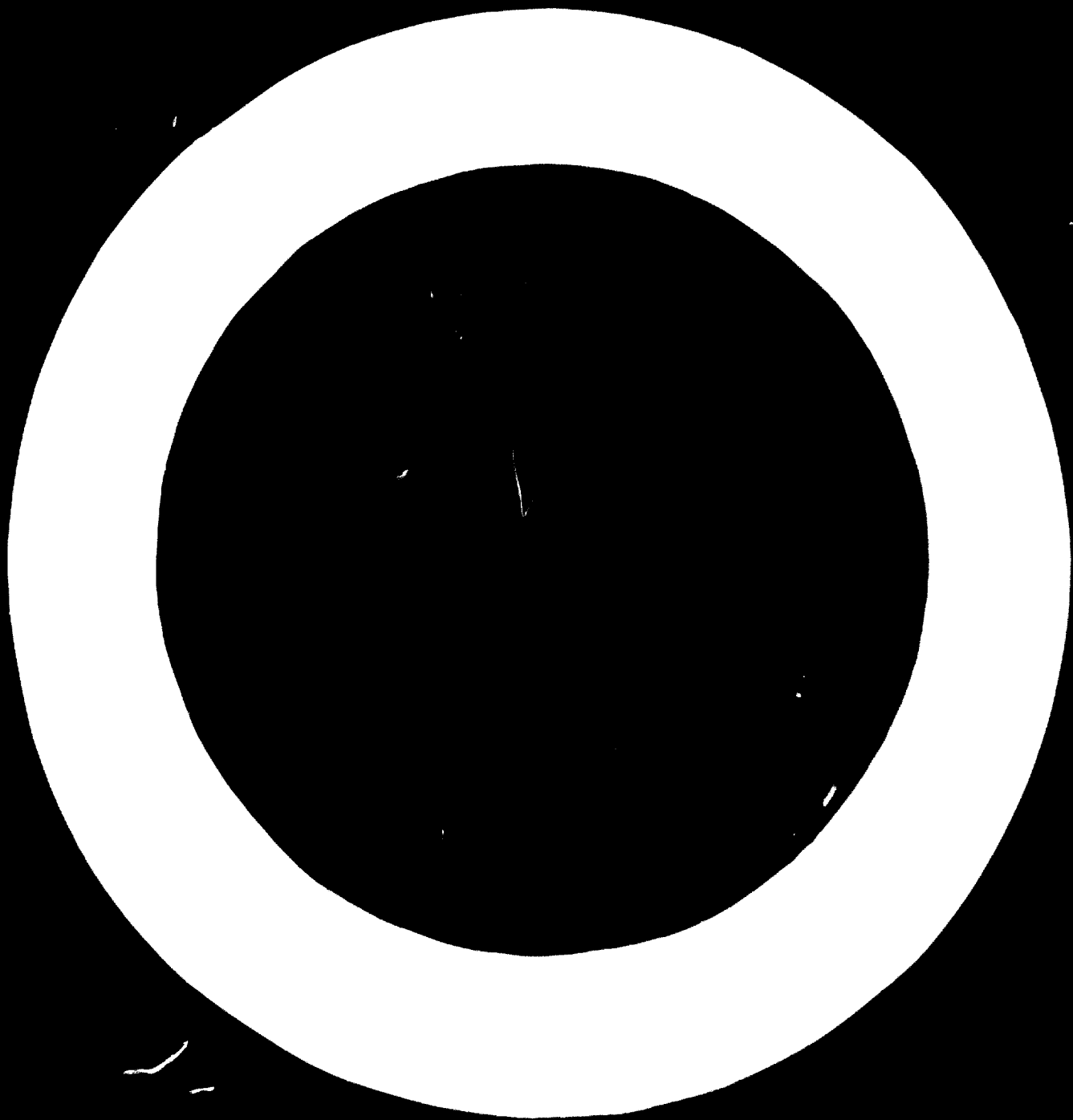
- (a) To examine, within the field of the terms of reference of the Committee on Manufactures, the opportunities of expanding the flow of processed forest products, including saw wood (coniferous and broadleaved), plywood, veneers, wood pulp, paper and paper board, from the developing countries, particularly to the developed market economy countries and to the socialist countries of Eastern Europe; in this context, to examine the scope for industrialization and investment, for assistance in forest-based industries, for the development of new products and other practical steps for achieving the expansion of exports of processed forest products from the developing countries;
- (b) On the basis of this examination, to draw up specific conclusions and suggestions for consideration by the Committee dealing with:
 - (i) measures for building up the export potential of the developing countries of processed forest products;
 - (ii) measures for increasing exports of the processed forest products of the developing countries;
- (c) In its examination of the foregoing questions and in formulating its conclusions and suggestions, the working party shall seek the collaboration of FAO and other international agencies with competence in this field.



