Major Primary Timber Processing Facilities in British Columbia

2018

BRITISH COLUMBIA
Ministry of Forests, Lands, Natural Resource Operations and Rural Development

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2018

Forest Policy and Indigenous Relations Division
Ministry of Forests, Lands, Natural Resource Operations and Rural Development
Victoria, BC

April 2020

Foreword

This edition of the *Major Primary Timber Processing Facilities in British Columbia* summarizes the activity of timber processing mills that operated during 2018. It covers sawmills, veneer and panel plants, pulp and paper mills, chip mills, pellet mills, shake and shingle, and pole and post mills. Some do not have primary log processing capabilities and process residual fibre from other mills. For mills that produced more than one product (e.g., lumber and veneer), each operation is listed in the respective section of the report. This report does not include re-manufacturing plants.

Most of the information contained in this report was gathered through 2018 and earlier surveys of individual processing mills. If survey responses were not provided, the Ministry of Forests, Lands, Natural Resource Operations and Rural Development (the Ministry) staff might use trade publications and corporate annual reports to make estimations. In some cases, the Ministry staff provided estimates based on their knowledge of the operation and information reported in previous years along with production information for selected forest products from Statistics Canada.

This report is available free of charge online at:

https://www2.gov.bc.ca/gov/content/industry/forestry/competitive-forest-industry/forest-industry-economics/fibre-mill-information/major-timber-processing-facilities-survey

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Acknowledgements

The co-operation of mill personnel who responded to the 2018 BC Mill List Survey is gratefully acknowledged.

The important roles played by the Ministry's district staff in verifying local mill information and the Ministry's contractor Lynnette Stork in computer programming are also acknowledged.

We highly acknowledge the significant contributions made by GEOBC.

The survey and analysis were conducted by Julie Leng and Anshul Dhankher and reviewed by Teresa Zhuang. Additional support was provided by Stephen Davis, Alex Barnes, and Mike Byl.

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Abbreviations for Products

CHP	- Chip	PLE	- Pole
LBR	- Lumber	PLT	- Pellet
LVL	- Laminated Veneer Lumber	PLY	- Plywood
OSB	- Oriented Strand Board	PNL	- Panel
PLP	- Pulp	PST	- Fence Post
PPR	- Paper	UTI	- Utility Pole
SS	- Shake and Shingle	VNR	- Veneer

Introduction

This report presents summary statistics derived from the 2018 and earlier mill surveys, and selected analyses of these statistics. Fibre supply and log use in the province are examined through a series of tables and pie charts. These are followed by time series statistics for lumber, veneer mills, pulp and paper, pellet, and shake and shingle mills. The final sections provide a list of the primary mills operating in the province in 2018.

Each year, surveys are sent to mill operators. Based on responses, mills are classified as a) open with the response, b) presumed open without response, c) did not operate at all during the year (temporary or indefinite closure) or d) closed (permanently). Statistics in this report are derived from mills in categories a) and b). Mills that have announced permanent closure during 2018 are recorded as category a) for 2018. Some historical data have been adjusted in this report to reflect revised information received from mill representatives for the 2018 Mill List report, and therefore, may differ from the data published in previous reports.

Primary Log Use and Wood Fibre Supply in British Columbia, 2018

Primary Log Supply and Demand

Figure 1 presents the volume of log supply that is consumed by different types of mills on the coast and in the interior. The major findings from this figure are listed below:

Log Demand

- In 2018, approximately 64.3 million cubic metres of logs were consumed by major primary processing mills in BC, while about 5.1 million cubic metres of logs were exported.
- There were 121 sawmills in the province that consumed 45.4 million cubic metres, or 71% of logs in 2018. Unlike the interior where 80% of logs went to sawmills, less than 50% of logs went to sawmills on the coast.
- Residual wood chips produced by sawmills or veneer mills, together with whole-log chips produced in pulp mills and whole-log chipping mills, are used to produce pulp and paper products in BC. Due to sawmill curtailments in the interior as a result of the allowable annual cut (AAC) reduction and wildfires, pulp and paper mills consumed a higher volume of whole-log chips in 2018 to sustain their operations. The combined log consumption by chip mills and pulp mill wood rooms showed a 48% increase, from 4.2 million cubic metres in 2017 to 6.2 million cubic metres in 2018.

Log Supply

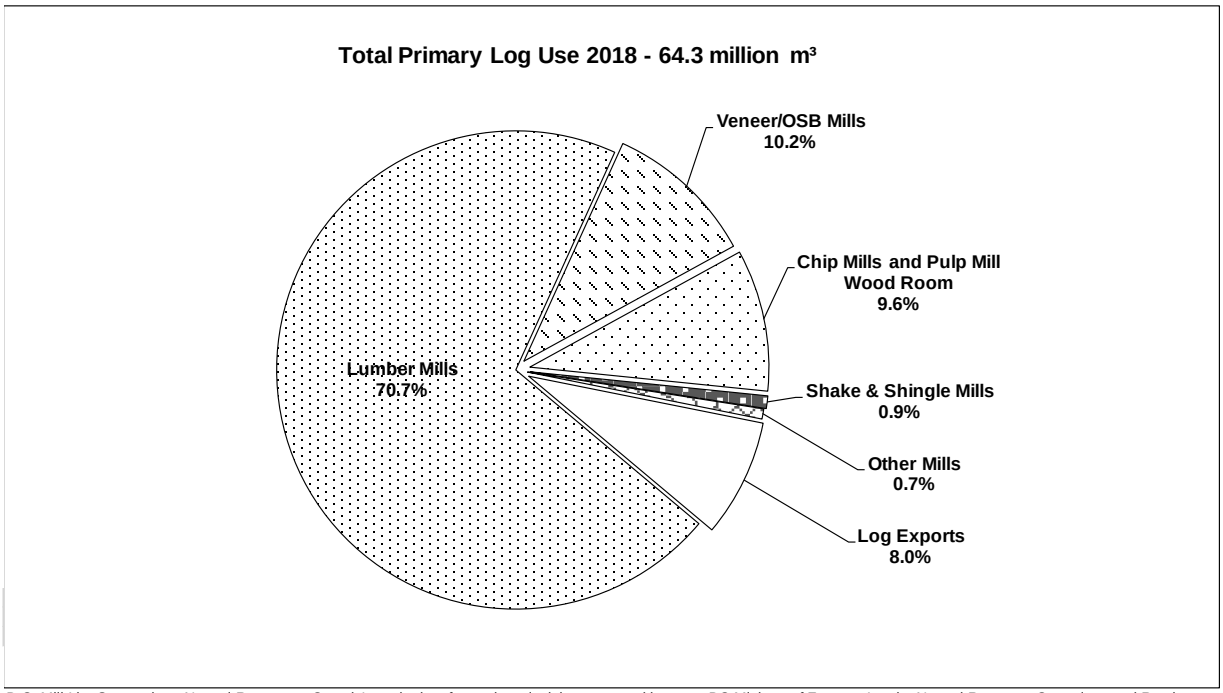
- The total harvest volume in 2018 was 67.8 million cubic metres, representing an increase of 5.6% from 2017. Interior companies harvested 73% of the provincial total and coastal companies harvested the rest. According to the *2018 Economic State of the BC Forest Sector* report, the major species harvested on the coast were hemlock (35.2%), Douglas fir (29.8%), red cedar (16.5%), and balsam (11.6%). Lodgepole pine (30.1%) and spruce (30.1%) were dominant species harvested in the interior.

