

SECTOR SNAPSHOT: FORESTRY

UNIQUE COMPETITIVE ATTRIBUTES:

- World leader in production and export of softwood lumber
- Strategic Pacific Gateway location and excellent transportation infrastructure: roads, rail, Vancouver International Airport, Port Metro Vancouver and the Port of Prince Rupert (3 day advantage) are the closest gateways to Asia from North America
- Public ownership of huge tracts of productive forests
- Long-term business relationships in premium markets with history of excellent fibre

OTHER COMPETITIVE ADVANTAGES:

- ✓ Recognized leader in forest management and # 1 in the world in area of third-party certified forests
- ✓ Established industry with Forestry Innovation Investment as a leading edge model integrating forest market development planning and program delivery between industry and government
- ✓ Extensive and globally recognized forest products research network

FUTURE TRENDS

BC's forestry industry has faced significant challenges arising from the collapse of the US housing market and the decline of global forest product prices. Moving forward the BC industry will be significantly affected by a number of factors:

- Strong \$CDN will negatively impact sector revenue in US dollar priced commodity markets and especially from collapsed US housing market (downward pressure) ↓
- Excess softwood lumber manufacturing capacity in North America (downward pressure) ↓
- Increased demand globally, growing at about 1.5% annually (upward pressure) ↑
- Decline in Interior's allowable cut due to Mountain Pine Beetle epidemic (downward pressure) ↓

KEY FACTS

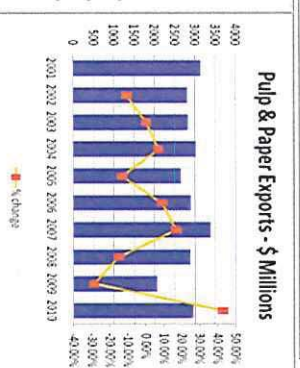
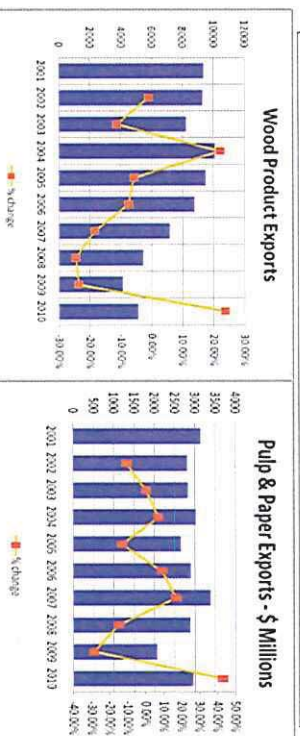
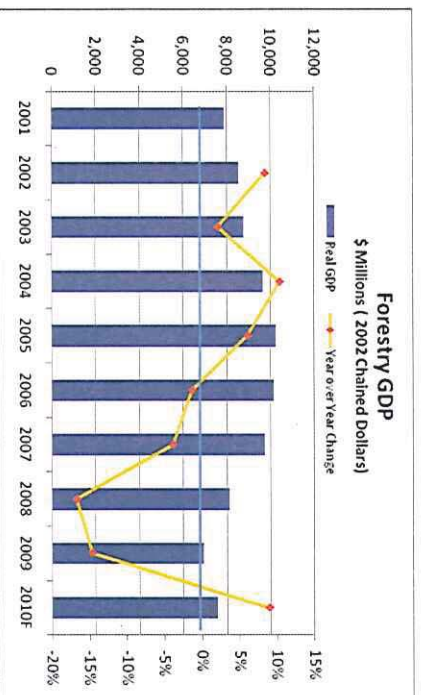
- Jobs (2009): 48,000
- GDP (2009): \$5.6 billion (current dollars)
- Exports (2010): \$9.1 billion
- Government stumpage revenues (09/10): \$.56 billion
- Total exports declined by 46% between 2001 and 2010, but have seen strong rebounds in recent years
- US still accounts for 45% of exports, but China and Japan account for 35%
- Sector includes: forestry and logging; wood manufacturing; paper manufacturing

FORESTRY ACROSS BC

- BC Stats reported in 2009 that the regions with the highest dependence on forestry and lowest economic diversity are in north central BC and on north Vancouver Island.
- Most forestry-dependent communities include Quesnel, Vanderhoof, Burns Lake, McBride-Valemont, Port Hardy and Smithers-Houston.
- First Nations will play an increasing role as forest licenses are awarded and skilled trades are developed.

