



Growing opportunity
Employment openings
abound in forestry



Waste not
The process of using
the whole tree

**MEDIA
PLANET**

June 2011

THE FOREST INDUSTRY



3

FACTS

YOU SHOULD
KNOW ABOUT
THE FOREST
INDUSTRY

RESTRUCTURED, RECONSIDERED, REDEFINED

“Dirty Jobs” host Mike Rowe explains why it’s time to rethink
the way we look at the forest industry.

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CHALLENGES



Canada’s **forest sector** is looked to as an international leader in sustainable forest management, possessing more **third party certified forest land** than any other country in the world.

The future of the forest industry: leaner, greener and more innovative

A dramatic storyline draws the eye. And the recent narrative about the worst recession of a generation and stumbling recovery has certainly riveted our attention.

But feeble markets haven’t been telling the real underlying business story—the plot hinges not on what markets are doing, but on how business adapts to what markets are doing. The heroes at the end of this story will be those who adapt the quickest and smartest to structural market changes, not those who get lucky in good markets and beaten down in bad.

From this perspective Canada’s forest sector appears poised to emerge from the troubled economic times in a heroic fashion. Rather than simply gritting its teeth and waiting for better times, the industry has instead been retooling itself into a leaner, greener and more innovative sector, one ready to become an increasingly dynamic player in the global marketplace of the 21st century.

Building efficiency

The industry transformation has followed different paths in different companies but it has basically embraced four

approaches.

The first is obvious—the necessary step of improving productivity and cost efficiencies. Companies have worked as teams finding creative solutions and streamlining their operations. Our sector consistently outperforms the overall economy in productivity growth and our sawmills outperform their U.S. counterparts.

Second is the push to diversify markets. Instead of waiting for the U.S. market to return, companies have been boldly expanding their reach to the world, especially in Asia. The forest products industry is now Canada’s number one exporter to both China and India.

Third, forest companies have been translating their superior environmental performance into reputational capital. Canada’s pulp and paper mills have reduced their greenhouse gas emissions by 60 percent since 1990. Canada has more third-party certified forest land than any other country in the world. And one year ago, 21 forest companies belonging to the Forest Products Association of Canada (FPAC) joined leading environmental groups to sign the landmark Canadian Boreal Forest Agreement. Far from resting on its laurels, the industry is committed to keep raising the environmental performance bar



Avrim Lazar
President & CEO,
Forest Products Association of Canada

“...Canada’s forest sector appears poised to emerge from the troubled economic times in a heroic fashion.”

and to seek market advantage over competitors who are slower to act.

Waste not

The final game changer comes from innovation and the ability to extract more value from every tree in the form of bio-fuels, bio-materials and bio-chemicals that can be used in everything from airplane parts to plastic resins to pharmaceuticals. These add-on products would supplement the existing lumber, pulp and paper operations. A recent study published by FPAC identified a vast global market opportunity for such products of \$200 billion by 2015.

There will be no lack of drama in tomorrow’s forest industry. The business world is never easy and global competition is always fierce. But new efficiencies, expanding markets, green credentials and innovative new products will position Canada well. The forest industry story will no longer be about the struggle to survive but instead about its ability to thrive in the years ahead. The new narrative is about an industry primed to create new wealth for the economy, help us reach our environmental goals, create solid jobs and shore up rural communities.

The measures behind responsible forestry

If you need proof that forests are the heart and soul of British Columbia, take a look at the province’s forest certification record.

British Columbia has more lands that meet third-party sustainable forest management certification standards than any other jurisdiction on earth. In fact, in the 1990’s, British Columbia became the first province in Canada to have a certified forest and now more than 50 million hectares are certified to one of three internationally recognized and accepted standards used in BC: the Canadian Standards Association, the Sustainable Forestry Initiative® (SFI®) and the Forest Stewardship Council. SFI Inc. manages the largest single forest certification standard in the world—and more than a quarter of SFI forest certifications are right here in British Colum-

bia. Credible certification programs are anchored by a rigorous forest standard with measures to protect water quality, biodiversity, wildlife habitat and species at risk, and more—and an independent audit confirms these requirements are being met before a certificate is awarded.

Forest companies and land managers in BC and the rest of Canada have shown leadership in forest certification and they’ve also embraced conservation initiatives. At SFI, conservation and community are embedded in the program through regional grassroots committees, Habitat for Humanity projects, as well as conservation work with organizations like Nature Trust of BC, Ducks Unlimited Canada and more. Aboriginal communities are also seeing the value in forest certification and the past year alone, a number of communities have become SFI certified, inclu-



“Credible certification programs are anchored by a rigorous forest standard with measures to protect water quality, biodiversity, wildlife habitat and species at risk...”

