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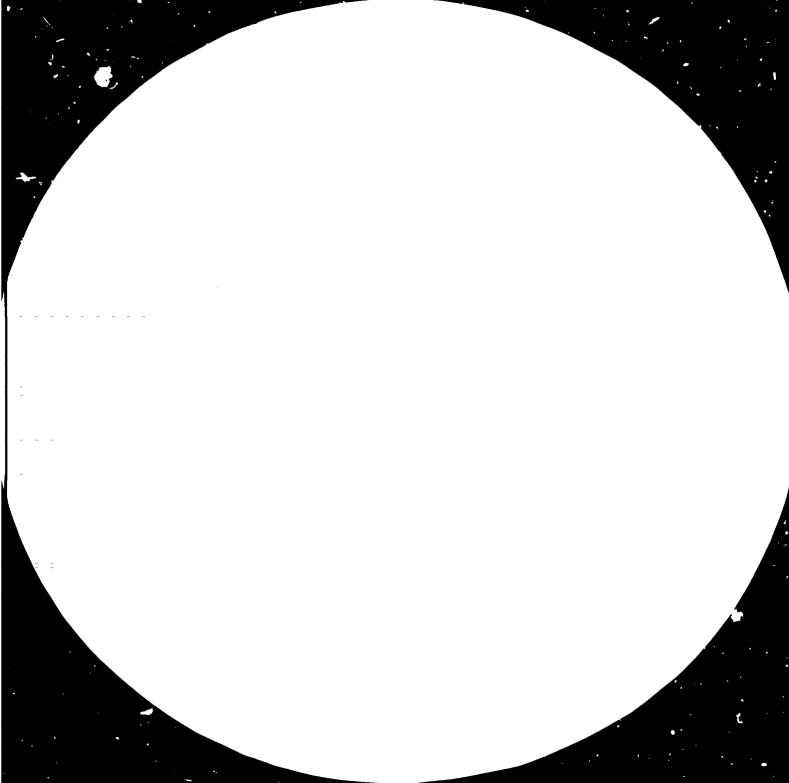
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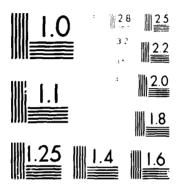
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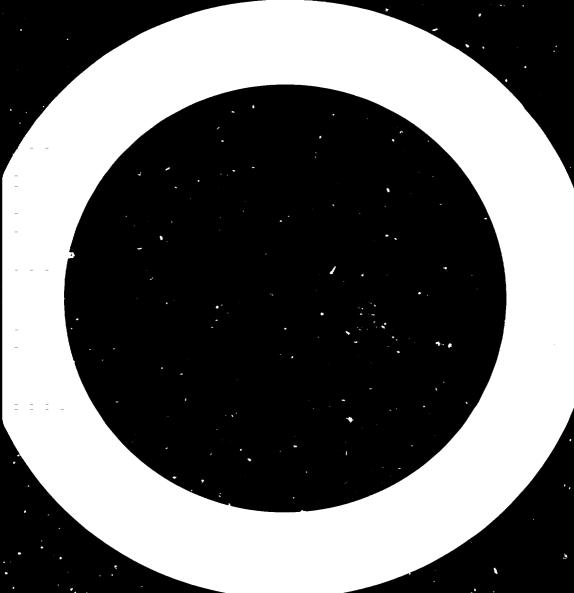
United Nations Industrial Development Organization

Global Freparatory Meeting for the First Consultation on the Wood and Wood Froducts Industry

Vienna, Austria, 24-26 January 1983

REPORT. (Meeting en wood products industry).

215



PREFACE

System of Consultations

The Second General Conference of the United Nations Industrial Development Organization (UNIDO), held at Lîma, 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. $\frac{1}{}$

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.

In May 1980 the Board established the System of Consultations on a permanent basis, and in May 1982 it adopted the rules of procedure $\frac{3}{}$ according to which the System of Consultations was to operate, including its principles, objectives and characteristics, notably:

The System of Consultations shall be an instrument through which the United Nations Industrial Development Organization (UNIDO) is to serve as a forum for developed and developing countries in their contacts and consultations directed towards the industrialization of developing countries; $\frac{h}{2}$ /

The System of Consultations would also permit negotiations among interested parties at their request, at the same time as or after consultations; $\frac{5}{2}$

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.

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3/ The System of Consultations (PI/84).

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- 4/ Ibid., para. 1.
- 5/ Ibid., para. 3.