INVESTMENT IN FORESTRY

- A number of BC's mills have been reopened and continue to attract investment across the province, including:
 - The Neucel specialty pulp mill in Port Alice, which was recently acquired by a Chinese company after having re-opened in 2006 to produce dissolving sulphite pulp; West Fraser Skeena Sawmills division in Terrace, which has been purchased by ROC Holdings after seeing production stalled since 2007; and the Boundary sawmill in Midway, which is to be re-opened in partnership with a Washington state company after having been closed for three years.



S.17, s. 13

GROWTH OPPORTUNITIES

Market Development

- Continued rapid growth of export opportunities in many Asian markets, especially China as export taxes on logs from Russia (China's primary supplier of softwood logs) decrease supply and as BC efforts to create new market demand take hold. Specific sub-sectors like the multi-storey/multi-family market in China could mean a breakthrough for B.C. China builds about seven million walk-up apartment units a year and has set a national goal to build 10 million affordable housing units this year.
- Reconstruction in Japan following the devastating earthquake and tsunami will likely result in increased demand for BC wood products, including paper products and lumber. It is estimated that the Northern Japan disaster may have destroyed up to 35% of Japan's plywood capacity. Past crises such as the Wenchuan earthquake in China and the Kobe earthquake in Japan have highlighted the flexibility of wooden structures in resisting earthquake damage.
- Ongoing (Canada-European Union, India, Korea) and prospective (Japan) trade negotiations present an opportunity to remove tariffs and non-tariff barriers to British Columbia's wood products and forestry-related services.

New Product Development

- New markets and expanding demand for dissolving sulphite pulp opportunities for re-purposing of existing BC pulp mills with batch digesters to meet growing demand in Asian and Indian markets (for example, rayon and other fabrics).
- Development of torrefied "Black" pellet manufacturing facilities that can supply the growing demand for coal substitutes that are able to reduce the carbon footprint of coal fired electric power generation facilities in Asia and Europe.
- Capacity to build Cross Laminated Timber (CLT) Structures that will compete with steel and concrete in commercial buildings up to ten stories is a key opportunity, especially as a cost-competitive, low carbon alternative in cities, including those with earthquake zones. The demand for wood in CLT structures is three to five times that of conventional wood frame structures.

S.13, S.17

Pages 3 through 6 redacted for the following reasons:

s.17, s.13

Sawatsky, Kim JTI:EX

From: Parhar, T J S JTI:EX
Sent: Wednesday, December 28, 2011 11:47 AM
To: Bell, Pat JTI:EX
Subject: FW: heads-up: : lumber NR
Attachments: NR - Chinese lumber - 4bn - Dec 20.docx

For your approval. To go out on the 3rd of January.

For Immediate Release
[release number]

Ministry of Jobs, Tourism and Innovation

[Date]

B.C. lumber exports to China top \$1 billion milestone

VICTORIA – China is expected to join the exclusive \$1 billion club for B.C. lumber exports in 2011, becoming only the third international market to have reached this milestone. Sales to China are projected at 7.4 million cubic metres to the end of 2011, which will easily exceed the Province's aggressive target of 6.3 million cubic metres by the end of 2011.

B.C. partners with industry and the federal government in a three-way market development program targeting China and other growth markets for B.C. forest products. Since 2003, when the program started in China, B.C. sales have surged over 1,300 percent and tripled in the last two years.

Some two dozen sawmills across B.C. have re-opened or added shifts in part to supply the record lumber exports to Asia, creating thousands of jobs in communities from Vavenby to Fort St. John to Nanaimo.

Led by China, sales to B.C.'s priority Asian markets – China, Japan and South Korea -- are projected to top 10 million cubic metres in 2011, exceeding the provincial goal of 8.9 million cubic metres in sales this year, up a projected 24 percent over 2010.

Sales to China now make up about 30 percent of all B.C. lumber exports by value. Only the U.S., at 42 per cent of exports, is a larger market for British Columbia forestry.

In spite of the devastating earthquake and tsunami in March, Japan remained a strong market for B.C. lumber sales in 2010 with exports expected to exceed \$600 million in 2011. Strong sales results have also been seen in Korea where the year-to-October exports are up 28 percent over the same period in 2010. B.C. is the largest foreign supplier of construction grade softwood lumber in all three of these markets.

The provincial forest industry is a key sector in the Canada Starts Here: The BC Jobs Plan. During the BC Jobs and Trade Mission led by Premier Christy Clark in November to China and India, forest companies sold approximately 1.46 million cubic metres of lumber in China, 47 percent more than they did during a forestry-specific mission trade mission in November 2010.