ANNEX II

Development programme as amended during discussion

- I. Factors determining the export of processed forest products from developing countries, particularly to developed countries
 - (a) Assessment and evaluation of forestry resources;
 - (b) Assessment of infrastructural requirements;
 - (c) Investigation of the consumption requirements in the local market;
 - (d) Investment needs and the elimination of problems;
 - (e) Research on wood technology and forest industries;
 - (f) Education and training;
 - (g) Assurance of prime quality raw materials;
 - (h) Measures to establish grading rules, inspection of goods and promotion campaigns, and identification of other appropriate measures for export promotion.
 - (i) Aid to developing countries.
- II. Factors determining the expansion of imports by the developed countries of processed forest products from developing countries
 - (a) Growth in demand;
 - (b) Consumer requirements and the promotion of new species;
 - (c) Existing manufacturing facilities in the developed countries;
 - (d) Marketing;
 - (e) Tariff and non-tariff barriers.
- III. Factors relating to the provision of adequate transportation to overseas markets
 - (a) Existing shipping services;
 - (b) Shippers' councils;
 - (c) Harbour facilities;
 - (d) Freight rates;
 - (e) Handling of product from factory to consumer.
- IV. Case studies on specific developing countries and their export alone, problems and prospects in respect of manufactured timber products



STATEMENT BY THE SECRETARY, ECONOMIC AND FINANCIAL AFFAIRS

It is a great pleasure for me to be able to report to the Working Party on Forest and Timber Products. The Working Party has been set up jointly by the EC and the EC and on the basis of the knowledge of the present situation of such an industrial activity.

Among the recommendations addressed to the Working Party in the final part of the first set of letters and reports on trade and timber products, it should consider questions of integrated programmes of research and studies of industrial cooperation between developed and developing countries, and the provision of technical assistance for the setting up of projects in such industries if future industrialization in developing countries could be helped through the resource enrichment of these countries. There shall be a particular emphasis on promoting integrated programmes of research and studies of industrial cooperation between developed and developing countries. In order to establish these programmes, studies determining the requirements of the developing countries in the various fields of industry based on inputs from developing countries are extremely useful.

3. Such a study had been made in respect of Europe - requirements of tropical forest and timber products, in the publication European Timber Trade and Forestry, prepared by EC jointly with the Economic Commission for Europe. This study covered the scope for imports of forest products by Europe by 1975. A summary of this study was presented to the Committee on Manufactures of EC in early this year, and the Committee felt that as a working party of experts from interested developed and developing countries should be set up to go further into the question and report to it, giving specific conclusions and suggestions on the practical measures to be taken so as to build up the export potential of the developing countries and to increase the exports of forest products from developing countries.

4. The programme of work of the Working Party has been devised with this end in view and is presented for your consideration and approval. The papers before you have been prepared at rather short notice and are not a complete coverage of the items of the programme of work. It is hoped, however, that they will provide you

... request a number of participating countries have also submitted papers relating to the subject before you for consideration.

... of the programme that would be ... of processed and manufactured products from the developing countries to the industrial countries of Europe, North America and Japan ... you would also that timber and forest products are coming to play an increasingly important role, ... in this line of work.

... that through increased combined exports into Europe have increased, that is significant is that compared with other countries the United Kingdom exports a higher percentage of these requirements as processed products than do our industrial (large) ... in 1975 the United Kingdom reported 20,000 t¹ of combined logs but 90,000 t¹ of combined firewood operations.