Kathy Abusow
President and CEO,
Sustainable Forestry Initiative

ding those in BC, Ontario and Washington State.

Home-harvested pride

Communities across British Columbia have a lot to be proud of. Wood and paper products from their local forests are on store shelves and in homes around the world; so too are products bearing forest certification labels like the SFI label which signifies

responsible forestry. It is clear that buyers and land managers who care about forests appreciate the value of certification, but forest certification is a lot more than an on-product label. It can draw on the amazing enthusiasm, the knowledge and the resources available to us to address a bigger picture that is based on integrity and achieves positive results for forests and communities.



WE RECOMMEND



Building with wood
Why this construction material continues to be a top pick.

PAGE 7

“Wood is undoubtedly the preferred building material for residential construction.”

Panel of Experts
What are the challenges facing the timber industry? **p. 6**

A strong contender
Cross Laminated Timber shows its strength as a building material. **p. 7**

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Responsible for this issue:
Publisher: Jon Kent
jon.kent@mediaplanet.com
Designer: Penelope Graham
penelope.graham@mediaplanet.com
Contributors: Kathy Abusow, Bill W. Bourgeois, Michael Bradley, Mike Evans, Sharon Glover, Avrim Lazar, Elianna Lev, David Lewis, Mike Rowe, Council of Forest Industries

Managing Director: Justin Guttman
justin.guttman@mediaplanet.com
Editorial Manager: Jackie McDermott
jackie.mcdermott@mediaplanet.com
Business Developer: Joshua Nagel
joshua.nagel@mediaplanet.com

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DID YOU KNOW?



Wood and paper products are great environmental choices as long as they come from forests that are managed responsibly. What can you do to support sustainable forest management?

Respectable roots

1 Start by looking for products with labels showing they are third-party certified. This means wood and paper products are from forests where harvests are sustainable—habitat, water quality and biodiversity protected, communities respected, and a lot more.

Push your providers

2 Encourage retailers to stock building products or paper from certified sources by letting them know this is your preferred choice.

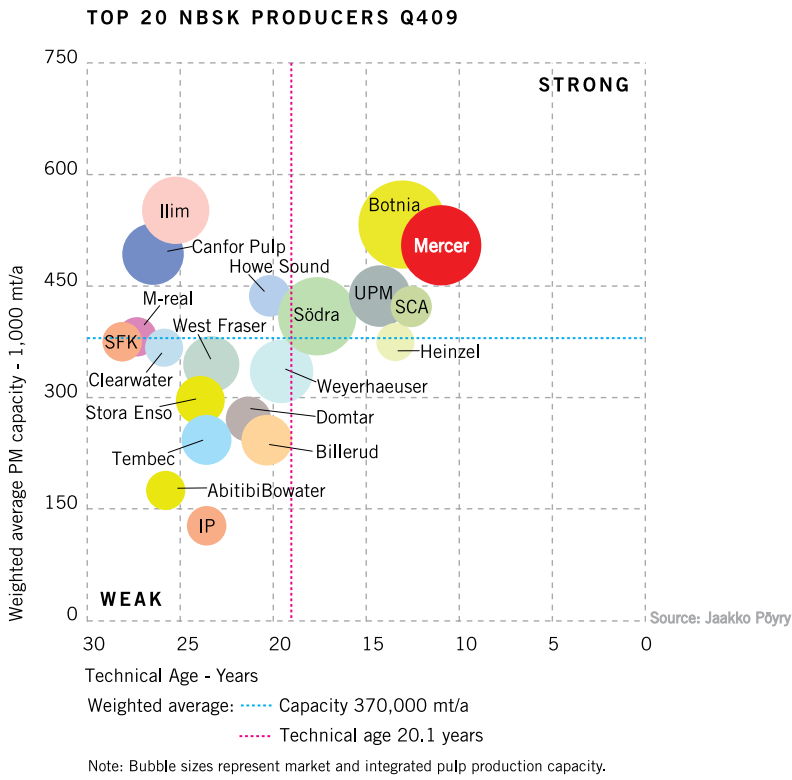
Reach beyond the R’s

3 Recycled paper is an excellent choice but it will never meet all of our paper needs. Complete the equation by looking for certified paper products.



