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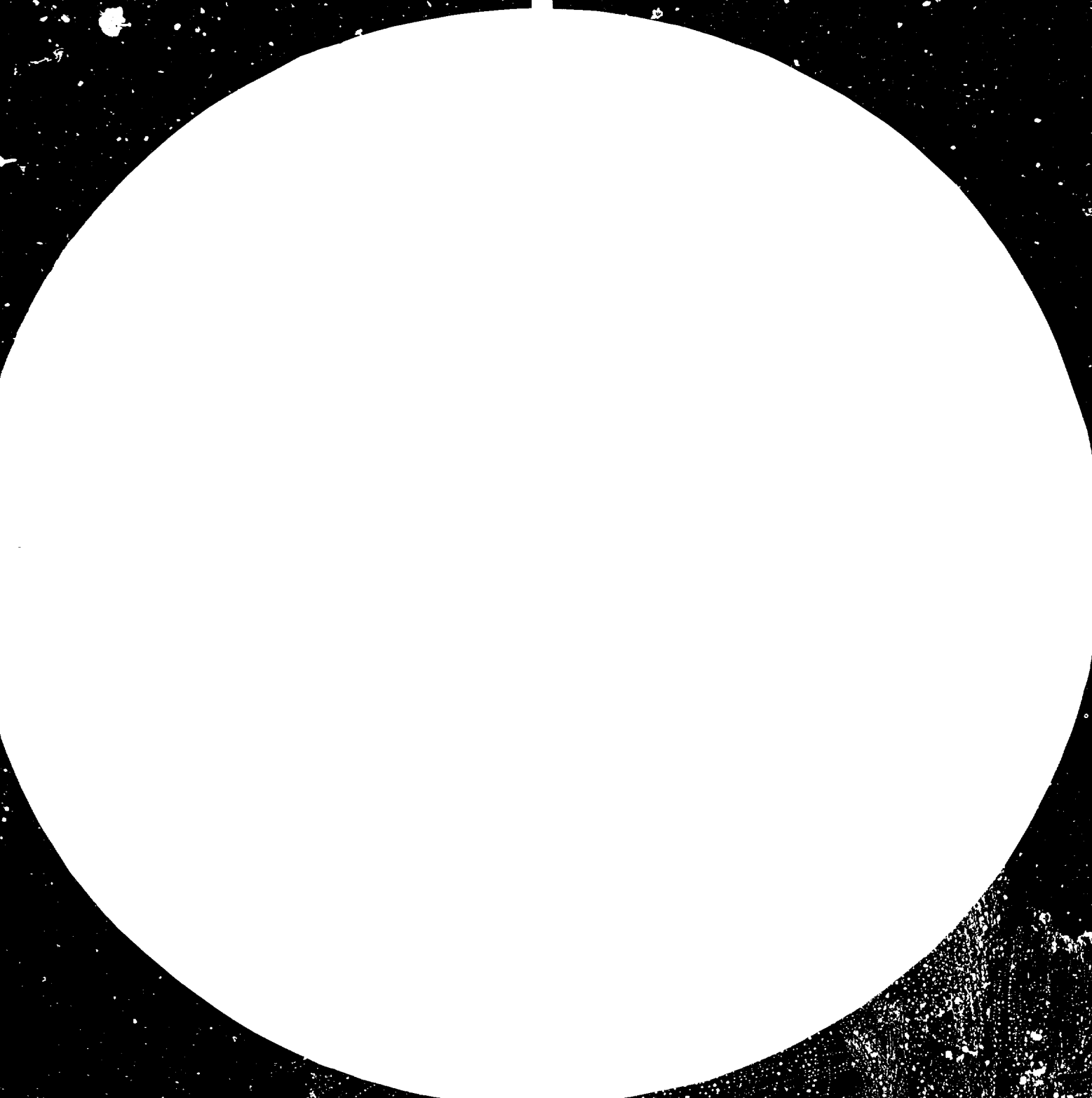
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Global Preparatory Meeting for the
First Consultation on the Wood and
Wood Products Industry

Vienna, Austria, 24-26 January 1983 .