... of total exports in 1975 ... of plywood into four tropical logs, of which only 20 per cent are actually manufactured in developing countries. The Netherlands and the Federal Republic of Germany include in their higher percentage than the United Kingdom of plywood reported four tropical countries in the range of these total exports.

... of the total exports. There should be considerable scope for further development in the export of tropical resources to Europe. The figures estimated for recent consumption in Europe are 2.4 million t¹ in 1977, which is ten-and-a-half times the figure for 1950.

... just under 20 per cent of these plywood and about 10 per cent of these resources. It also receives 8 to 10 per cent of their industrial logs.

... 2-10 million t¹ (combined operations) of resources, plywood for the logs for these

producing in Europe), plus about 1 million m³ (groundwood equivalent) of broad-leaved sawwood or saw logs in 1975, in addition to the level of imports in 1960. "There could be however (and I quote) 'a world of difference between Europe's theoretical, or possible, demand for tropical hardwoods and the ability of the regions to satisfy their demands.'" It is this gap between the real possibilities, and the steps needed to fulfil them that the Working Party has to consider and help to narrow down and to bridge. It is noteworthy that net imports of broad-leaved logs, sawwood, plywood and veneers grew in five years to 1965 approximately in line with the long-term expectations.

11. An analysis of the demand situation in selected European countries shows:

- (i) In the Federal Republic of Germany, a trend for the increased consumption of tropical species in plywood for some years. In veneer production, the proportion of tropical wood was 64 per cent;
- (ii) in France as much as 76 per cent of the plywood consumed is of tropical origin. It is estimated that the total requirements of tropical wood for veneer manufacture will go on rising by 8 to 15 per cent per annum;
- (iii) in the United Kingdom, there is a trend for tropical hardwood volume to decrease in the furniture industry, but there is a rising trend in the building/joinery sector, and the same is true for parquet;
- (iv) in the Netherlands, the growing use of Asian hardwoods in particular indicates a rising trend in demand.

12. These are but selective indications drawn from the papers before you. It is hoped that the Working Party will be able to suggest measures to enable the developing regions to supply the European market with the volume, quality, and specifications of manufactured timber products required at prices economic to the consumer.

13. The estimates by the authorities in the United States show that they project the imports of tropical hardwood, plywood and veneer by 1975 to be 4 million m³ (in roundwood equivalent), mainly from South-East Asia. These are part of longer-term projections up to the end of the century. In 1961 these imports totalled 1.9 million m³.

14. As to Japan, its consumption of cement is estimated at 7.5 million tons (rounded equivalent), which is three times the figure. It will have to import its tropical hardwood requirements.

15. Against these requirements, many developing countries, in 1964, exported forest products of the value of \$720 million. Of these, timber and wood products accounted for nearly three-quarters of their exports. Among the most successful exporters of sawwood in recent years is Malaysia. The success of Malaysia in capturing so much of the growth in most important markets for tropical wood products would appear to rest on the following factors:

- (i) the consistently high standard of its export sawmilling industry;
- (ii) the imposition of grading rules laying down standards for producers and exporters;
- (iii) the ability to upgrade the product increasingly demanded by the importer;
- (iv) as labour and other costs rise in the importing developed countries, producers grow to have more secondary processing carried out in the countries of origin, and to have sawwood shipped packaged rather than loose. The relatively highly developed and tightly controlled industry in Malaysia has been able to achieve this more readily than the industries in most other developing countries.

16. The Philippines fared rather less well, partly due to competition from the in-transit industry in Japan - exporting lumber sawn from imported Philippine logs.

17. In West Africa, Nigeria, Ghana and the Ivory Coast, all increased their exports of sawwood. Of these, the Ivory Coast has achieved a fairly vigorous expansion.

18. In Latin America, Nicaragua and Colombia increased their exports of sawwood to the United States of America.

19. Three-fifths of the tropical hardwood exported to developed countries is used in the form of plywood and veneer. But the quantity exported as such, i.e., as plywood and veneer, is perhaps 25 per cent of the total. Some of the potential importing countries are by now dependent on imported tropical hardwood logs. It

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17. We look forward to fruitful and constructive results from your deliberations. These deliberations should lead to specific conclusions and suggestions on practical measures to be taken (in the form of inter-governmental or other types of action) which will lead to an increase in the trade in processed forest products manufactured in developing countries.