Mercer International: On the leading edge of an Industry Transformation

Flash back to the late 1990’s and early part of the 2000’s, and the BC Pulp and Paper sector appeared to be in major decline with multiple mill closures and its most modern mills struggling under a burden of debt. Meanwhile a small Vancouver based company—Mercer International—was going against the trend with a new business model focused on not just pulp but energy and efficiency. In 2000 it had just completed a brownfield project, building Germany’s first Kraft pulp mill. The mill was a huge success and building on this, Mercer began a €1 billion green field project to construct a second mill in Germany - Stendal. Becoming operational in late 2004, Stendal became the newest and largest Kraft pulp mill in the world and created the foundation for thousands of forestry industry jobs where none existed



before. In addition, these two Mercer mills became the largest and second largest producers of bionergy in Germany. In early 2005, with the acquisition of the Celgar mill in Castlegar BC, Mercer became one of the largest NBSK market

pulp producers in the world with a current capacity of nearly 1.5 million tonnes per year. Mercer’s CEO Jimmy Lee stated, “We saw a lot of potential in Celgar, having been built in 1993 it was Canada’s largest and most modern single line kraft pulp mill. In the last 6 years Celgar has undergone significant investments and transformation.” We believe the transformation has resulted in Celgar having the lowest carbon footprint of any NBSK pulp mill in Canada, increased pulp production and a doubling of its green energy capacity, making it one of Canada’s largest bioenergy producers. For perspective, if the rest of the BC Pulp and Paper sector was producing NBSK pulp and bioenergy as efficiently as Celgar, we believe an extra 10,000 GWh - or enough to power nearly 1 million BC homes - could be produced, all without consuming any more

wood. While Celgar does not own any forest land or tenure, it promotes sustainable forest management by only purchasing wood from sources certified by internationally recognized certification standards. Operating some of the most modern and technically advanced facilities in the world translates into highly efficient operations with state-of-the-art environmental compliance. Quoting Mercer’s Executive Vice President and CFO David Gandossi: “I am very excited about our future. The NBSK pulp supply/demand fundamentals currently appear favorable with the closure of large amounts of high cost capacity during the crisis of 2009 and the increasing robust demand from developing markets like China.” For more information about Mercer International please go to their website www.mercerint.com.

M E R C E R Provider of fiber, renewable energy and chemicals, from sustainable sources, for essential human needs.

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IT’S ONE THING TO SAY YOU’RE COMMITTED TO SUSTAINABILITY.

IT’S ANOTHER THING TO GET THE EXPERTS TO AGREE.

Kruger Products is the first and only Canadian tissue manufacturer to earn the Forest Stewardship Council’s® Chain of Custody certification. It’s your assurance of responsible production and consumption, from forest to product to shelf. And it comes from the leading global authority on responsible forest management. The certification is just one part of our Sustainability 2015 initiative. Learn more about it at sustainability2015.ca

INSPIRATION

Though he’s best known for showcasing the grossest gigs out there, **Mike Rowe, host and executive producer of “Dirty Jobs”** is an advocate for the trades industry—and closing the skills gap.

FACT

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IN 2010, BC EXPORTED 38% OF ITS LOGS TO JAPAN, MORE THAN ANY OTHER COUNTRY

Good, clean hard work

LEADER TO LEADER

■ **Mike, so many of us know you from “Dirty Jobs”—tell us how you got to where you are in terms of being an advocate for industry and trades!**

I guess my appreciation for the trades began when I was a kid. I had one of those grandfathers who lived next door and could build or fix pretty much anything. To me, the guy was a magician, and his talent was legendary in the community. I wanted very much to follow in his footsteps. Sadly, I didn’t get the gene, which is why my fondness for skilled labor is limited to an appreciation, and not so much a literal pursuit. “Dirty Jobs” was meant to be a tribute to guys like my granddad, people who take the time to learn a skill and master a trade. People who wake up clean and come home dirty.

■ **Tell us about “mikeroweWORKS” and your foundation. What message are they spreading?**

Fundamentally, “mikeroweWORKS” is a PR campaign for hard work and skilled labor. As much as I’d like to take credit for implementing a long-term plan, I’m afraid my actual strategy was a lot less deliberate. As “Dirty Jobs” became more and more successful, I began to look for ways to call attention to some of the challenges facing many of the industries we often feature on the show. The “skills gap” was something I kept hea-

ring about, but didn’t really understand until I started talking with some CEO’s at some very big companies who were struggling to fill certain skilled labor positions. Given the rising unemployment rate, I thought this corresponding labor shortage was a fascinating phenomenon. With the help of “Dirty Jobs” fans, I launched an online trade resource center—a place where kids and parents might investigate some of these careers. My hope for mikeroweWORKS is that it might, in a modest way, help close the skills gap. As for the mrW Foundation, that’s concerned mostly with scholarships and tool stipends for kids who are willing to learn a skill and master a trade.