DRAFT REPORT *

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PREFACE

The System of Consultations

The Second General Conference of the United Nations Industrial Development Organization (UNIDO), held at Lima, Peru, in March 1975, recommended that UNIDO should include among its activities a system of continuing consultations between developed and developing countries with the object of raising the developing countries' share in the world industrial output through increased international co-operation. ^{1/}

The General Assembly, at its seventh special session in September 1975, in its resolution 3362 (S-VII), decided that the System of Consultations called for by the Lima Declaration and Plan of Action should be established at global, regional, interregional and sectoral levels ^{2/} and that UNIDO, at the request of the countries concerned, should provide a forum for the negotiation of agreements in the field of industry between developed and developing countries and among developing countries themselves.

The System of Consultations has been established under the guidance of the Industrial Development Board. At its fourteenth session, the Board decided to establish the System of Consultations on a permanent basis with the following main characteristics, including those described in its past decisions:

(a) The System of Consultations should be an instrument, through which the United Nations Industrial Development Organization (UNIDO) would serve as a forum for developed and developing countries in their contacts and consultations directed towards the industrialization of developing countries; ^{3/}

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- 1/ "Report of the Second General Conference of the United Nations Industrial Development Organization" (ID/CONF.3/31), chapter IV, "The Lima Declaration and Plan of Action on Industrial Development and Co-operation", para. 66.
 - 2/ Official Records of the General Assembly, Seventh Special Session, Supplement no. 1, para. 3.
 - 3/ Official Records of the General Assembly, Thirty-fifth Session, Supplement no. 16, para. 151(a).

(b) Consultations would also permit negotiations among interested^{4/} parties at their request, at the same time as or after consultations;

(c) Participants of each member country should include officials of Governments as well as representatives of industry, labour consumer groups and others, as deemed appropriate by each Government;^{5/}

(d) Final reports of the Consultations should include such conclusions and recommendations as agreed upon by consensus by the participants as well as other significant views expressed during the discussions.^{6/}

Consultation on the Wood and Wood Products Industry

The Industrial Development Board, at its fifteenth session in May 1981, decided to include the First Consultation on the Wood and Wood Products Industry in the programme of consultation meetings to be convened in 1982-83. In accordance with the established work programme for the preparation of the First Consultation and the Agreement signed between UNIDO and the Government of Finland, the First Consultation on the Wood and Wood Products Industry will be convened from 19 to 23 September 1983 in Helsinki, Finland.

The Director General of the Food and Agriculture Organization of the United Nations and the Executive Director of the United Nations Industrial Development Organization have agreed that the two organizations should collaborate in the preparation for the convening of the First Consultation.

In order to identify priority issues to be submitted for consideration at the First Consultation, the UNIDO secretariat has convened a Global Preparatory Meeting.

Prior to the Global Preparatory Meeting, preparatory activities have been undertaken at the regional level and they included.

- Preparation of regional papers on the wood and wood products industry in Africa, Asia and Latin America.
- Convening of Regional Preparatory Meetings for Africa, Asia and Latin America.

On the basis of the conclusions and recommendations of the regional preparatory meetings and of the work carried out by the secretariat UNIDO has selected issues as a basis for the deliberations of the Global Preparatory Meeting.

^{4/} Ibid., para. 151 (b)

^{5/} Ibid., para. 152

^{6/} Ibid., Thirty-second Session, Supplement no. 16, para. 163

I. AGREED CONCLUSIONS AND RECOMMENDATIONS

II. ORGANIZATION OF THE MEETING

1. The Meeting was convened in Vienna on 24-26 January 1983 as part of the preparations for the First Consultation on the Wood and Wood Products Industry. It was attended by 21 participants from 19 countries, a representative of a regional organization, three representatives of a labour organization, representatives from UN organizations and several observers from the Permanent Missions accredited to UNIDO (the list of participants is included as Annex I).