18. We hope that your report, which will be submitted for consideration to the JETAB Committee on Manufactures at its forthcoming session, will achieve these objectives and will enumerate ways and means of attaining them.

Statement

Statement by the Chief, Forest Products Branch, FAO

1. We in the Forestry and Forest Products Division of FAO are most pleased to have this opportunity to cooperate with the Manufactures Division of UNCTAD in arranging this Working Party on Timber and Forest Products.

2. You may well ask why we welcome the opportunity to further the formation of yet another international working group in this field. You may suggest: surely there are already enough bodies to look after forestry and forest products, and that there are more meetings than can be readily attended by government representatives of small countries without pressing hard on the time of busy officers and on limited budgets. You may sense that we of Forestry in FAO are already hard put to cope with thousands of urgent tasks with a small staff, and that we sometimes lag in our programmes of serving both developed and developing countries. Why then do we welcome still another meeting of a new group with yet another co-operating agency?

3. First, we consider the subject of this meeting to be of great importance. In the next few minutes I will try to tell you why. A few months ago in Madrid, FAO presented to the World Forestry Congress a document entitled "Wood World Trends and Prospects", a collection of regional studies conducted jointly with the regional economic commissions and of special studies undertaken by Canada and USA and the USSR. It was the first world study built up on a country-by-country basis which examined past trends in consumption, production and trade of forest products, and which looked to the future's problems and prospects. The general trends are well known to many of you:

There is a rapid growth in requirements for forest products as a whole - unmatched by any expansion prior to the end of World War II - but with diverse developments in different areas and products. Notable is the rapid growth of paper consumption and the phenomenal growth in wood-based panel production.

Some areas are growing rapidly in their wood deficit position, e.g. EEC, the UK, Japan and to some extent, the United States. Other areas are importing, in increasing amounts, certain types of forest products.

Matching these shortages are, of course, expanding exports from wood-surplus areas - notably Canada, the USSR and some of the tropical forest areas - especially West Africa and South-East Asia.

1. The forest products of the world, and more particularly the tropical forest products, have long been a source of supply for the needs of the developed countries.

4. Indeed, the forest products of the world, and more particularly the tropical forest products, have long been a source of supply for the needs of the developed countries. It is all our interests that this is so, and this is our duty.

5. You are undoubtedly aware of what is considered to be the most important problem of this half-century - the growing gap in economic well-being between two major groups of countries lying largely in two parts of the world.

6. It is generally recognized that the growth prospects for the developing countries are closely linked to their ability to raise their foreign exchange earnings; that at the present time they are highly dependent on a limited range of traditional exports of primary products, predominantly of agricultural origin; and that it is necessary to lessen this dependence by progressively developing and diversifying their economies and stepping up their exports of processed goods and manufactures.

7. Unfortunately, most of their traditional exports are products - largely foodstuffs or agricultural raw materials - the demand for which in the developed countries is already largely satisfied and is thus growing slowly or at best, modestly. Forest products are a notable exception but, again unfortunately, up to now most of the expansion of exports from developing countries has been largely in the form of unprocessed wood and, in contrast, their imports of processed forest products, notably pulp and paper, are growing rapidly and threaten to worsen severely the unfavourable balance of trade of many developing countries.

8. What the developing countries, with the necessary co-operation of the developed, must ensure is that they make the most of the opportunity that lies in the expanding demand for forest products - some of which are based on woods peculiar to the tropical areas - by obtaining the development impetus from further processing of their raw wood resources. This is why we consider the subject matter of the agenda so important.

9. The second reason that we welcome this meeting is that it puts a specific group of problems before not only foresters and forest industrialists (who indeed often have failed to get together when it would have been advisable), but also

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11. Finally, we must identify what these countries may want in which conditions for expanding exports. In the highly processed forest products sector, export to the national markets of trading partners. Long histories of increased trade flows exist in both developing and developed countries. In the former, the varying degrees, resources available are lacking, infrastructure, from logging roads to port facilities and services from forest administration through skilled workers, sales organizations or inadequate capital, particularly in foreign exchanges, is in short supply. Domestic markets are small and the complementary development of production to serve both local and foreign markets is thus difficult. Many of the problems are symptoms of underdevelopment. In the developed countries, tariff barriers protect home industries from possible outside competition even when wood raw materials are imported free or even when this raises the cost of goods to consumers and draws labour into work which is less than optimal.