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; \underline{O}

Each Consultation Meeting shall formulate a report, which shall include conclusions and recommendations agreed upon by consensus and also other significant views expressed during the discussion. $\underline{1}/$

First Consultation on the Wood and Wood Products Industry

The Industrial Development Board, at its fifteenth session in May 1981, $\frac{8}{}$ decided to include the First Consultation on the Wood and Wood Products Industry in the programme of consultations to be convened in 1982-1983. The First Consultation 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 (FAO) and the Executive Director of UNIDO have agreed that the two organizations will collaborate in the preparations for the First Consultation.

In order to identify priority issues to be submitted for consideration at the First Consultation, the UNIDO secretariat convened the Global Preparatory Meeting. Prior to that Meeting, activities had been undertaken at the regional level, including:

Preparation of regional papers on the wood and wood products industry in Africa, Asia and Latin America

Preparatory meetings for Africa, Asia and Latin America.

6/ <u>Ibid.</u>, para. 23.

7/ Ibid., para. 46.

8/ Official Records of the General Assembly, Thirty-sixth Session, Supplement No. 16 (A/36/16), para. 171.

CONTENTS

<u>P</u>	aragraphs	Page
AGREED CONCLUSIONS AND RECOMMENDATIONS	1-3	6
ter		
ORGANIZATION OF THE MEETING	4-9	7
SUMMARY OF DISCUSSIONS	10-51	9
Forest management policies	10-20	9
Promotion of commercially less-accepted species	21-30	11
Transport problems, especially those related		
	31-37	13
Development of primary and secondary processing	38-49	14
International co-operation	50-51	16
	AGREED CONCLUSIONS AND RECOMPENDATIONS	ORGANIZATION OF THE MEETING 4-9 SUMMARY OF DISCUSSIONS 10-51 Forest management policies 10-20 Promotion of commercially less-accepted species 21-30

ŧ

Annexes

Ι.	List of	participants	17
Π.	List of	documents	20

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AGREED CONCLUSIONS AND RECOMMENDATIONS

1. The Meeting recommended that the issues to be considered at the First Consultation should be:

(a) The development of primary and secondary wood-processing industries, including:

Supply of raw material Technology, choice and adaptation Integration of primary and secondary processing, including waste utilization Infrastructural requirements

Research and development in the above fields;

(b) Measures to promote the use of wood and wood products, including:

Promotion of commercially less accepted species Promotion of the use of timber in construction (including housing) Development of local markets Trade promotion measures, including marketing.

2. The UNIDO secretariat should prepare background documentation along the above lines.

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3. Time permitting, the UNIDO secretariat should also compile and present to the First Consultation a compendium of the various forms of international co-operation between developing and developed countries and between developing countries themselves in the sector.

I. ORGANIZATION OF THE MEETING

4. The Meeting was convened at Vienna from 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 ccuntries, representatives from inter-governmental, non-governmental and United Nations organizations, and by several observers (see annex I below).

Opening of the Meeting

5. The Meeting was opened by the Head of the Negotiations Branch of UNIDO, who explained the origin and scope of the System of Consultations. He 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 that of the five issues suggested by UNIDO, and others that might be proposed by the participants, only a limited number could be selected in order to allow time for a thorough discussion of each issue at the Consultation and agreement on conclusions and recommendations.

Adoption of the agenda

6. The following agenda was adopted:

- 1. Opening of the Meeting
- 2. Election of officers
- 3. Adoption of the agenda and organization of work
- 4. Selection of issues to be considered at the First Consultation
 (a) Discussion of issues suggested by the secretariat:
 - (i) Forest management policies in developing countries
 - (ii) Promotion of commercially less accepted species
 - (iii) Development of primary and secondary processing
 - (iv) Transport of problems, especially those related to shipping
 - (v) International co-operation, including new forms of mutually beneficial contractual arrangements and redeployment of productive facilties
 - (b) Discussion of other issues proposed by participants
- 5. Adoption of the report of the Meeting.

Election of officers

7. Makor Wehiong (United Republic of Cameroon) and Ralph. Roberts (Canada) were elected Chairman and Vice-Chairman respectively.

Documentation

8. The documents issued for the Meeting are listed in annex II below.

Adoption of the report

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

II. SUMMARY OF DISCUSSIONS

Forest management policies

10. The issue of forest management policies was introduced by the Chief of the Forest Resources Development Branch, FAO, on the basis of a document prepared by FAO and entitled "Management of Forest Resources in Developing Countries".

11. 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 10 times higher than that of reforestation and that a very small proportion was being subjected to intensive management.

12. There was agreement in the Meeting that it was essential to inventory the wood resources in developing countries in order to determine the quantity and quality of the resources available and thereby ensure their rational utilization. The need for adequate legislation was stressed on how inventories should be undertaken, how the forest should be logged, and how it should be treated once it has been logged.