Opening of the Meeting

2. The Meeting was opened by Mr. A. Hacini, Head of the Negotiations Branch of UNIDO, who explained the origin and scope of UNIDO's System of Consultations. He also indicated that the purpose of the Meeting was to advise UNIDO on the selection of priority issues that might be considered at the First Consultation. He stressed the fact that out of the five issues suggested by UNIDO, and others which might be proposed by the participants only a limited number could be selected in order to allow for thorough discussion of each issue at the Consultation and achievement of action oriented conclusions and recommendations.

Election of officers

3. Messrs. Makon Wehiong (Cameroon) and R. Roberts (Canada) were elected Chairman and Vice-Chairman respectively.

Adoption of the report

4. The draft report of the Meeting was adopted by the Meeting at its afternoon session on 26 January 1983.

III. SUMMARY OF DISCUSSIONS

Forest management policies

5. This issue was introduced by Mr. J.P. Lanly, Chief, Forest Resources Development Branch, FAO, on the basis of a document prepared by FAO and entitled "Management of Forest Resources in Developing Countries".
6. Some important aspects in relation to forest management were stressed, in particular the fact that the great majority of productive forests of the developing countries were mixed broadleaved forests, that they were being destroyed at a rate ten times higher than that of reforestation and that a very small proportion of them was being subject to intensive management.
7. There was agreement in the meeting that in order to obtain a rational utilization of the wood resources in developing countries an evaluation of them in the way of inventories is an essential tool to determine the quantity and quality of the resources available. The need for an adequate legislation was stressed, since an adequate legislation indicates how inventories are to be undertaken, how to log the forest and how the forest should be treated once it has been logged over.
8. The ownership of forests was mentioned as one of the problems which must be looked into when dealing with this subject which is directly related with the legislative aspect of forest management. It was indicated that account must be taken of the fact that in some countries modifications in the ownership of forests might be necessary, as well as the involvement of the local population in the administration of forests, in order to improve forest management.
9. There was agreement about the fact that there was need of further research into the pros and cons of alternative logging methods, i.e. selective cutting versus clear cutting. Various participants expressed their views on the most adequate reforestation or afforestation methods. It was stressed that plantations should be near the industry, that means near the end user. The use of fiscal incentives to promote plantations was indicated by one participant in this regard.
10. One participant pointed out the fact that developing countries could share the experience obtained during the last years with the use of fast growing species which are not only used for the energy and pulp, but also for construction, furniture, etc. Concerning the areas to be devoted to forestry it was pointed out by one participant that there are many areas which are not apt for agriculture or cattle raising which might be utilized for forestry.

11. Regarding the fast growing species one participant voiced the opinion that this would constitute the major raw material supply for the wood industry and that a lot of research has still to be directed towards their possible uses. In this regard he stated that generally fast growing species are used for a specific purpose only, but that recent research has been shown that they can be used for mechanical and chemical processes, too. He stressed that an international action on this point could give important results.

12. The concern was voiced that the wastes from cutting are not adequately utilized in developing countries. It was said that between 40 and 50 per cent of the growing stock felled in harvesting operations was left unused in the forest and that ways should be found to make adequate use of this waste.

13. Several participants stressed the need of adequate financing as one of the main constraints to the intensification of forest management. In this regard one participant pointed out a concrete experience of a joint-venture between a developed and a developing country in the field of forest plantations. The developed country providing finance at very low interest rates, the principal being paid only when the forest becomes economical, linked with the export of semi-processed products to the developed country involved. It was suggested by the same participant that the way to solve the problem of finance in plantations might be through the forming of joint-ventures between users and consumers.