Quotes:

Minister of Jobs, Tourism and Innovation Pat Bell –

"I am very proud of the work we have done in Asia, and in particular China. The Province's China market development program, in partnership with the federal government and the forest industry, is paying off in record overseas sales and thousands of jobs here in B.C."

Quick Facts:

- In the more than 160 years since B.C. started exporting lumber, only the U.S. and Japan have previously imported more than \$1 billion of B.C. lumber in a calendar year. Exports to the U.S. were valued at \$ 1.8 billion in 2010 and exports to Japan totalled \$535 million.
- 2011 exports to China are projected at 7.4 million cubic metres valued at over \$1 billion compared with 4.6 million cubic metres in 2010, a projected increase for the year of some 61 percent by volume.
- The growth of B.C.'s softwood lumber trade with China has been phenomenal. In 2003, at the start of the joint provincial-federal-industry market development program in China, B.C. exported \$69 million worth of softwood products to China and Hong Kong. By the end of 2011, B.C. exports will have passed \$1 billion – an increase of more than 1,300 percent.

Carolyn Heiman
Communications Manager
Ministry of Jobs, Tourism and Innovation
Ph. 250 387-2799

From: Adair, Marisa GCPE:EX
Sent: Wednesday, December 28, 2011 11:34 AM
To: Parhar, TJ S JTI:EX
Cc: MacInnis, Matthew JTI:EX; Heiman, Carolyn GCPE:EX; Adair, Marisa GCPE:EX; Ryan, Fergus GCPE:EX
Subject: heads-up: : Lumber NR

Hi TJ: HQ had asked for this one to go out the door Jan 3. I believe they said that Min Bell had suggested this and wanted it to go out asap early in the New Year. Can you advise re: sign-off, will MPB even be able to look at it this week? HQ seemed extremely keen to get this out first day everyone's back at work after New Year's. Regards, M

NEWS RELEASE

For Immediate Release

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[release number]

[Date]

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Carolyn Heiman
Communications Manager
Ministry of Jobs, Tourism and Innovation
Ph. 250 387-2799

Sawatsky, Kim JTI:EX

From: Murry, Sean JTI:EX
Sent: Friday, December 2, 2011 5:30 AM
To: Bell, Pat JTI:EX
Cc: MacInnis, Matthew JTI:EX; Ehl, Cameron JTI:EX; Parhar, T J S JTI:EX
Subject: Fw: Jobs numbers for November - B.C. lost 6,600 jobs & unemployment rate rose to 7.0%

All things considered a better result than anticipated.

Sean Murry

Sent from my BlackBerry Wireless Handheld

From: James, Ben GCPE:EX
Sent: Friday, December 02, 2011 05:26 AM
To: Abrams, Rachel JTI:EX; Adair, Marisa GCPE:EX; Baskerville, Shannon JTI:EX; Edwardson, Jamie GCPE:EX; Ehl, Cameron JTI:EX; Gleeson, Kelly T GCPE:EX; Godin, Keith JTI:EX; Gordon, Matt GCPE:EX; Hayden, Dana JTI:EX; Helman, Carolyn GCPE:EX; Howard, Samantha A FIN:EX; MacInnis, Matthew JTI:EX; McAndrews, Caroline GCPE:EX; Mills, Shane PREM:EX; Murry, Sean JTI:EX; Paine, Alison GCPE:EX; Parhar, T J S JTI:EX; Scott, Brenda JTI:EX; Stewart, Melanie AGRI:EX; Sutherland, Aaron FIN:EX; Sweeney, Neil GCPE:EX; Young, Kerry JTI:EX
Subject: Jobs numbers for November - B.C. lost 6,600 jobs & unemployment rate rose to 7.0%

Top Three Messages:

1. Despite last month's overall results, B.C. did record an increase in full-time positions and had good job growth in our manufacturing, natural resources and construction sectors.
2. B.C. has added 49,200 full-time jobs in 2011 and posses Canada's third best full-time job growth rate for the year.
3. B.C.'s unemployment rate remains below the national average and is lower than it was at the start of 2011.

Labour Force Survey - November 2011 Numbers

<http://www.statcan.ca/english/Subjects/Labour/LFS/lfs-en.htm> and <http://www.statcan.gc.ca/pub/71-001-x/71-001-x2011011-eng.pdf>

British Columbia lost 6,600 jobs in November and the unemployment rate rose to 7.0%.