■ **Why do you think the skills gap exists today? Why has our relationship with hard work changed?**

That’s probably a bit beyond my pay grade. But I guess if I were to impersonate a social anthropologist, I’d probably say we’ve changed the meaning of a “good job”. On a broad social level, we’ve redefined success into something that no longer looks like work. We’ve positioned skilled labor as a kind of vocational consolation prize—an “alternative” to a four-year degree. I suspect the skills gap is really just a reflection of what we value, and another sad consequence of pushing a college over all other forms of knowledge, training, and education. The skills gap isn’t all that mysterious. It’s inevitable.

■ **Trades, and specifically forestry, possess amazing career possibilities for young people. What would you say to anyone considering this type of career?**

I’d say go for it. Things have changed quickly for a lot of people—in fact, entire industries have vanished in the last few decades. Yours has not. Forestry has certainly evolved, but it’s not going anywhere. Nothing is guaranteed of course, but I personally find comfort in the fact that some industries are probably here to stay. We still need wood, and I bet we always will.

■ **Forestry, when practiced properly, is an incredibly sustainable industry and safety standards are increasing every year. Do you think it’s time for people to change their opinions about the industry?**

I do. But no one ever changes their opinion just because it’s time to do so. They have to want to. And the key to persuading people to think differently about Forestry is to reconnect them to the industry in a personal way. Anyone who lives in a wooden home and uses wooden furniture is a part of Forestry. Anyone who likes to relax by the fire and read a book has benefited from your industry. Anyone who uses toilet paper owes the lumberjack a debt of gratitude. It’s not enough to promote your industry by talking about the many available opportunities—you need show the rest of us where we’d be without you. Pe-



INDUSTRY ADVOCATE
Mike Rowe admires the skill it takes to work in the forest industry.
PHOTO: AMANDA MARSALIS

ople need to get their head around the idea that a failure to reinvigorate the skilled trades, including Forestry, is not just a threat to those working in the industry—it’s a threat to those who benefit from your efforts. It’s

not the workers in danger of tumbling into the skills gap—it’s the rest of us.

For more information on and online resources for the trades industry, visit www.mikeroweworks.com.



Howe Sound Pulp and Paper Corporation: Community Roots for a Century

Since 1908, there has been a wood-fibre pulp mill at Port Mellon on the Sunshine Coast. Howe Sound Pulp & Paper is not only British Columbia’s oldest mill, but it also produced the first sheet of paper made from wood fiber in the Province.

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gigawatt hours of electricity every year. A refurbished boiler will enable us to operate our generators at a higher capacity using 100 % biomass fuel, resulting in the generation and sale of 400 gigawatt hours per year of clean electricity. BC Hydro will purchase all of the electricity produced as a result of the boiler upgrade—enough power for about 36,000 homes.

One of the largest employers on the Sunshine Coast, HSPP has 480 skilled employees. In order to produce our products, we require a considerable diversity

of skills which include the people who manufacture our products, medically trained staff, tradespeople, engineers, accountants, systems technologists, office administrators, biologists – every kind of job, and they all contribute to our success. Our setting provides employees with an outstanding quality of life, complemented by an excellent wage and benefit package.

If you’re interested in an exciting, challenging and rewarding career, please contact us at: employment_coordinator@hspp.ca.



Pinnacle Renewable Energy Group is North America’s leading producer of solid renewable fuel in the form of wood pellets. With six production facilities in British Columbia producing in excess of 1 million tonnes of product, Pinnacle provides sustainable employment and an economic benefit to forestry based communities. Pinnacle utilizes trees affected by the mountain pine beetle as well as byproducts of the lumber manufacturing and timber harvesting process to manufacture an easily transportable renewable fuel. This renewable fuel is used domestically for home, greenhouse and commercial heating applications and in Europe and Asia to displace large scale coal consumption.