13. It was noted that the ownership of forests ought to be looked into when that subject, which was directly related to the legislative aspect of forest management, was being dealt with. It was indicated that account had to 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.

14. It was agreed that there was need of further research into alternative logging methods, i.e. selective cutting versus clear cutting. Various participants expressed their views on reforestation or afforestation methods. It was stressed that plantations should be near the user. The use of fiscal incentives to promote plantations was suggested by one participant.

15. One narticinant mointed out that developing countries could share the experience obtained during recent years with the use of fast-growing species that are not only used for 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 were many areas that were not suitable for agriculture or cattle raising that might be utilized for forestry.

16. Regarding the fast-growing species one participant voiced the opinion that that would constitute the major raw material supply for the wood industry and

- 9 -

that a lot of research had still to be directed towards its possible uses. In that regard he stated that fast-growing species were generally used for a specific purpose only, but that recent research had shown that they could be used for mechanical and chemical processes, too. He stressed that international action on that point might give important results.

17. The concern was voiced that the wastes from cutting were 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 that waste.

18. Several participants stressed the need of adequate financing as one of the main limitations to the intensification of forest management. In that regard one participant recalled the experience of a joint-venture between a developed and a developing country in forest plantations. The developed country provided finance at very low interest rates, the principal being paid only when the forest became 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 producers and consumers.

19. 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 forest workers at all levels was pointed out by several participants. One participant indicated that logging had a very high rate of accidents in comparison with other activities, and that safety problems should be looked into by the competent United Nations agencies.

20. One participant stated the conviction that forest management must be the background theme for a 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. Supporting that view, another participant pointed out that current levels of consumption of hardwood were 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

21. The issue of the promotion of commercially less-accepted species was introduced by the Deputy Director of the Timber Research and Development Association (TRADA).

22. There was agreement between 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 were currently being used was said to be an indication of the lack of 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 that were known as primary.

23. Regarding promotional activities one participant pointed out that the European Economic Community some years ago had started promoting several unknown species. From his experience he underlined the paramount need of a common nomenclature of merchandizable species, indicating the damage that might be done to the marketing of a specific specie if its name were changed. On that point, however, another participant, although accepting the need of a common nomenclature, stressed that similar species grown in different environments could 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 were needed and that from the point of view of the consumer there existed the need for a continuous supply in adequate quantities for a reasonable period.

24. It was further stated that in order to promote commercially less-accepted species government action was needed in the reduction of export taxes, and a differential reduction of freight rates. Among other measures one participant suggested that the temporary export of logs be authorized.

25. There was a consensus that owing to the fact that many species with similar technical properties were available in small quantities, an adequate way of promoting their use was by grouping them. In that connection it was said that even though many institutions were dealing with the problem, a lot still had to be done. In that regard one participant stressed that in the case of grouping timber for use in construction according to strength, durability and shrinkage, the mixing of species posed problems related to wood preservation of certain species in the group that still had to be overcome.

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- 11 -

26. Several participants pointed out that one of the main uses of lesser known species was the local markets, especially in the secondary industry such as the use of wood in housing. Reference was made to existing programmes in developing countries, and to enlarging the domestic market through vast programmes of the promotion of the use of wood in housing.

27. It was stated that there was a lack of information on possible end-uses of commercially less-accepted species and on technical properties. Producing and consuming countries should jointly perform market studies regarding grades and end-uses of tropical timber. Also, there was a need for technical assistance by developed countries to help developing countries to develop new processing methods and new products.

28. One participant stressed that a lot of research would be needed in the preservation methods for commercially less-accepted species for their use in the local markets. A participant 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 owing to producers using machinery designed for well-known species. He concluded that in order to obtain adequate use of commercially less-accepted species was of first importance. 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 that knowledge to producing developing countries.

29. On the marketing of commercially less-accepted species one participant stressed again the need for grouping species in order to obtain volumes and quality of those species. In that 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, <u>inter alia</u>, the maintenance of high levels of quality, and the identification of new products.

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

- 12 -

Transport problems, especially those related to shipping

31. The issue of transport problems was introduced by a consultant from the United Kingdom of Great Britain and Northern Ireland.

32. The Meeting agreed that freight costs represented an extremely high percentage of f.o.b. prices and that there was a need to find cost-saving methods since reductions in freight costs reflected an increased revenue for producing countries. One participant held the view that high freight rates hampered the possibilities of exporting products with a higher valueadded.

33. On the high freight rates it was said that in the case of conference lines they bore no relation to the distance and the real cost of transport. However, it was pointed out that several problems existed in that connection, such as exclusivity agreements, obligation of using local shipping lines etc.