- Imported logs have long been an important component of the fibre supply for BC mills. The record-breaking 2017 wildfire destroyed timber and reduced the fibre supply to the wood manufacturing sector. As a result, BC forest companies increased their log import volume from 28,000 cubic metres in 2017 to 82,000 cubic metres in 2018.

Figure 1: Estimated British Columbia Primary Log Use - 2018

	Coast			Interior			Province		
	Number of Mills	Est. Volume Used (000 m³)	Per Cent	Number of Mills	Est. Volume Used (000 m³)	Per Cent	Number of Mills	Est. Volume Used (000 m³)	Per Cent
Primary Log Use									
Lumber Mills	41	6,923	44.0%	80	38,524	79.3%	121	45,447	70.7%
Veneer/OSB Mills	5	1,960	12.5%	12	4,614	9.5%	17	6,574	10.2%
Chip Mills and Pulp Mill Wood	11	1,884	12.0%	12	4,284	8.8%	23	6,168	9.6%
Shake & Shingle Mills	32	526	3.3%	3	22	0.05%	35	548	0.9%
Other Mills	10	90	0.6%	35	354	0.7%	45	444	0.7%
Log Exports		4,334	27.6%		785	1.6%		5,120	8.0%
TOTAL	99	15,717	100%	142	48,583	100%	241	**64,301**	100%
Log Availability									
Total Harvest		18,047			49,753			67,800	
Log Imports								82	
TOTAL		18,047			49,753			**67,883**	
Difference		2,330	*12.9%*		1,169	*2.4%*		3,582	*5.3%*

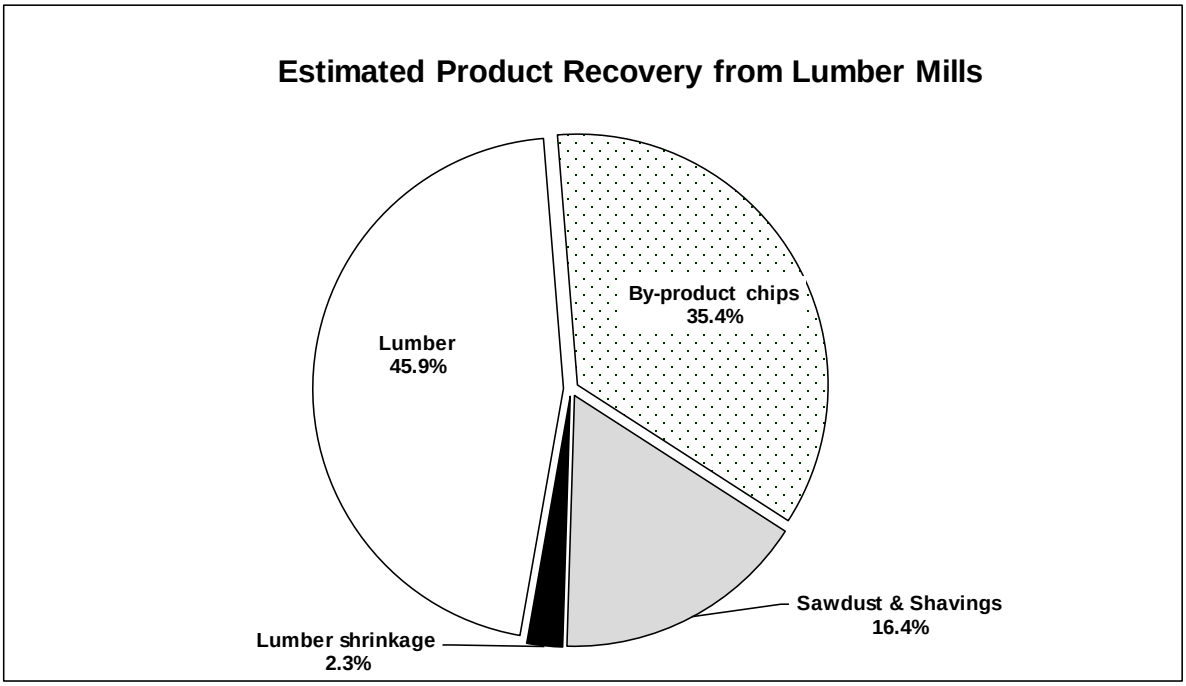
*Total harvest includes all logs, special forest products, species and grades billed to crown, private and federal land. Waste, reject and Xmas trees were excluded.



B.C. Mill List Survey data; Natural Resources Canada's trade data for total provincial exports and imports; BC Ministry of Forests, Lands, Natural Resource Operations and Rural Development log export statistics for the proportion of exports from the Coast versus Interior.
Note: Statistics above do not include mills that were closed or did not operate in 2017.