12. But gains have and can be made. The situation in most of the developing countries is improving through the aid of international agencies and bilateral aid from developed countries in strengthening institutional arrangements, appraising the forests, improving the industrial technology, in pointing out investment opportunities and even in supplying capital at low cost. There has been some small easing of tariffs for sawwood in some developed countries and in a few there are campaigns to further the sale of tropical timbers.

13. The growth of domestic markets in developing countries will increasingly enable the use of a greater range of species and qualities of raw material and can provide an outlet for grades which will not bear heavy transport charges.

14. But much remains to be done. Even the more readily accessible of tropical forests are not completely inventoried even on a reconnaissance basis. Knowledge of the resource is fundamental to estimates of costs and returns. Specific project

proposals for mill establishments are lacking. Conditions for establishment in developing countries are seldom eased as they are in some of the developed countries, particularly those bearing continued growth on remaining resources. Relief from taxation during industrial infancy, customs exemption on capital equipment, foreign exchange privileges, freedom of entry of foreign employees and tax credits for reinvestment in the country can do much to entice foreign capital and promote industrial growth, provided at the same time new industry will respect national sovereignty, undertake a programme of worker training and is willing to assume an appropriate share of responsibility in community development.

15. There is the problem of tariffs and their inhibiting effect. It may be that, because of the special position of forest products, you will wish to consider the advantages and disadvantages of proposing a discriminatory tariff favouring developing countries with respect to the more highly processed items in the group and that this be made a test case for a broader application of this principle.

16. In any event, we hope that delegates will not parade the problems and inherent difficulties of underdevelopment as reasons why nothing can be done, but rather that they accept these as recognized and will tackle vigorously the task of deciding what to do about them.

17. You may not agree with what I have said. It is sometimes suggested that the developed countries expressed concern over the plight of an economically divided world is only hypocrisy, and that they wish to protect their favoured position at all possible costs; that the developing countries wish to tackle and solve these inherent problems by work and effort are false and their only concern is to carry favour of their fellows by denning the pattern of the past and to gain position by the force of their indignation. If this is so, I suggest that this Working Party is not apt to be successful. But, as we think it so, you feel as we do - that there is progress to be made in pointing up faults and correcting them - then this Working Party has a useful function and a busy future.

JUNE 7
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UNITED STATES DEPARTMENT OF COMMERCE

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RECONSTRUCTION AND DEVELOPMENT

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INTERNATIONAL TRADE DEVELOPMENT

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COOPERATION BETWEEN THE UNITED STATES AND THE WORLD

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INTERNATIONAL ORGANIZATION

COOPERATION BETWEEN THE UNITED STATES AND THE WORLD

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FOREST AND WILDLIFE
COMMITTEE REPORT

