

木材 消費量 調査

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Principal Conclusions of Timber Consumption Survey

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Summary

Recommendation

These are the highlights of the findings of the Timber Consumption Survey carried out by the Project in 1966, and covering consumption for the period from 1961 to 1965. The survey was oriented towards consumption for structural, commercial and industrial purposes and existing estimates for local (village-level) consumption as fuel and the like were adopted. A full report on the survey was submitted to the Bureau of Forestry in 1966.

Long-term Trends

After allowance for anticipated population increase, this ten year's increase in industrial wood consumption represents a gain of about 30% in per capita consumption (from 0.0913 cu.m. per capita to 0.118 cu.m. per capita). This is only about half the expected general economic growth of about 75% (7% per annum). It is therefore likely (a) that the 1975 estimate is conservative, (b) that the consumption demand beyond 1975 may be expected to build up at a greatly increased rate. Estimated income elasticity coefficients are high, and with expected increases in prosperity and population, the consumption is expected to rise to 10 million cu. meters by the year 2,000.

Consumption Pattern

The breakdown of industrial consumption (1965) is given in Table 4-2, showing sawnwood consumption as the most important in 1965.

The upward trend in all sectors over the 1961-65 period is expected to continue. The general consumption pattern is expected to change through 1975 with a sharp increase in the relative importance of pulp products (to 30% of total consumption) offset by declining relative importance of sawlogs.

The following recommendations follow from the study:

- (i) Industrial forests. — A programme of establishment of consolidated industrial forests should be in-

initiated as a matter of urgency.

- (ii) Fuelwood forests – Properly sited, protected and managed fuelwood forest, worked on a 20-year rotation, should be established as a nation wide basis.
- (iii) Hardwood utilization – Detailed investigations are required into the use of indigenous hardwoods for the pulp, particle board and hardboard industries.
- (iv) Mining timber – Preservation treatment of all mining timber should be enforced by law.
- (v) Sawmills –
 - a. Licencing restrictions should be enforced to reduce the number of small, inefficient sawmills.
 - b. Extension work should be undertaken by government to improve sawmilling practices. ■