Figure 2: Estimates of Product Recovery from Lumber Mills - 2018

	Units	Coast	Interior	Province
Number of Mills		41	80	121
Log Input	(million m^3)	6.90	38.50	45.45
Lumber Output				
Lumber Output (nominal measure)	(mmfbm)	1.60	10.90	12.50
Lumber Recovery Factor	(mfbm/m^3)	0.232	0.283	0.275
Conversion Factor *	(m^3/mfbm)	2.07	1.61	1.67
= Actual Volume of Lumber Produced	(million m^3)	3.31	17.55	20.86
As Per Cent of Log Input	(%)	48.0%	45.6%	45.9%
Lumber Shrinkage				
Shrinkage (5% of lumber production)	(million m^3)	0.17	0.88	1.04
As Per Cent of Log Input	(%)	2.4%	2.3%	2.3%
By Product Chip Output (from Lumber Mills)				
By Product Chip Output	(million bdu)	1.00	4.80	5.80
By Product Chip Recovery Factor	(bdu/'000 m^3)	145	125	128
Conversion Factor*	(m^3/bdu)	2.86	2.75	2.77
= Volume of Chips Produced	(million m^3)	2.86	13.20	16.06
As Per Cent of Log Input	(%)	41.4%	34.3%	35.3%
Sawdust and Shavings - Estimated Volume	(million m^3)	0.56	6.87	7.44
As Per Cent of Log Input	(%)	8.2%	17.9%	16.4%



Notes:

* Conversion factors are used to convert lumber output or by-product chips in nominal measure to solid wood equivalent.

mmfbm = million board feet; mfbm = thousand board feet; m^3 = cubic metres; bdu = bone dry unit = 2400 pounds.

Conversion factors used in the analysis are based on Forintek Canada Corp., "Conversion Factors for the Forest Products Industry in Western Canada", Special Publication No. SP-24R, 1985 and "Major Primary Timber Processing Facilities in British Columbia 2007", Appendix 1, page 24.

1

Lumber Recovery

The recovery factor is an indicator of lumber mill health measured by output as a percent of input. As can be seen in Figure 2, 45.9% of the wood volume entering sawmills was converted to lumber, 35.4% was converted to residual chips for pulp mills, and an estimated 16.4% was converted to sawdust and shavings for pellet and panel mills.

Fibre Used by Pulp, Pellet, and Panel Mills

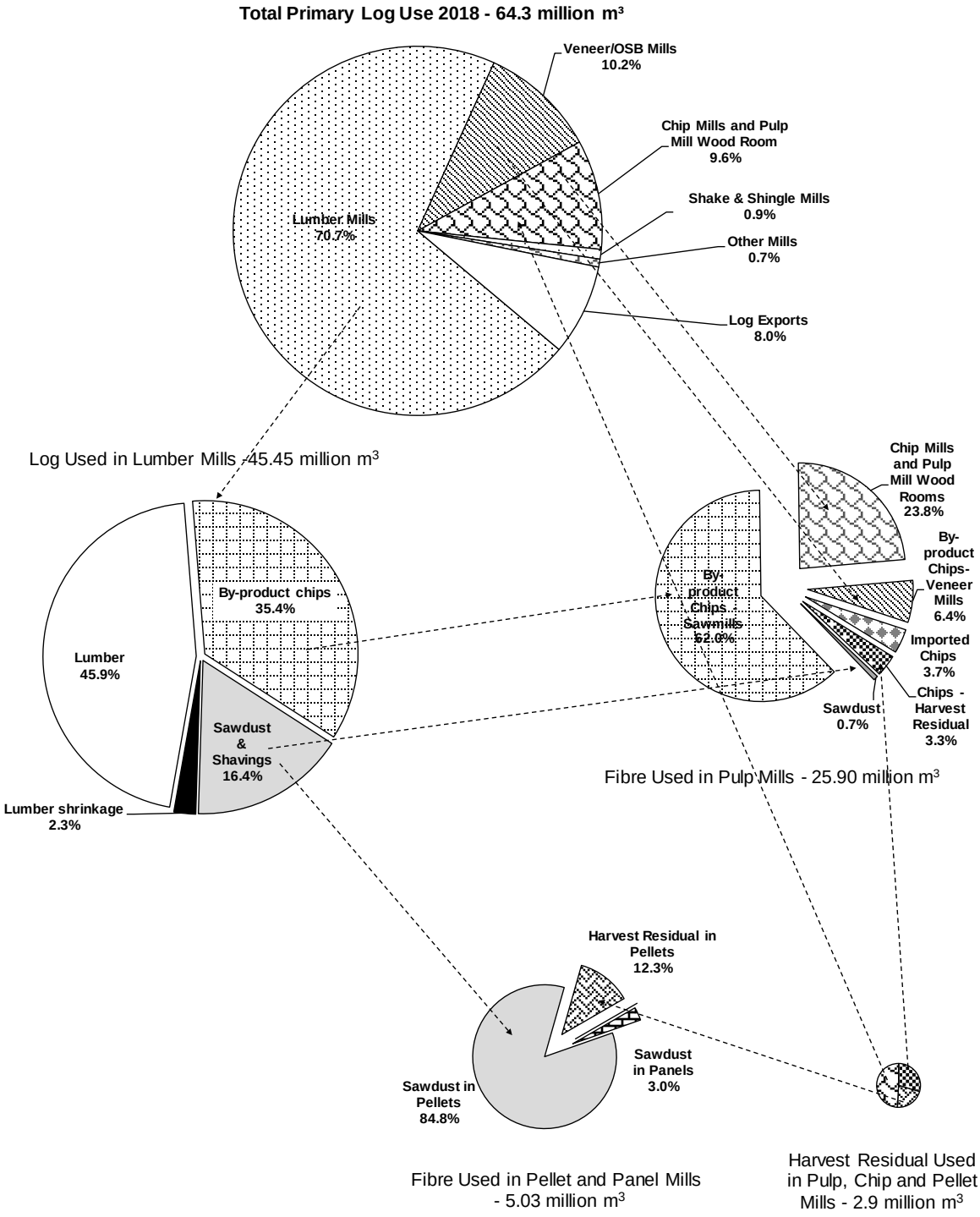
Figure 3 combines information from Figure 1 and Figure 2 with a chart showing the sources of fibre used by pulp, pellet, and panel mills. The main findings from this figure are listed below:

- Pulp mills processed 26 million cubic metres of fibre in 2018. Roughly 18 million cubic metres of chips consumed by BC pulp mills were purchased from sawmills and veneer mills that produced chips as by-products, accounting for 68% of their total fibre input. About 6.2 million cubic metres of chip consumed by BC pulp mills were produced by chipping plants or on-site pulp mill wood rooms, accounting for 24% of their total fibre input. These whole-log chips played a critical role in maintaining a consistent overall chip supply to pulp mills.
- Pellet and panel mills processed just over five million cubic metres of fibre (mainly sawdust and shavings) in 2018, representing a 7% decrease from 2017.
- Harvest residual fibre[2] has become an alternative source of fibre for some mills where this fibre type is suitable and cost effective. In 2018, 13 mills in the province processed nearly three million cubic metres of harvest residual fibre, which was more than double the volume reported in 2017.[3] Whole-log chipping mills consumed half of the provincial total, followed by pulp mills (30%) and pellet mills (20%).