2,282,300 people were working in British Columbia during November. So far in 2011, B.C. has added 21,600 jobs. Compared with November 2010, there are 8,800 more people working today.

There were ***1,781,600 full-time jobs*** in B.C. during November ***an increase of 1,100 positions*** from October. So far in 2011, B.C. has gained 49,200 full-time jobs. Compared with November 2010, full-time employment is up by 37,000 positions.

Part-time employment was reported at 500,600 positions, down by 7,700 jobs from October. So far in 2011, part-time employment has decreased by 27,700 positions. Compared with November 2010, part-time employment is down by 28,300 positions.

Since December 2001, BC has added 389,900 jobs. (In December 2001, there were 1,892,400 jobs.) 302,900 or 78 per cent of which are full-time positions. (In December 2001, there were 1,478,700 full-time jobs).

B.C.'s labour force increased by 4,400 people in November and now stands at 2,454,700. Compared with one year ago, B.C.'s labour force has increased by 9,100 people.

B.C.'s unemployment rate of 7.0% is up from October's rate of 6.6% and is unchanged from November 2010. B.C. has Canada's fourth lowest unemployment rate. AB (5.0%), SK (5.1%) and MB (5.5%) have lower unemployment rates.

The unemployment rate for youth (15 to 24 years of age) was recorded at 13.6 per cent, up by 0.8 percentage points from October. In November 2010, the youth unemployment rate was recorded at 10.5 per cent.

There were 172,400 people in B.C. reported as being unemployed, an increase of 11,000 compared with October. In November 2010, 172,100 British Columbians were classified as being unemployed.

Economic Region Results

(Please note StatsCan uses a three-month moving average to determine these numbers, hence the discrepancies with the overall provincial job numbers) <http://www40.statcan.ca/01/cst01/lfs05f-eng.htm>

Vancouver Island and Coast

- 355,300 jobs – down by 800 positions from October (356,100) and down by 25,800 positions compared with November 2010 (381,100)
- 6.4% unemployment rate – down from 6.9% in October but up from 5.8% in November 2010

Lower Mainland-Southwest

- 1,452,300 jobs – down by 2,000 positions from October (1,454,300) but up by 48,300 positions compared with November 2010 (1,404,000)
- 6.2% unemployment rate – down from 6.7% in October and down from 7.0% in November 2010

Thompson-Okanagan

- 251,500 jobs – down by 400 positions from October (251,900) and down by 11,400 positions compared with November 2010 (262,900)
- 6.9% unemployment rate – down from 7.2% in October and down from 8.3% in November 2010

Kootenay

- 74,200 jobs – up by 1,000 positions from October (73,200) and up by 8,900 positions compared with November 2010 (65,300)
- 6.4% unemployment rate – down from 7.2% in October and down from 8.8% in November 2010

Cariboo

- 82,500 jobs – down by 1,200 positions from October (83,700) but up by 1,000 positions compared with November 2010 (81,500)
- 6.9% unemployment rate – down from 7.8% in October and down from 7.1% in November 2010

North Coast and Nechako

- 44,400 jobs – down by 400 positions from October (44,800) but up by 2,300 positions compared with November 2010 (42,100)
- 7.7% unemployment rate – down from 8.2% in October but up from 7.3% in November 2010

Northeast

- 36,500 jobs – down by 300 positions from October (35,800) and down by 100 positions compared with November 2010 (36,600).
- Statistics Canada did not provide an unemployment number for the Northeast this month.
 - In October the unemployment rate for the region was recorded at 4.3%. In November 2010, the unemployment rate was 6.6%.

Jobs in B.C.'s Four Census Metropolitan Areas – Three-month moving average

Kelowna

- 92,400 jobs – down by 2,100 positions from October (94,500) and down by 3,500 positions from one year ago
- 8.1% unemployment rate – up from 7.5% in October but unchanged from November 2010.

Abbotsford-Mission

- 87,000 jobs – down by 1,200 positions from October (88,200) and down by 1,000 positions from one year ago
- 8.5% unemployment rate – up from 7.9% in October but down from 9.6% in November 2010

Vancouver

- 1,275,400 jobs – up by 3,300 positions from October (1,272,100) and up by 43,300 positions from one year ago
- 6.7% unemployment rate – down from 6.8% in October and down from 7.2% in November 2010

Victoria

- 178,100 jobs – down by 2,300 positions from October (180,400) and down by 3,400 positions from one year ago
- 6.1% unemployment rate – unchanged from October and up from 5.7% in November 2010

Employment by Industry – Where the jobs were gained and lost

The Goods-Producing Sector gained 10,600 jobs in November, while the Services-Producing Sector lost 17,200 jobs.