For more information, please contact: Vaughan Bassett, Vice President Sales & Logistics
Tel: 250-562-5562 ext.202 | Website: www.pinnaclepellet.com



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Save money

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THE FOREST PRODUCTS CHAIN

Wood, pulp and biomass energy flows

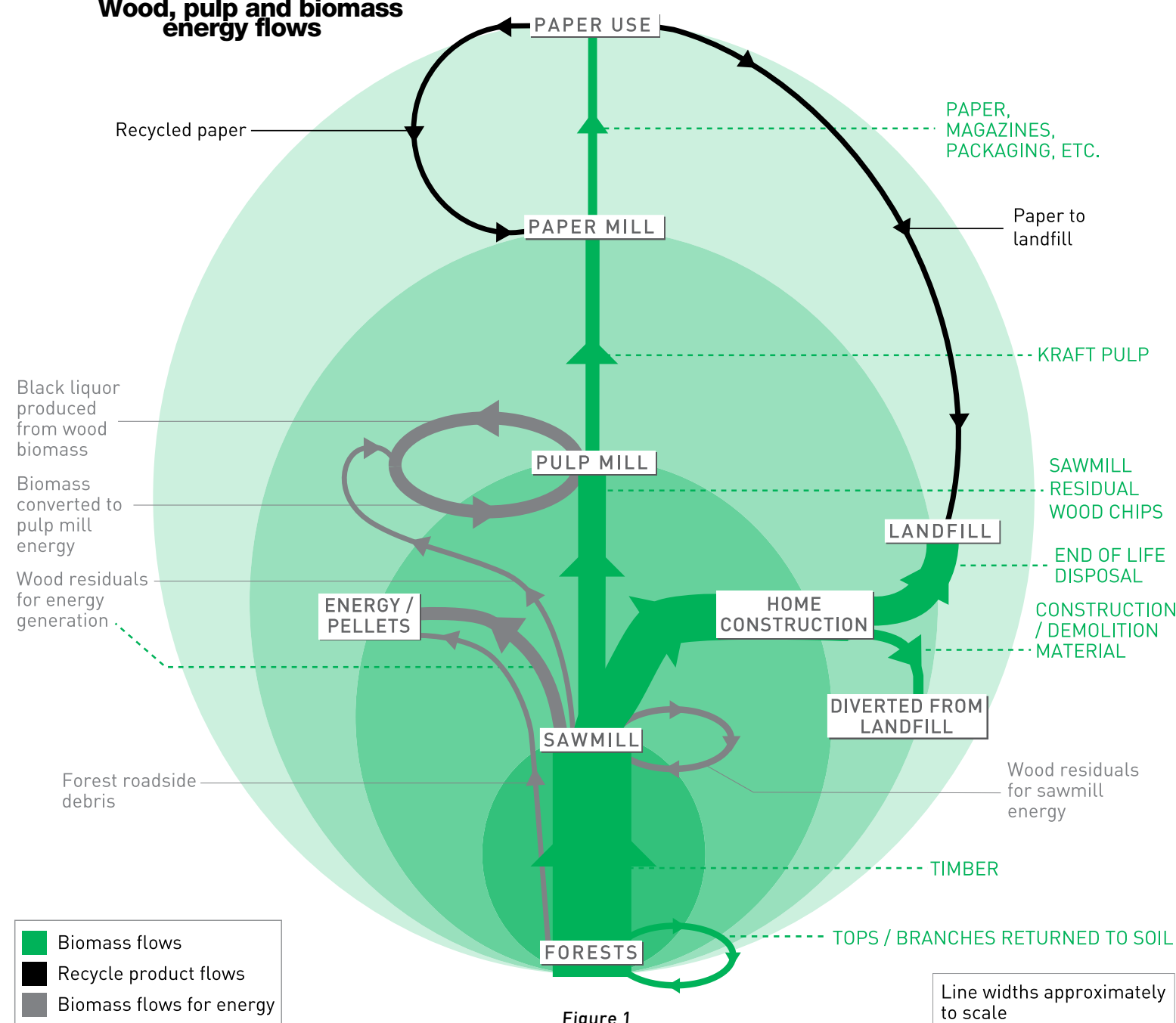


Figure 1

Courtesy of Canfor Pulp Products Inc.
Sustainability Supplement 2010



THE PICK OF PLANKS
Dimensional lumber is only one of many products the industry produces.

PHOTO: COUNCIL OF FOREST INDUSTRIES



DON'T MISS!



Michael Bradley
Director,
Sustainable
Enterprise
Canfor Pulp Ltd.
Partnership

The forest products chain—an eco-efficient process

The forest products chain is an extremely eco-efficient process.