[2] Harvest residuals in this report refer to the fibre removed from the cut block following harvesting activities and not transported to primary processing facilities (i.e., not a sawlog or a traditionally defined pulp log).

[3] The number of firms reported to the mill list survey is believed to be below the actual number.

Figure 3: Estimated British Columbia Log and Fibre Use - 2018

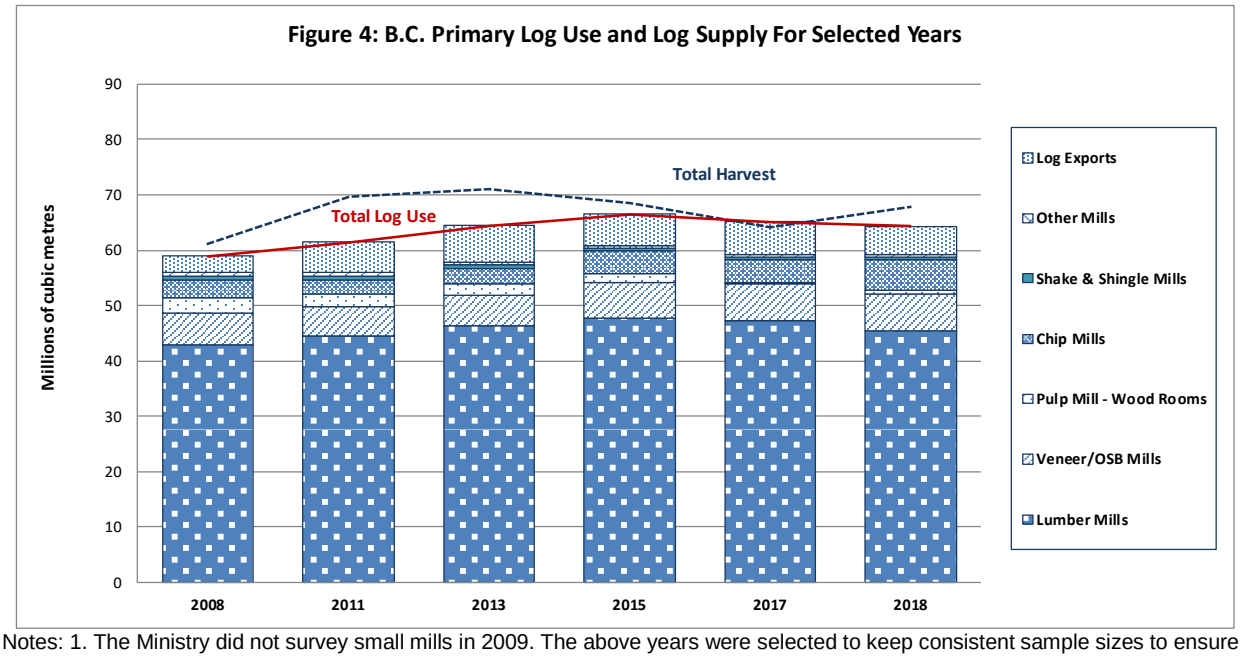


Provincial Log Supply and Demand (2008-2018)

As shown in Figures 1 and 4, the primary provincial log use volume estimated in this report exceeded the harvest volume by 3.6 million cubic metres (5.3%) in 2018.This difference could be attributed to a number of factors, including seasonality inherent in timber harvesting, log inventory changes, different company reporting years, the estimates made for mills that did not complete the survey, and the increased use of cruise-based billing.[4]

Figure 4 presents the provincial log supply and demand over a 10-year period from 2008 to 2018. Some of the key findings from this figure are listed below:

- The total log consumption increased between 2008 and 2015 and then decreased until 2018. In 2018, the total log consumption decreased by 1% to 64.3 million cubic metres, which was followed by a 4% decrease in 2017. These log consumption declines were driven primarily by decreases in five sectors: sawmills (-4%), veneer/OSB mills (-3%), shake and shingle mills (-8%), and log export (-13%).
- As noted in the previous section of this report, the production of residual chips declined as a result of the mill curtailments and closures, due to the AAC reduction and market conditions. The decreased supply of sawmill residual chips has created the increased demand for whole log chips for pulp mill to maintain a consistent chip supply. The combined log consumption by chip mills and pulp mill wood rooms increased by 30%, from 5.9 million cubic metres in 2013 to 6.2 million cubic metres in 2018.