Goods Producing Sector (450,200 jobs)

- Agriculture: 24,500, a gain of 600
- Forestry, fishing, mining and gas extraction: 40,400, a gain of 1,800
- Utilities: 11,300, a gain of 800
- Construction: 209,600, a gain of 1,900 (and up by 27,300 positions so far this year)
- Manufacturing: 164,400, a gain of 5,400 (but down by 14,600 so far this year)

Services Producing Sector (1,832,100 jobs)

- Trade: 356,500, a loss of 4,300
- Transportation and warehousing: 4,000, a gain of 4,000
- Finance, insurance, real estate and leasing: 137,000, a loss of 700
- Professional, scientific and technical services: 187,000, a gain of 1,800
- Business, building and other support services: 85,500, a loss of 12,900
- Educational services: 167,800, a loss of 5,300
- Health care and social assistance: 272,100, a gain of 2,400
- Information, culture and recreation: 107,000, a loss of 3,400
- Accommodation and food services: 180,500, a loss of 600 (but up by 17,600 so far in 2011)
- Other services: 103,800, a gain of 2,600
- Public administration: 106,300, a loss of 900

Canadian Numbers:

Canada lost 18,600 jobs in November and the national unemployment rate rose to 7.4 per cent.

Full-time employment increased by 34,600 jobs and part-time employment fell by 53,300 positions.

So far this year's Canada has added 181,700 jobs and compared with November 2010, there are there are 212,100 more people working in Canada.

Four provinces gained jobs in October. Ontario led the way with 16,600 new jobs, followed by AB (4,500) NS (4,400) and PEI (600)

Six provinces lost jobs in October. Quebec lost the most jobs (-30,500) followed by BC (-6,600), SK (-4,200), MB (-1,800), NB (-1,700), and NL (-300)

Average Hourly Wages:

<http://www40.statcan.gc.ca/101/cst01/labr69k-eng.htm>

In November 2011, B.C.'s average hourly wage rate was \$23.43 – up by 2.3 per cent compared with November 2010 (\$22.90), and a 24 per cent increase compared with the average hourly wage in December 2001 (\$18.13). B.C. has Canada's fourth highest average hourly wage.

For BC youth under 25, the average hourly wage in November was \$13.51, a decrease of 1.0 per cent compared with November 2010 and the fourth highest in Canada.

Suggested Messaging:

4. Despite last month's overall results, B.C. did record an increase in full-time positions and had good job growth in our manufacturing, natural resources and construction sectors.
5. B.C. has added 49,200 full-time jobs in 2011 and possesses Canada's third best full-time job growth rate for the year.
6. B.C.'s unemployment rate remains below the national average and is lower than it was at the start of 2011.
7. Job creation is our government's number one priority, this is why we launched the BC Jobs Plan and this is why Premier Clark just led a trade mission to China and India – to sell our goods and services to these growing economies and create jobs here at home.
8. This week we announced three Regional Economic Investment Pilot programs – for north Vancouver Island (Campbell River), the Cariboo and the North Fraser communities of Pitt Meadows, Maple Ridge and Mission.
 - o These three projects will seek out ways to attract investment, identifying opportunities, build economic diversification and create jobs.
9. We are still living in turbulent economic times, but B.C. is well positioned to weather the storm and be a safe harbour. This is something investors are looking for.

*Ben James
Public Affairs Officer
Ministry of Jobs, Tourism and Innovation
250-356-8177 - office
250-220-0537 - mobile
Ben.James@gov.bc.ca*

Sawatsky, Kim JTI:EX

From: EhI, Cameron JTI:EX
Sent: Wednesday, December 21, 2011 3:19 PM
To: Bell, Pat JTI:EX
Subject: Fw: FOR APPROVAL: BC Jobs Plan NR - With Stakeholder Quote
Attachments: NR_BC Jobs Plan_Making Progress_Dec 2011.docx

PO would like this NR to get out there. Just a recap of the Jobs Plan. For your approval.