COMMITTEE REPORT

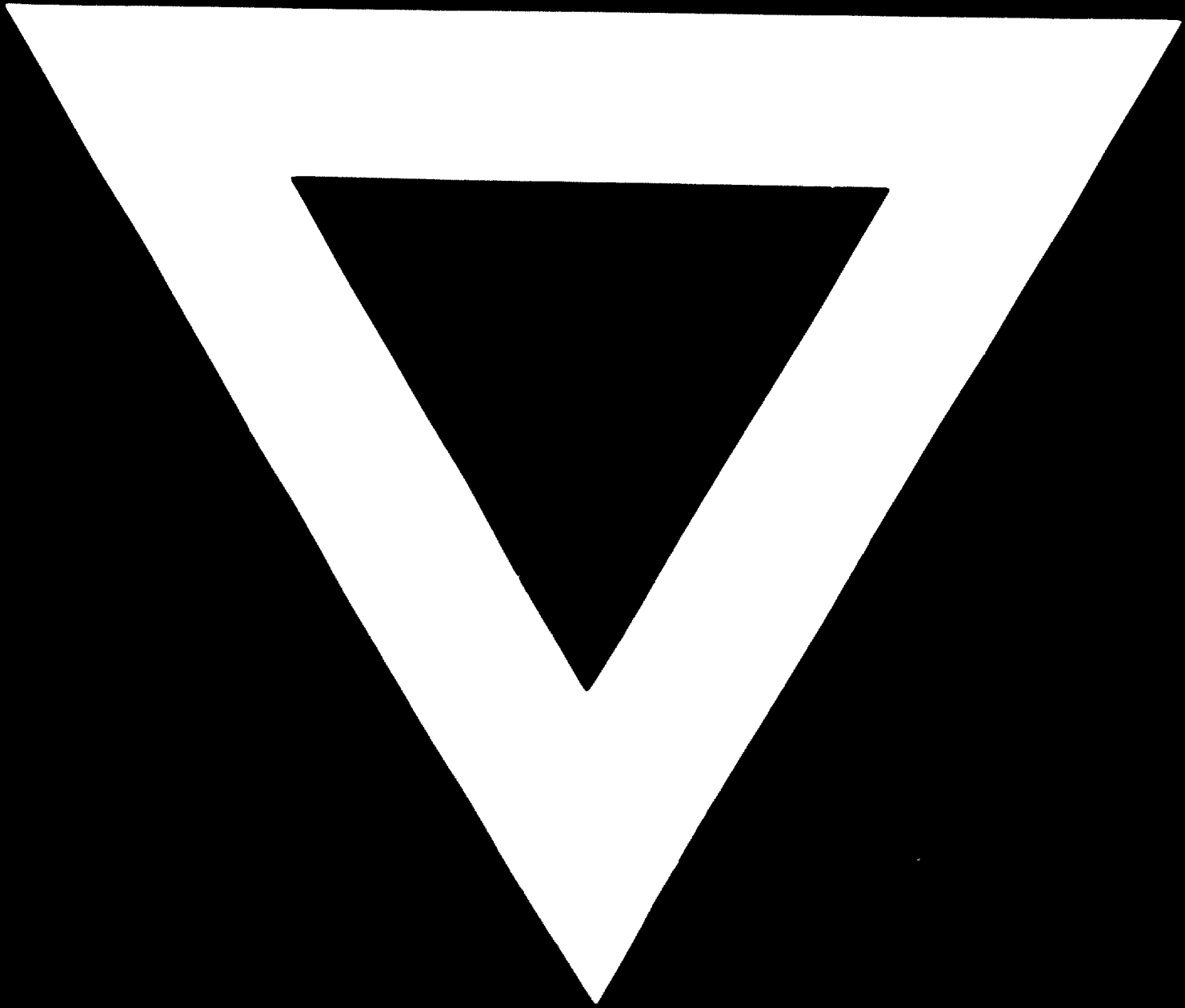
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<u>Symbol</u>	<u>Title</u>
TD/B/C.2/AC.2/10	The export of processed forest products from developing to developed countries - Paper presented by the FAO secretariat
TD/B/C.2/AC.2/11	Growth of demand for tropical wood products in Europe - Note presented by the FAO/ECE Timber Division
TD/B/C.2/AC.2/12	A case study on export plan and prospects in manufactured timber products in the Republic of China - Note by the UNCTAD secretariat
TD/B/C.2/AC.2/13	Estimates of the demand for tropical wood products in Japan - Note presented by the Government of Japan at the request of the UNCTAD secretariat
TD/B/C.2/AC.2/14	Agenda
TD/B/C.2/AC.2/15	Opening address by Dr. S.L. Pringle, Chief of the Forest Economic Branch, FAO
TD/B/C.2/AC.2/16	Opening address by Mr. S. Vohra, Director, Manufactures Division, UNCTAD
(TD/B/C.2/18) (TD/B/C.2/AC.2/17)	Report by the <u>ad hoc</u> joint UNCTAD/FAO Working Party on Forest and Timber Products to the Committee on Manufactures

Limited documents

TD/B/C.2/AC.2/6.1	Note by the Secretary-General of UNCTAD - (Survey by the C.I.T. International Trade Centre on Western European Market for plywood and veneer)
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