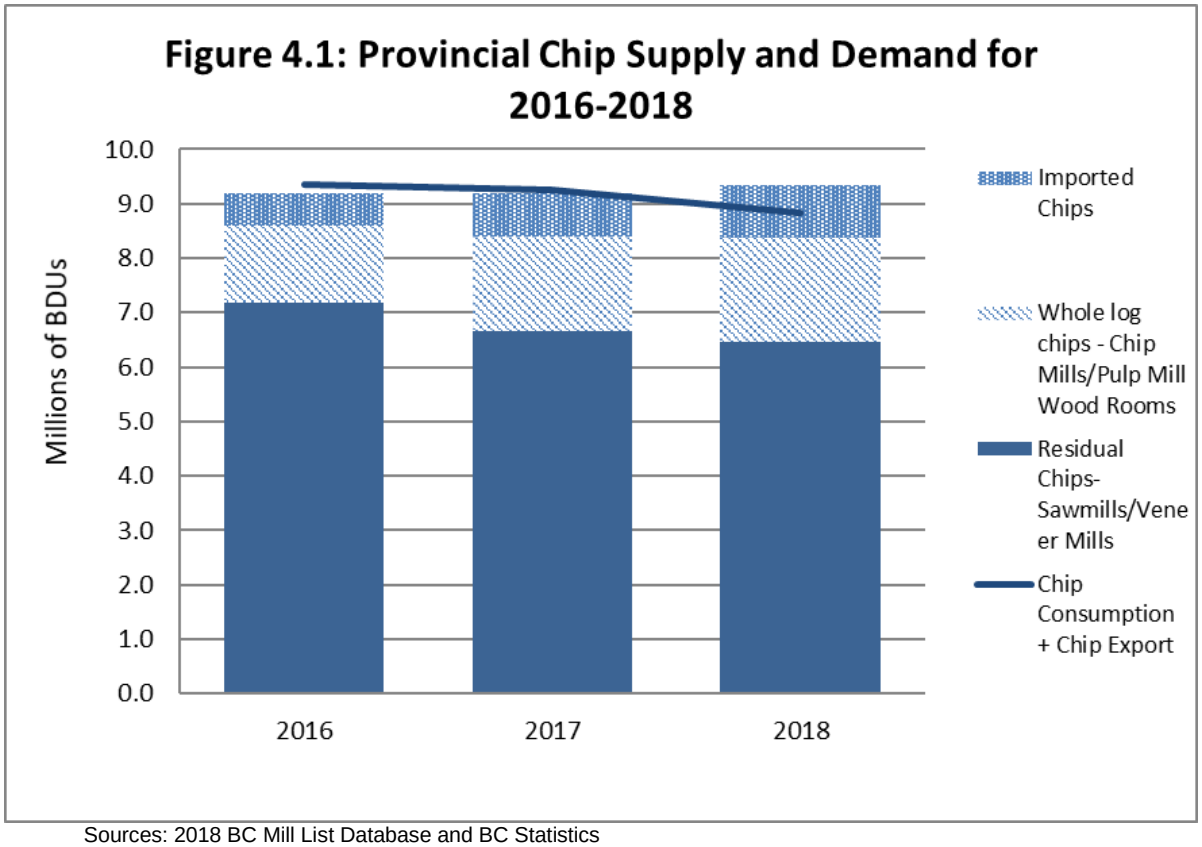
Notes: 1. The Ministry did not survey small mills in 2009. The above years were selected to keep consistent sample sizes to ensure the data accuracy and consistency over the years.
2. Shake and shingle mills were not surveyed in 2009-2013. Log use volume for shake and shingle mills in 2011 and 2013 was estimated based on the best available information.

[4] The cruise-based billing, which requires no waste estimate in the woods or scale reporting at the processing facility. Trees in the cruise estimate may not be transported out the woods. However, even directly comparing cruise estimates and scale estimates can be problematic, as things such as expected decay reducing a cruise estimate but may not result in lower scale volume in actual. In 2018, cruise-based sales represented about 24% of volume billed in the interior and 9% on the coast. There is no waste assessment on cruise-based sales which explains much of the difference between log supply and demand on the coast and in the interior.

Provincial Chip Supply and Demand

Pulp and paper mills are the major chip consumers in BC and convert low-value wood chips into high-value pulp and paper products. The main sources of chip supply are residual chips produced by sawmills or veneer mills, followed by chips produced in pulp or chip mills, as well as chips imported from the US. There can be very wide year-to-year swings in chip supply dynamics.

As can be seen in Figure 4.1, from 2016 to 2018, there was a steady reduction in the residual-chip supply due to sawmill closures and curtailments. This resulted in the need for the pulp mills to consume higher volumes of expensive whole log chips and imported chips to sustain their operation. The rising need for whole log chips led to the supply increase. As shown in Figure 4.1, the whole-log chips production increased by 40%, from 1.4 million BDUs in 2016 to 1.9 million BDUs in 2018. The chip imports grew by nearly 60%, from 601,000 BDUs in 2016 to 954,000 BDUs in 2018.



Sources: 2018 BC Mill List Database and BC Statistics

Table 1 and the following discussion provide more details about the chip supply and demand at regional level for 2016-2018:

Table 1: BC Chip Supply and Demand (000 BDUs)

Sources of Chips	2016	2017	2018
Residual Chip Production	7,186	6,661	6,454
Whole Log Chip Production	1,408	1,733	1,924
Total Provincial Chip Production	**8,594**	**8,394**	**8,378**
Total Provincial Chip Consumption	**9,084**	**9,210**	**8,837**
Total Production and Consumption Gap	**-490**	**-816**	**-459**
Provincial Chip Trade			
Chip Import	601	791	954
Chip Export	273	53	0
Net Import	**328**	**738**	**954**
Provincial Chip Balance	**-162**	**-78**	**495**

Sources: 2018 BC Mill List Database and BC Statistics
Note: Data shown in the above table may not be in line with the data published in previous mill list reports due to data adjustments made based on the information received in 2019.

Coast

Residual chips produced on the coast, in combination with chips purchased from the southern interior and imported from the US together with whole log chips, are used to produce pulp and paper products in this area. Most chips are used by Catalyst Paper in Crofton, Port Alberni, as well as Powell River, Howe Sound in Port Mellon, and Harmac in Nanaimo. In 2016-2018, a declined supply of residual chips and an increased supply of whole-log chips and imported chips were identified in this area. A deficit was seen in 2018, which was filled by the transfer of chips from the southern interior and imported chips from the US. Due to the AAC reduction and the sawmill closures in the interior, it is believed that chip-supply constraints for coastal pulp mills will increase and those mills will need to increase their reliance on whole-log and imported chips.

South

Residual chips, together with chips produced from whole logs and imported chips, are used to produce pulp in this area. Most chips are consumed by Domtar in Kamloops, Skookumchuk Pulp in Skookumchuk, Mercer (Celgar) in Castlegar, Quesnel River Pulp as well as Cariboo Pulp and Paper in Quesnel. However, demand for wood chips from coastal pulp mills has resulted in competition for residual chips in this area. In 2016-2018, the south showed a declined supply of residual chips, which was offset with the increased production of whole-log chips and imported chips.[5] A shortfall of chips relative to the regional demand was identified in 2017. Even though a surplus was seen in 2018,

[5] One pulp mill in the southern interior reported imported chip consumption in 2018

the chip supply shortage is likely to increase in this area, given the potential reduction in mill operating rates and further mill curtailments.

North

Residual chips and whole-log chips are used to produce pulp and paper products in the north. Most chips are used by four Canfor owned pulp and paper mills in Prince George and Taylor as well as one Paper Excellence owned pulp mill in Mackenzie. In 2016-2018, the north saw a reduced supply of residual chips, which was offset with the increased production of whole-log chips. A surplus was seen in 2018, but expected to decrease as a result of the AAC reduction, sawmill closures, and the competitive use of chips (e.g. pellet mills) in this area.

