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EUROPEAN TIMBER TRENDS AND PROSPECTS

A STUDY

prepared jointly by the Secretariats of
the Food and Agriculture Organization of the United Nations
and the United Nations Economic Commission for Europe

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PREFACE

This *Study* of trends in European timber production, consumption and trade is the outgrowth of the work and experience of the Timber Committee of the Economic Commission for Europe, which is jointly serviced by the Secretariats of the Commission and the Food and Agriculture Organization of the United Nations. In the autumn of 1947, when this Committee was first established, its purpose was to help European Governments to overcome through concerted action the acute timber shortage which was hampering European reconstruction. It continued the informal agreements among importing countries on purchasing limits inaugurated by the Timber Committee of the E.E.C.E., the immediate predecessor of the present Committee. It sponsored timber equipment loans granted by the International Bank for Reconstruction and Development to several European wood-exporting countries. It met frequently to make forward estimates about prospective requirements and contributed in various other ways towards the comparatively rapid post-war recovery of European wood production. Despite the temporary disappearance of the Soviet Union as a large source of sawn softwood imports, and without aggravating Europe's dollar deficit through continuous heavy imports of North-American timber, it thus became possible to meet the bulk of Europe's timber requirements.

In this first phase, the task of the Timber Committee had the advantage of being clearly defined by the existence of an acute and unmistakable timber shortage, which the International Timber Conference held in May 1947 at Mariánské-Lazně had thoroughly explored. However, as the situation improved—to a modest extent also due to the efforts of the Timber Committee—the focus of the Committee's work was shifted. In particular, the question had to be raised whether the achievement and maintenance of equilibrium between demand and supply continued to require international collaboration and action, or whether in future a reasonable balance was likely to be achieved automatically. The temporary equilibrium reached around 1949 was precarious and obviously unstable, and war restrictions on the consumption of timber and paper were still in force in some of the most important consuming countries. But was Europe still faced with a timber shortage or not? How would supply and demand of forest products develop over a longer span of years?

The present *Study* was undertaken primarily in order to find answers to these questions. Since it was started, in the summer of 1950, the speculative raw materials boom that followed the outbreak of the Korean War has come and gone. While this boom lasted, the existence of an acute European timber and paper shortage appeared to be beyond doubt. Now that the boom is over, the doubts about the existence of a long-term shortage of forest products are greater than ever. Several programmes for new pulp and fibre-board capacity have recently been cancelled and fears are even being expressed of possible surpluses in these and other forest products.

This *Study* should help governments and individuals to appraise these problems more accurately than in the past. It attempts to assemble material which, because it is scattered here and there and obviously incomplete and difficult to compare both in terms of time and space, had not been brought together before. The *Study* has suffered, of course, from inevitable shortcomings in the basic material. But it has nevertheless produced data which are now for the first time made available; and, by covering a period of sufficient length, it makes it possible to determine the nature and direction of certain basic trends which are operating, irrespective of short-term fluctuations.

The *Study* tries to be comprehensive by drawing on all available material; it addresses itself primarily to questions with which industries and governments are actually faced; and it carries the analyses to the limit permitted by the available material thus providing essential knowledge, about orders of magnitude and trends in production, consumption and trade, of relevance for policy decisions.