Virtually all of the material harvested from the forest is used and/or reused after its primary use. Branches and needles, the most valuable parts of the tree for their nutrient value, are returned to the forest soil; bark and other wood residuals are efficiently combusted to make electricity or processed into wood pellets for energy systems; logs are sawn into lumber; and the wood chips and other residual material from that process are used to produce not only pulp and paper but also the very energy that drives the pulp production process.

There still remain opportunities for improvement of course, for example the construction and demolition stages for solid wood when buildings are demolished and the end of life for paper. Land-filling of wood or paper produces a significant amount of carbon dioxide or the even more potent greenhouse gas, methane. The forest products industry fully supports efforts to increase recycling efforts of wood and paper products.

MICHAEL BRADLEY

Director,
Sustainable Enterprise
Canfor Pulp Ltd. Partnership



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PANEL OF EXPERTS

| | | | | | | |
|---|--|---|---|--|---|---|
|  | Bill W. Bourgeois PhD, RPF President, New Direction Resource Management Ltd |  | David Lewis, RPF Executive Director, Truck Loggers Association |  | Council of Forest Industries The voice of the British Columbia Interior forest industry |  |
| Question 1: How important has the emergence of Asian markets been for the BC and Canadian forest industry? | The emergence of the Asian markets at a time when the US market is depressed has encouraged diversification of customers, at least for the short term. Whether this situation continues when the US market rebounds is a question yet to be answered. The industry has tended to be conventional through previous tough times and resorts back to where they have the greatest knowledge. It is easier for companies to work with the US due to language, customs and proximity. Historically it has been tough to establish and maintain markets in Asia. Will the industry be willing to dedicate the resources over many years to this market to ensure its maintenance when the BC Government reduces its current contributions? | | | The Asian market has been extremely valuable to the BC industry as it has replaced the embattled US housing market as a primary demand driver for commodity product. While prices in general, continue to languish and margins are still very thin within the coastal industry, there are certain timber grades and species that are providing a considerable export premium over domestic prices. This has allowed coastal producers to access timber that would otherwise have been uneconomic which has created employment and spurred the coastal economy. Log exports are creating jobs right now. | | |
| Question 2: The mountain pine beetle has posed numerous challenges to the industry. Where are we now and how do we proceed? | The economics of harvesting and manufacturing MPB wood is delicate and will become more challenging when the transportation costs increase as the harvest sites move away from the mills. The mid-term timber supply has been identified as a major issue and focus by the industry and government. However, this strategy is based on the current industry configuration but just less capacity. Little resources are being directed towards a more diversified industry, other than bio-energy, that could result in more value realized by the MPB killed trees. Without development of a diversification strategy, the result will be a smaller commodity producing industry in the areas hard hit by the epidemic. This would be unfortunate for the communities and their families. | | | I am not an expert when it comes to the pine beetle and its impacts by any means, but what I can say is that we have only begun to see the negative impacts that will affect us all over the next 40 to 50 years. Environmental consequences such as forest fires and hydrological changes, as well as social changes such as demographic and economic shifts will have a negative impact on all of us in the province regardless of where we live. It is critical that we do as much as we can now to set the table for our future forests. | | |
| Question 3: Where is the industry going to be in 10 years? | In spite of all the talk from the forest industry regarding bio-products, the industry will be much the same as it is today unless the government creates incentives or opportunities for current non-forest industry players to bring innovative ideas to the sector. The industry is very conservative and focused on the products or derivatives of these they have produced for decades. The structure and incentives related to the forest industry do not encourage the required innovation needed to change the Sector to meet the 21st century challenges. “New blood” is essential and Government has to stop looking to the current industry for guidance regarding what to do. | | | The answer to that question will depend on how we have dealt with the key threats to our industry. We have seen the industry dwindle over the past 20 years as uncertainty has crippled long term investment into the coastal industry. Critical supply chain inputs such as labour, capital, equipment supply and entrepreneurial involvement will be the limiting factors in our growth looking ahead so the manner in which we address these threats will be critical to our future success or failure. | | |
| | | | | The forest industry will continue to recover and transform itself incrementally over the decade. The impact of Mountain Pine Beetle, new uses for previously waste fibre, external markets (U.S. and Asia) and the exchange rate will be key drivers of this transformation. Increasing amounts of MPB killed timber will be available for pulp mills and new bioenergy applications. The solid wood / saw-mill sector will continue to be the back bone of the industry but future sawlog timber supply will be tighter. Lumber prices will spike from time to time. Increasing amounts of previously waste fibre will become economically viable. <small>John Allan, President and CEO</small> | | |

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