



NATIONS UNIES
COMMISSION ÉCONOMIQUE
POUR L'EUROPE

ОБЪЕДИНЕННЫЕ НАЦИИ
ЭКОНОМИЧЕСКАЯ КОМИССИЯ
ДЛЯ ЕВРОПЫ

UNITED NATIONS
ECONOMIC COMMISSION
FOR EUROPE

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Palais des Nations
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27 July 2012

To: Heads of Timber Committee delegations

Dear Head of Delegation,

Subject: Country market statements for annual Timber Committee Market Discussions

You are invited to submit a written country market statement to be considered as part of the UNECE Timber Committee (TC) Market Discussions, which will be held this year in Geneva on 16-17 October 2012.

This year's theme is, "Sustainable Forest Products," which will also be the theme of the soon-to-be-published *UNECE/FAO Forest Products Annual Market Review, 2011-2012*. It would be most helpful if you could keep this theme in mind when drafting your market statement.

Country market statements contribute greatly to the success of the Market Discussions. To help in the preparation of market statements, I have included a recommended format at Annex 1. Annex 2 lists people and organizations that may be able to help with information for the market statements.

Please e-mail your market statement to info.ECE-FAOforests@unece.org to reach us **not later than 14 September 2012**. This will allow us to post the statements on the website so that delegates can read them before the Market Discussions. Statements may be submitted in any of the official UNECE languages: English, French or Russian.

Thank you in advance for taking part in the 2012 Market Discussions and for preparing your market statement and forecast. I look forward to seeing you in Geneva.

Yours sincerely

A handwritten signature in black ink that reads "Matthew A. Fonseca".

Matthew Fonseca
UNECE/FAO Forestry and Timber Section
Trade and Sustainable Land Management Division

Annex 1

REQUESTED FORMAT FOR COUNTRY MARKET STATEMENTS

Written market statements have tended to follow the format of the Forest Products Annual Market Review. For further information on the organisation of the discussions, please refer to, “Market developments in 2012 and Prospects for 2013” (ECE/TIM/2012/3), which you will find with other relevant documents at: <http://www.unece.org/forests/tc2012>

It would be helpful if your statement covered the following subjects and that it reviews developments in 2012 as well as looking ahead to how you think markets might develop in 2013.

1. General economic trends affecting the forest and forest industries sector (brief description)
2. Policy measures taken in your country over the past 18 months, which might have a bearing on trade and markets of forest products or forest management. The UNECE/FAO *Forest Products Annual Market Review, 2011-2012* is a background document for the Market Discussions (see <http://www.unece.org/fpamr2012>). It discusses the following policy measures, which you too may wish to address in your report:
 - Economic stimulus policies and forest products markets
 - Climate change and forest-related markets;
 - Trade policy issues affecting markets;
 - Russian forest sector reform and domestic and export market effects; and,
 - Research and development policies.
3. Market drivers – including construction trends, Eurozone crisis, extra-regional consumption of forest products, targeted incentives for green building, renewable energy and so on. How these market drivers are affecting the market for forest products in your country, whether good or bad.
4. Developments in forest products markets sectors (major emphasis)
 - a. Wood raw materials (e.g. roundwood: sawlogs, pulpwood and fuelwood)
 - b. Wood energy, with a focus on government policies promoting wood energy
 - c. Certified forest products
 - d. Value-added wood products
 - e. Sawn softwood
 - f. Sawn hardwood (temperate and tropical)
 - g. Wood-based panels (particle board, fibreboard and MDF, OSB, plywood)
 - h. Pulp and paper
 - i. Carbon markets in the forest sector (if there is anything to report)
 - j. Innovative wood products
5. Tables
 - a. Economic indicators
 - b. Forest products production and trade in 2011, 2012 and 2013 (this is the Timber Committee forecast questionnaire and will be mailed separately).

The market statements for last year are at: <http://www.unece.org/market-statements-2011.html#c26404> and these could be useful as a model for your statement.

Annex 2

COLLABORATION IN PRODUCING MARKET STATEMENTS

The lead responsibility for preparing and submitting the country market statement lies normally with the head of delegation to the TC. In 2007, the Market Discussions were held jointly with the International Softwood Conference (ISC). Since then we have encouraged countries to call on people working in the industry for help in preparing softwood market statements and forecasts. The attached list gives some suggestions about who might be approached. We cannot guarantee that the list is up to date but it is the best information we have currently. You might find it helpful to contact the secretary of the European Softwood Association (UCBR) Mr. André de Boer, Vereniging Van Nederlandse Houtondernemingen, Netherlands at info@vvnh.nl. or the European Organisation of the Sawmill Industries eos@cei-bois.org or via http://eos-oes.eu/site/index.php?option=com_content&task=view&id=30&Itemid=29

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