14. Emphasis was put on the importance of human aspects of forest management in developing countries such as alleviation of rural poverty which is the main cause of deforestation and the possibility of income and employment generation in forest management operations. The need for training for forest workers at all levels was pointed out by several participants. One participant indicated that logging has a very high rate of accidents in comparison with other activities and that safety problems should be looked into by the competent UN agencies.

15. One participant from a developed country stated the conviction that forest management must be the background theme for the discussion of the wood industry. But, in view of the complexity of the problem, it was proposed to concentrate mainly on items referring to the production aspects of forestry, linked with the forest products industry. Sustaining this view another participant from a developed country pointed out that present levels of consumption of hardwood are low in developed countries and although giving adequate importance to the problem of forest management policies, developing countries might be better helped by increased demand and consumption of hardwood in developed countries.

Promotion of commercially less accepted species

16. This issue was introduced by Mr. Oswin P. Hansom, Deputy Director of the Timber Research and Development Association (TRADA), England.

17. There was agreement among participants that the problem of the utilization of commercially less accepted species merited special attention. The fact that only a few of the several thousand existing species are being currently used was said to be an indication of the lack of a rational utilization of forest resources. It was further stated by participants that the promotion of commercially less accepted species could save some of those species which are presently known as primary.

18. Regarding promotion activities one participant from a developing country pointed out that the Common Market had already started some years ago the promotion of several unknown species. Out of his experience he underlined the paramount need of a common nomenclature of merchandable species, indicating the damage which might be done to the marketing of a specific specie if its name was changed. On this point, however, another participant although accepting the need of a common nomenclature, stressed the fact that similar species grown in different environments can have different technical properties. The second aspect stressed by the first participant was the fact that in order to be able to promote a specie, adequate quantities are needed and that from the point of view of the consumer there exists the need of a continuous supply over a reasonable period of time in adequate quantities.

19. It was further stated that in order to promote commercially less accepted species government action is needed in the way of a reduction of export taxes, the reduction of freight rates and other measures.

20. There was concensus among participants that due to the fact that many species with perhaps similar technical properties were available in small quantities, an adequate way of promoting their use was grouping them. In this connection it was said that even though many institutions are dealing with the problem, a lot has still to be done. In this regard one participant stressed the fact that in the case of grouping timber for use in construction according to the strength, durability and shrinkage, the mixing of species poses several problems which still have to be dealt with.

21. Several participants pointed out the fact that one of the main uses of lesser known species are the local markets, especially in the secondary industry like the use of wood in housing. Reference was made in this regard to existing

programmes in developing countries, and to enlarging the domestic market through vast programmes of promotion of wood in housing.

22. It was stated that there is a lack of information on possible end-uses of commercially less accepted species on one side, and of the technical properties on the other. It was said in this regard that producing and consuming countries should jointly perform market studies regarding grades and end-uses of tropical timber. Also, there is a need of technical assistance by developed countries to help developing countries to develop new methods and new products.

23. One participant from a developed country stressed the fact that a lot of research will be needed in the preservation methods for commercially less accepted species for their use in the local markets. A participant from a developing country pointed out that one main reason for the lack of the use of the so-called commercially less accepted species was the inadequate transfer of technology, which was due to the fact that producers used machinery designed for primary species. Hence, he concluded that in order to obtain an adequate use of commercially less accepted species the development of appropriate technologies was of first importance. In this regard he stated that efforts in international co-operation were necessary to create adequate technologies in the producing countries to make proper use of commercially less accepted species and to disseminate this knowledge among producing developing countries.

24. On the marketing of commercially less accepted species one participant stressed again the need of grouping species in order to obtain volumes and quality of these species. In this regard he recalled the experience of the setting up of centres for developing countries to group, cut, dry process and pack timber. He further stated the need to increase jointly with developed countries the prestige of the commercially less accepted species by inter alia the maintenance of high levels of quality, the identification of new products, etc.