Time Series Data

1) Lumber Mills

Lumber is made from logs of varying species and qualities, which are processed in sawmills into standardized dimensions or specialty products. The lumber manufacturing sector makes a significant contribution to the forest industry in BC. In 2018, production in the lumber sector (i.e., lumber and chips) contributed CA$6.8 billion, or 54% of total wood product manufacturing sales in the province. In a global context, BC exported 24 million cubic metres of softwood lumber in 2018. The largest markets for BC softwood lumber exports were the US (46%), China (28%), and Japan (10%).

The following section provides summary statistics from 1990 onwards for sawmills with capacities greater than or equal to 40 million board feet per year:

Number of Mills

- The lumber manufacturing sector has been in a constant state of contraction over the last two decades. As shown in Table 2, in 2018, there were 17 major sawmills on the coast and 50 major sawmills in the interior for a total of 67 sawmills operating in the province.
- Two major sawmills curtailed their operations in 2017, which affected the reported number of operational sawmills in 2018:
  - In 2017, Western Forest Products permanently closed its Somass sawmill on the coast, bringing down the provincial capacity by 65 million board feet.[6]
  - Tolko temporarily shut down its Lakeview sawmill due to a fire in late 2017 and the operation did not resume in 2018.

Mill Capacity, Output, and Input

- Figure 5 demonstrates that the coastal lumber capacity began to decrease in the early 2000's and has remained fairly steady from 2009 onwards. The coastal lumber log input showed a 3% decline in 2018 compared to 2017. The largest producer on the coast was Western Forest Products, which had a capacity of 677 million board feet or 31% of the total coastal sawmill capacity.
- Figure 6 shows that lumber capacity in the interior rose temporarily during the early 2000's, along with the mountain pine beetle salvage efforts and the strong U.S. lumber demand prior to the recession. Since the sharp decline in production in the recession (2007-2009), production has increased, but has not reached the pre-recession highs when salvage of beetle-killed wood was at its peak. The interior's lumber log input had a 4% decrease in 2018 compared to 2017. The largest producer in the interior was Canfor, which had a capacity of 3.4 billion board feet or 31% of the total interior sawmill capacity.

Average Capacity, Capacity Utilization, and Recovery

- As shown in Table 2, the sawmill size in the interior is a lot larger than the plant size on the coast. In 2018, the average annual capacity of interior sawmills was 210

[6] There is a one-year lag for this report to capture the impact of permanent/indefinite mill closures. Mills permanently/indefinitely curtailed in 2018 are treated as active mills in 2018. The mill closure news is cited from the 2017 Mill Status Report and the provincial Mill Event database.

million board feet, which was twice as much as the size of coastal sawmills (average capacity of 112 million board feet).

- Coastal sawmill capacity utilization rates are very different from those found in the interior. The interior sawmills tend to operate on a two-shift or higher basis, due to the commodity nature of the products made. Also, producers need to reduce unit manufacturing costs with higher overall output levels. On the coast, few mills produce commodity lumber, and therefore the operating rate for each sawmill is based on its unique available log supply and the demand for its lumber products. Many coastal mills run only a single shift (despite the capacity to operate at a higher level), while there is a wide variety of shift configurations across other mills. In 2018, interior sawmills operated, on average, at 3% over a two-shift capacity, while coastal mills operated, on average, at 21% below capacity.
- The lumber recovery factor is an indicator of sawmill health measured by output as a percent of input. The computer-optimized log and lumber scanning technology has helped sawmills to reduce fibre and value losses and therefore has improved the recovery factor for the interior mills from 1990 to 2003 (Figure 9). However, the mountain pine beetle (MPB)-infestation-impacted logs significantly reduced the interior lumber recovery from 2004 to 2013. From 2014 onwards, the interior recovery has improved due to the reduction of MPB-impacted logs and the closures of inefficient mills.

Table 2: British Columbia Lumber Mill Summary Statistics for mills with estimated annual capacity of at least 40 million board feet

		1990…	1995…	2000...	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	% change 1990-2018
COAST																			
Number of Mills		43	39	37	29	24	24	21	19	21	20	17	17	18	17	18	18	17	-60%
Total Capacity	billion board feet per year	4.2	3.9	4.1	3.4	2.7	2.7	2.4	2.2	2.3	2.3	2.1	2.1	2.1	2.0	2.1	2.0	1.9	-55%
Total Output	billion board feet per year	3.8	3.4	3.1	2.6	2.4	1.7	1.5	1.2	1.4	1.4	1.4	1.4	1.7	1.6	1.7	1.5	1.5	-60%
Total Input	million cubic metres per year	17.1	15.1	13.9	11.2	10.3	7.6	6.5	4.9	5.9	6.2	6.3	6.3	7.2	6.9	7.4	6.6	6.4	-62%
Average Capacity	million board feet per mill per year	99	100	111	117	113	113	114	116	110	115	124	124	117	118	117	111	112	13%
Capacity Utilization	output divided by capacity	89%	87%	76%	76%	89%	63%	63%	55%	61%	61%	67%	67%	81%	80%	81%	75%	79%	-11%
Lumber Recovery Factor	'000 board feet per cubic metre	0.220	0.225	0.223	0.232	0.233	0.224	0.231	0.245	0.237	0.226	0.222	0.222	0.236	0.232	0.230	0.227	0.234	6%
INTERIOR																			
Number of Mills		88	82	76	71	72	72	62	53	52	56	54	52	53	52	51	51	50	-43%
Total Capacity	billion board feet per year	10.7	10.3	10.7	12.8	12.8	12.4	11.3	10.7	10.4	11.1	10.9	10.6	10.8	10.4	10.6	10.5	10.5	-2%
Total Output	billion board feet per year	10.0	10.0	10.5	14.1	14.2	13.3	9.7	7.9	9.5	10.5	10.8	11.2	10.9	11.2	11.5	11.4	10.8	8%
Total Input	million cubic metres per year	42.2	40.8	39.9	50.2	50.6	47.4	34.7	28.2	34.1	37.0	38.6	39.9	39.3	39.4	40.7	39.4	37.9	-10%
Average Capacity	million board feet per mill per year	121	126	141	180	178	172	182	202	200	198	202	204	204	200	208	206	210	73%
Capacity Utilization	output divided by capacity	93%	97%	98%	110%	111%	107%	86%	74%	91%	95%	99%	106%	101%	108%	108%	109%	103%	10%
Lumber Recovery Factor	'000 board feet per cubic metre	0.236	0.245	0.263	0.281	0.281	0.281	0.280	0.280	0.279	0.284	0.280	0.281	0.277	0.284	0.283	0.289	0.285	21%
PROVINCE																			
Number of Mills		131	121	113	100	96	96	83	72	73	76	71	69	71	69	69	69	67	-49%
Total Capacity	billion board feet per year	14.9	14.2	14.8	16.2	15.5	15.1	13.7	12.9	12.7	13.4	13.0	12.7	12.9	12.4	12.7	12.5	12.4	-17%
Total Output	billion board feet per year	13.7	13.4	13.6	16.7	16.6	15.0	11.2	9.1	10.9	11.9	12.2	12.6	12.6	12.8	13.2	12.9	12.3	-10%
Total Input	million cubic metres per year	59.2	55.9	53.8	61.4	60.9	55.0	41.2	33.1	40.0	43.2	44.9	46.2	46.5	46.3	48.1	46.0	44.3	-25%
Average Capacity	million board feet per mill per year	114	117	131	162	161	157	165	179	174	176	183	184	182	180	184	181	185	63%
Capacity Utilization	output divided by capacity	92%	94%	92%	103%	107%	99%	82%	71%	86%	89%	94%	99%	98%	103%	104%	103%	99%	8%
Lumber Recovery Factor	'000 board feet per cubic metre	0.232	0.240	0.253	0.272	0.273	0.273	0.272	0.275	0.273	0.275	0.272	0.273	0.271	0.276	0.274	0.280	0.278	20%