From: MacInnis, Matthew JTI:EX
Sent: Wednesday, December 21, 2011 01:46 PM
To: EhI, Cameron JTI:EX
Subject: FW: FOR APPROVAL: BC Jobs Plan NR - With Stakeholder Quote

From: Helman, Carolyn GCPE:EX
Sent: Monday, December 19, 2011 7:18 AM
To: MacInnis, Matthew JTI:EX; Parhar, TJ S JTI:EX; EhI, Cameron JTI:EX
Cc: Murry, Sean JTI:EX; Adair, Marisa GCPE:EX
Subject: FOR APPROVAL: BC Jobs Plan NR - With Stakeholder Quote

Guys

I'm putting these NR (and a couple of other things this am) near the top of your email in the hopes that they can get approved today. Thx. C

NEWS RELEASE

For Immediate Release

Ministry of Jobs, Tourism and Innovation

[release number]

Dec. 22, 2011

Making Progress: The BC Jobs Plan: Three Months In

VICTORIA – In the three months since its launch, Canada Starts Here: The BC Jobs Plan has resulted in the introduction of new job and skills training programs, further development of export markets, promotion of B.C. as a safe harbour for investment, and local economic development initiatives.

This is just one more example of how, in the last year, government has made significant progress towards improving the lives of British Columbians and their families by creating and protecting jobs, by becoming more open and transparent, and by making the tough choices necessary to continue to be fiscally responsible in these uncertain economic times.

The BC Jobs Plan's progress has included a new initiative to develop 50 skills training programs at 20 post-secondary institutions, the launch of the B.C. Immigration Task Force, a \$1-million contribution to a mining partnership to develop human resources strategy to meet the industry's future labour demand, and the launch of the 'Gaining The Edge: A Five-Year Strategy for Tourism in British Columbia'. The seven remaining sectors – agrifoods, forestry, international education, mining, natural gas, tourism, technology and green economy, and transportation – with have their strategies launched in 2012.

Internationally, more than 60 agreements and partnerships, worth a value of \$1.4 billion, were signed during Premier Clark's BC Jobs and Trade Mission to China and India in November. It was also announce that the Province announced it is working with the federal government to co-locate B.C.'s Indian trade presence to the Canadian consulates in Mumbai and Chandigarh – helping achieve the Jobs Plan's goal of doubling British Columbia's international trade presence.

Quotes:

Pat Bell, Minister of Jobs, Tourism and Innovation

"Over the last three months, I've travelled across B.C. and to Asia to speak with people about the Jobs Plan and to promote our province. I have been very encouraged by the responses I'm heard especially the strong sense of optimism about B.C.'s economic prospects prevails. As we move into 2012, I look forward to hearing from British Columbians on ways our government can help create jobs and build our province's economic growth."

Doug MacLaren, Chief Executive Officer, Resource Training Organization (RTO) of British Columbia

"Across the resource sector, from mining to shipbuilding, major projects are underway to ensure British Columbians have the skills needed to take advantage of the pending economic expansion. The B.C. government continues to support our efforts to develop a world-class, skilled workforce."

Progress resulting from Canada Starts Here: The BC Jobs Plan

- \$15 million towards the Port of Prince Rupert's Road Rail Utility corridor project
- Commitment to invest \$50 million to improve the rail transportation network that links to Deltaport
- Creation of a Major Investments Office
- Doubling B.C. international trade presence
- Establishing a hosting program to assist overseas investors
- Launch of an international marketing campaign to attract international companies to B.C.
- Launch of the Major Projects BC website that provides information on major resource development projects
- \$5.5 million towards settlement-focused language training under the English Language Services for Adults (ELSA) program
- Enhancements to the BC Provincial Nominee Program
- A new Northern Skills Training Pilot in partnership with the United Steelworkers Union
- The establishment of the B.C. shipbuilding and Repair Sector Table
- B.C.'s largest-ever international trade mission to China and India
- Establishing a business accelerator program operating out of the New West Partnership's Shanghai trade office
- Three regional economic development pilot projects
- Launch of 'Gaining The Edge: A Five-Year Strategy for Tourism in British Columbia'
- Woodland licence with the Huu-ay-aht First Nation
- \$1 million for a mining partnership human resource strategy program
- The launch of three online job tools to help inform British Columbians about the employment opportunities in the areas where they live
- \$10 million in skill training funding to industry to help them develop new programs to meet their labour market needs
- The creation of the B.C. Immigration Task Force
- Announcement of chairs for Jobs and Investment Boards and Aboriginal Business and Investment Council.
- Granting of a Mines Act permit for the Barkerville Gold Mine
- \$13 million towards 50 new employment skills training programs delivered by 20 post-secondary institutions

Learn More:

Canada Starts Here: The BC Jobs Plan – www.BCJobsPlan.ca

Contact:

Name
Title
Ministry
Ph. #