25. There was consensus among participants that the promotion of commercially less accepted species provide considerable scope for international co-operation. It was stressed by several participants that there is a need for adoption of an action programme to facilitate and encourage the better use of these species. Action programme among other activities should include: joint research on technical properties and resource research, preparation of guidelines for grouping, international standardization, use of mixed species for housing and construction.

Transport problems, especially those related to shipping

26. This issue was introduced by Mr. Peter Salgo.

27. The meeting agreed on the fact that freight costs represent an extremely high percentage of fob prices and that there is a need to find cost-saving methods, since reductions in freight costs reflect an increased revenue for producing countries. One participant from an exporting country sustained the view that high freight rates hamper the possibilities of exporting products with a higher value-added.

28. On the high freight rates it was said that in the case of conference lines they bear no relation with the distance and the real cost of transport. However, it was pointed out that several problems exist in this connection, like exclusivity agreements, obligation of using local shipping lines, etc.

29. On the use of containers it was said by one participant that several problems persisted. For example, the problem of humidity has to be taken into account. Also, it was said that containers come back empty, which of course increases the cost of this type of transport. Also, that it should be borne in mind that many ports still lack facilities for the handling of containers.

30. One participant pointed out the need to include the problem of insurance in the discussion of transport problems.

31. The need of constructing terminals in order to group smaller shipments was highlighted by several participants. In the case of South-East Asian countries it was said that the existence of many islands on which logging was taking place called for a solution of that type. An experience taking place in Brazil was also discussed in this connection.

32. Several delegates pointed out that the problem of transport should not be restricted to shipping but take into account the need of roads, adequate port facilities and infrastructure in general. One participant from a developing country stated that only problems of internal transport should be dealt with and that shipping should be discussed at a different forum. This view was partly sustained by a participant from a developed country who said the consultation should restrict itself to issues where concrete results might be envisaged and that shipping might come up as a topic under other issues to be discussed at the Consultation.

Development of primary and secondary processing

33. The presentation of these issues was made by Mr. Gotthard Heilborn for primary processing and by Mr. Horatio Brion for secondary processing.

34. The participants agreed upon the need to support the initiatives by developing countries to develop to go into primary and secondary processing, taking into account that this is an industry which is based on local resources which is labour intensive and whose products are needed in any country.

35. One of the major problems faced by the wood industry in developing countries was said to be the low recovery rates. These were reported to be as low as between 20 and 30 per cent for saw milling. The question of how to increase this recovery was presented as one of the main problems to be dealt with at the consultation. Without going into detail participants stressed that the training of manpower and availability of adequate equipment were among the main answers to these question.

36. The low recovery rates in developing countries compared with developed countries raised the question of the use of residues. Some participants suggested that this should include residues from the forest and from processing. On the use of residues it was suggested that this might also constitute a major topic to be included in UNIDO's activities, in the way of advising developing countries on what products they could produce by the establishment of guidelines for the use of residues, etc. In this context the need to develop new products making use of residues and marketable on the local market was stressed by several participants. One participant suggested that the accepted notion of the impossibility of exporting particleboard by developing countries should be studied carefully since trade was taking place in this product from developed to developing countries.

37. The need to integrate operations as a way to make adequate use of the raw material both in primary and secondary processing was stressed by several participants during the discussions.

38. The importance of the local market for the development of both primary and secondary processing was stressed during the meeting. It was said that the local market was essential for the promotion of commercially lesser known species, the sale of low quality timbers and the sale of products developed to make use of residues which otherwise would only be used for energy. On equipment the cautious attitude of the UNIDO document on primary processing was praised. It was pointed out in this respect that computerization and

automation should be looked at taking into account the real necessities of developing countries. The need of activities to help developing countries in the selection of machinery was stressed. Some participants highlighted the need only of adequate technology but that machinery should be produced locally. Specially in the case of ancillary material many countries are spending a lot of their scarce foreign exchange to import products which could easily be produced locally. The need of joint-ventures in this respect was pointed out.