Source: Major Primary Timber Processing Facilities in British Columbia, ministry database, various years

Notes:

Includes only those lumber mills with a minimum estimated annual capacity of 40 million board feet per year.

Capacity estimated assuming two 8-hour shifts, 240 days per year.

Figure 5: B.C. Lumber Mills (at least 40 million board feet)
Coast Capacity, Output and Log Input

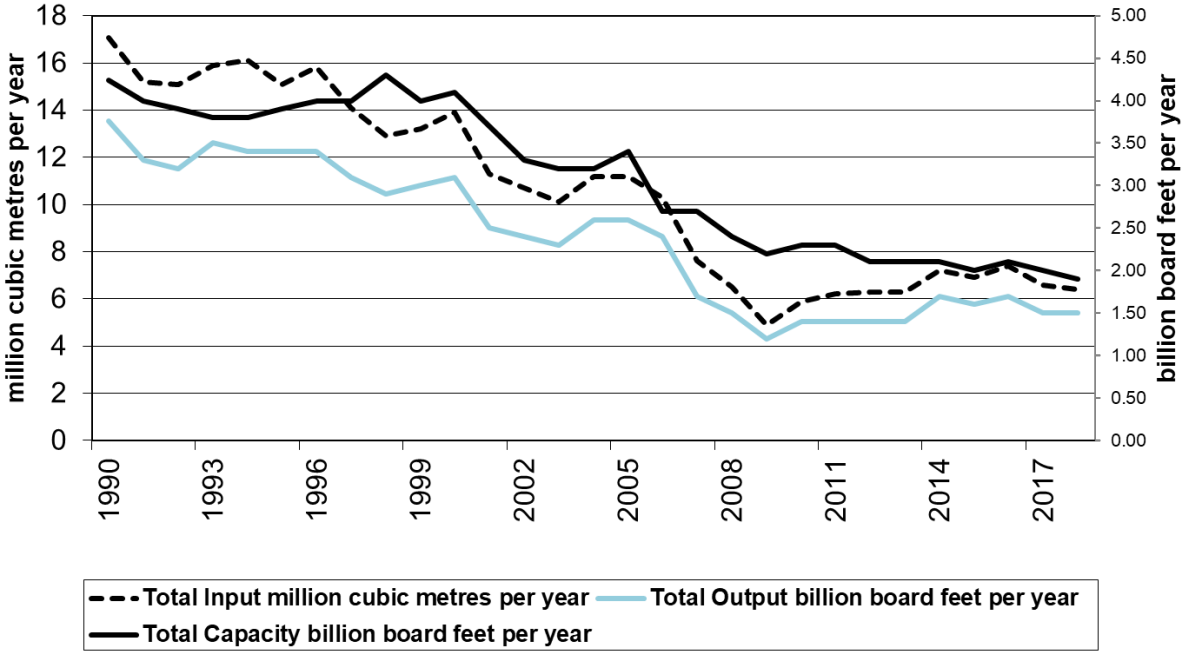


Figure 6: B.C. Lumber Mills (at least 40 million board feet)
Interior Capacity, Output and Log Input