34. On the use of containers one participant said that several problems persisted. For example, the problem of humidity hal to be taken into account. Also, containers came back empty, which increased the cost of that type of transport. It had also to be borne in mind that many ports still lacked facilities for the handling of containers.

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

36. 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. Experience in Brazil was also discussed in that connection.

37. 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 stated that only problems of internal transport should be dealt with and that shipping should be discussed at a different forum. That view was partly sustained by a participant who said that 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.

Development of primary and secondary processing

38. The presentation of the issues of the development of primary and secondary processing was made by the consultants from the Federal Republic of Germany and the Philippines, respectively.

39. The participants agreed upon the need to support the initiatives by developing countries to develop primary and secondary processing, taking into account that such processing was based on local resources, was labour intensive, and the products were needed in all countries.

40. One of the major problems faced by the wood industry in developing countries was said to be the low recovery rates. Those were reported to be as low e; between 20 and 30 per cent for saw milling. How to increase that recovery was presented as one of the main problems to be dealt with at the First Consultation. Without going into detail, participants stressed that the training of labour and availability of adequate equipment were two important ways to resolve that problem.

41. The low recovery rates in developing countries as compared with developed countries raised the question of the use of residues. Some participants suggested that that should include residues from the forest and from processing. On the use of residues it was suggested that that might also constitute a major topic to be included in the programme of work of competent United Nations agencies in the way of advising developing countries of what they could produce by the establishment of guidelines for the use of residues etc. In that 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 that product was being traded from developed to developing countries.

42. The need to integrate, rationalize and concentrate operations to make adequate use of the raw material both in primary and secondary processing was stressed by several participants. In that connection one participant proposed for consideration the establishment of wood-processing centres that would be in a better position to make use of residues.

- 14 -

43. The importance of the local market for the development of both primary and secondary processing was stressed. 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 that 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 that respect that computerization and automation should be looked at taking into account the necessities of developing countries. The need for activities to help developing countries in the selection of machinery was stressed. Some participants highlighted the need not only for adequate technology but also that machinery should be produced locally. Especially in the case of ancillary material, many countries were spending a lot of their scarce foreign exchange on importing products that could easily be produced locally. The need for joint-ventures in that respect was pointed out.

44. On secondary processing it was said that the First Consultation should not restrict itself to furniture given the fact that a much more important use of wood was in housing. There was agreement by participants that the use of wood in housing might be a way to cope with the increased demand for housing in developing countries that could be satisfied by traditional materials. It was stated that developed countries should co-operate with developing countries to eradicate existing prejudices against the use of wood in housing and help them to improve local production. The need to develop prefabrication methods and make them known to developing countries was stressed.

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

46. Quality and standardization were a matter of some controversy during the Meeting; whereas some participants considered that they were essential for export while relatively unimportant for the local market, others stated that quality control should start with the production for the local market since without adequate quality control local market products would never enter foreign markets.

- 15 -

47. On 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 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 at the factory level

48. Some participants stressed the need to strengthen and, where necessary, create local and regional trade and industry associations as well as expand their activities in areas such as training, research and standardization.

49. It was stated that marketing posed a major problem, both for the local and for the international market and that assistance from the relevant United Nations organizations would be important.

International co-operation

50. A very brief introduction was made by the secretariat on the subject of international co-operation. It was stressed that the current situation of timber-deficit countries with a large domestic market and timberproducing countries without capital and adequate labour to set up factories was leading to a situation in which both types of countries were 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, ensured to the importing countries the supply of wood in unprocess. For semi-processed form.

51. The need for international co-operation in different fields, such as forest management, training of human resources, transfer and a base abien of technology and development of appropriate technology, was straight to

- 16 -

Annex I

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Annex II

LIST OF DOCUMENTS

Provisional agenda	ID/WG.387/8
Provisional list of participants	-
Discussion papers	

Shipping problems in the trade of tropical timber	ID/WG.387/2			
	10/ 10/ 10//2			
Overall view of the problems connected with the promotion of commercially less-accepted species	ID/WG.387/3			
Development of primary processing in the wood and wood products industry of developing countries	ID/WG.387/4			
Development of secondary processing in the wood and wood products industry of developing countries	ID/WG.387/5			
Management of forest resources in developing countries	ID/WG.387/6			
Issues for possible consideration at the First Consultation	ID/WG.387/7			
Background papers				
Report of the Regional Preparatory Meeting for Asia	ID/WG.371/16			
Assessment of forest resources and wood processing industries in selected African countries	ID/WG.373/1 and ID/WG.373/1/Add.1			
Report of the Regional Preparatory Meeting for Africa	ID/WG.373/12			
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Review of the wood and wood products industry in selected countries of Latin America	ID/WG.380/1			