39. On secondary processing it was said that the Consultation should not restrict itself to furniture given the fact that a much more important use of wood is wood in housing. In this respect there was agreement among participants that the use of wood in housing might be a way to cope with the increasing demand for housing in developing countries which cannot be satisfied by traditional materials. It was stated in this regard that developed countries should co-operate with developing countries to eradicate existing prejudices against the use of wood in houses and help them to improve the local production. The need to develop prefabrication methods and make them known to developing countries was stressed.

40. On training there was agreement that there is need of training on all levels and that the establishment of training facilities or training centres with joint government and industry funding might be a solution for this problem.

standardization

41. Quality and / were the matter of some controversy during the meeting whereas some participants considered that they are essential for export while relatively unimportant for the local market, other participants stated that quality control should start with the production for the local market since without an adequate quality control on the local market products would never enter foreign markets.

42. On the research and development it was said that one major area apart from the technical property of commercially less accepted species would be wood drying. It was also suggested that for the maintenance of the equipment the idea of servicing centres should be studied, the adequate maintenance of tools would help to increase efficiency on the factory level.

43. The need to strengthen and, where necessary, create local and regional trade and industry associations was stressed by participants as well as the need to expand their activities in areas like training, research, standardization, etc.

44. It was further stated that marketing poses a major problem, both for the local and for the international market and that assistance from the relevant UN organizations would be necessary in this field.

International co-operation, including new forms of mutually beneficial contractual arrangements and redeployment of productive facilities

45. A very brief introduction was made by the secretariat into this subject. It was stressed that the present situation of timber deficit countries with a large domestic market on one side and timber producing countries without capital and adequate labour to set up factories on the other side is leading to a situation in which both types of countries are finding mutually beneficial contractual arrangements, which while satisfying the wish of producing countries for increased local production through investment by the consumer countries in productive facilities, ensure to the importing countries the supply of wood in unprocessed or semi-processed form.

ANNEX I

LIST OF PARTICIPANTS

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ANNEX II

LIST OF DOCUMENTS

	<u>Document Number</u>	<u>Language</u>
Provisional Agenda	ID/WG.387/8	E/F/S
Provisional List of Participants	-	E
<u>Discussion papers</u>		
Shipping problems in the trade of tropical timber, by Peter Salgo, UNIDO Consultant	ID/WG.387/2	E/F/S
Overall view of the problems connected with the promotion of commercially less accepted species, by Oswin Peter Hansom, UNIDO Consultant	ID/WG.387/3	E/F/S
Development of primary processing in the wood and wood products industry of developing countries, by Gotthard P. Heilborn, UNIDO Consultant	ID/WG.387/4	E/F/S
Development of secondary processing in the wood and wood products industry of developing countries, by Horatio P. Brion, UNIDO Consultant	ID/WG.387/5	E/S
Management of Forest Resources in developing countries, FAO	ID/WG.387/6	E/F/S
Issues for possible consideration at the First Consultation	ID/WG.387/7	E/S
<u>Background papers</u>		
Report of the Regional Preparatory Meeting for Asia	ID/WG.371/16	E/F/S
Report of the Regional Preparatory Meeting for Africa	ID/WG.371/12	E/F/S
Report of the Regional Preparatory Meeting for Latin America	ID/WG.380/13	E/F/S
Regional Situation Paper: The wood and wood products industry of Asia, its current status (1981-1982) and future development, by Horatio P. Brion, UNIDO Consultant	ID/WG.387/1	E/F/S
Assessment of forest resources and wood processing industries in selected African countries, by Albert Mazel, UNIDO Consultant, + Addendum 1	ID/WG.373/1 + Add.1	E/F/S
Review of the wood and wood products industry in selected countries of Latin America, by Reinaldo Herrero Ponce, UNIDO Consultant	ID/WG.380/1	E/F/S