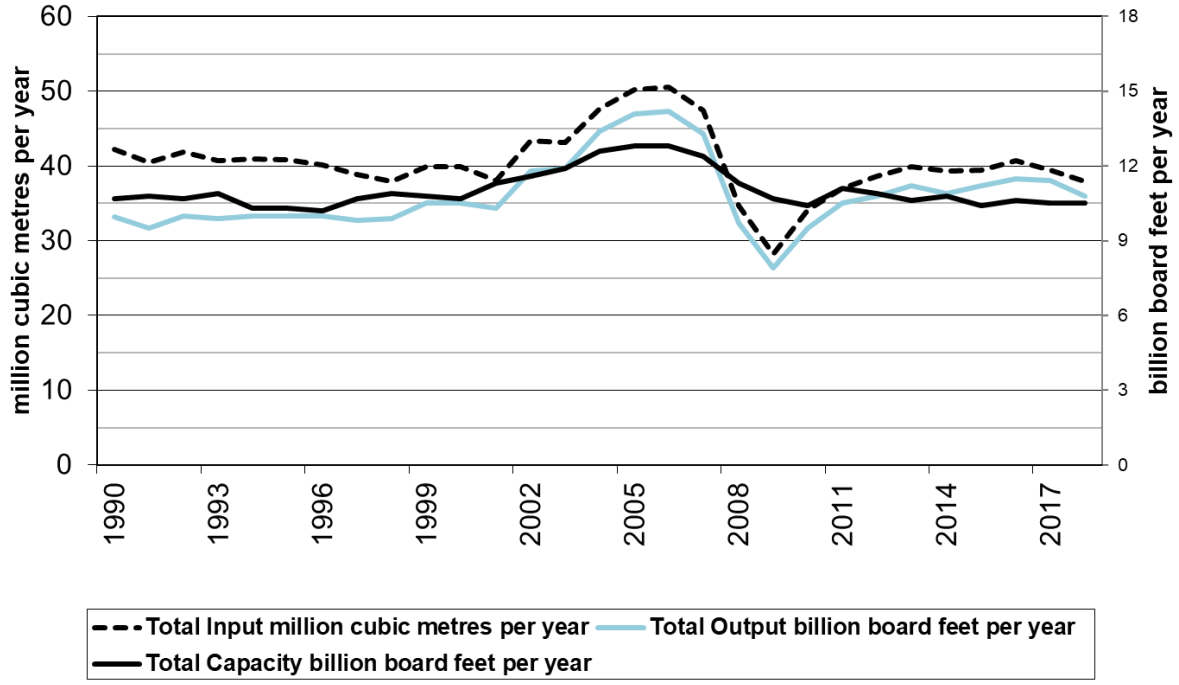


Figure 7: B.C. Lumber Mills (at least 40 million board feet)
Number of Mills and Average Capacity

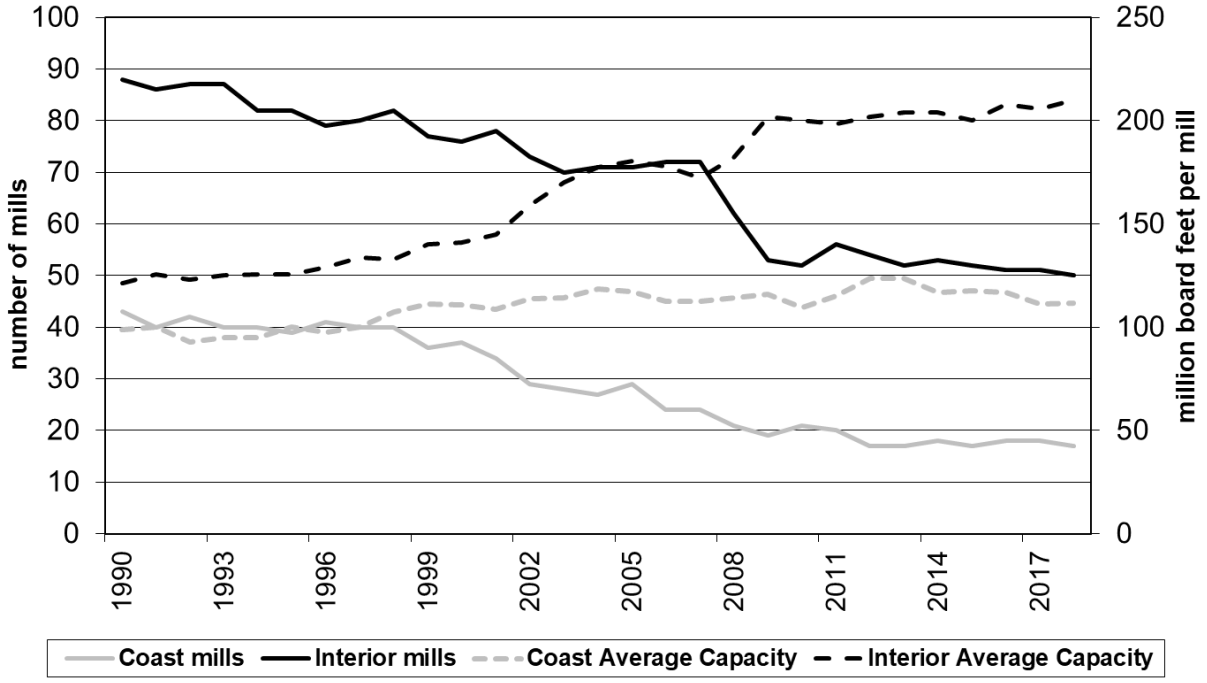


Figure 8: B.C. Lumber Mills (at least 40 million board feet)
Capacity Utilization

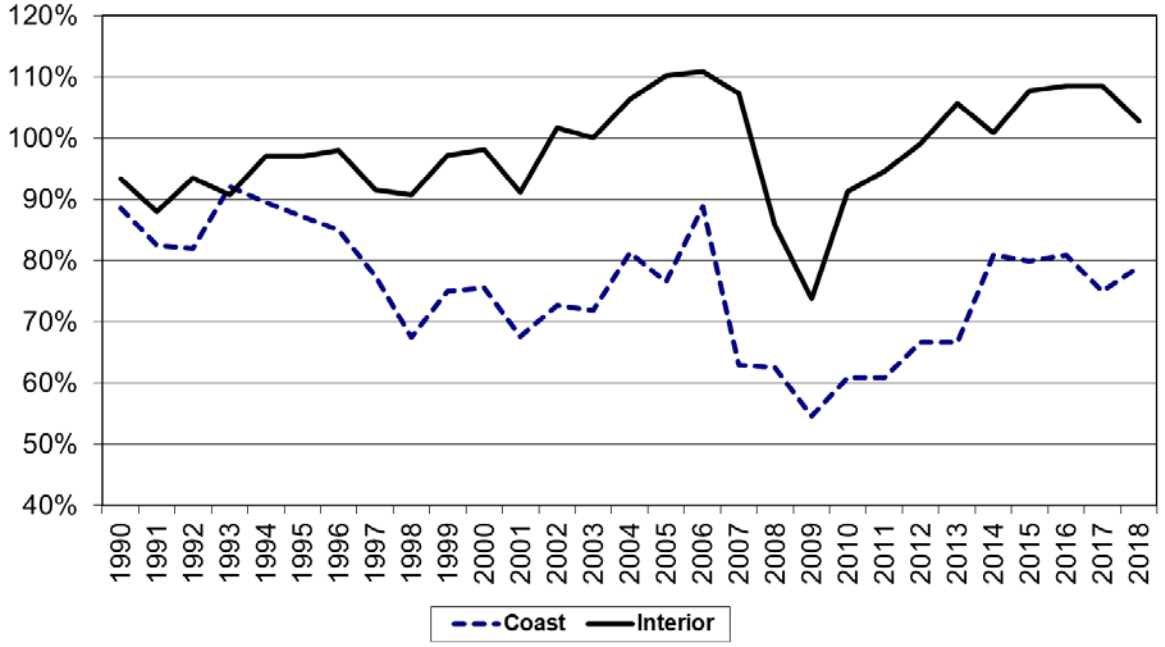
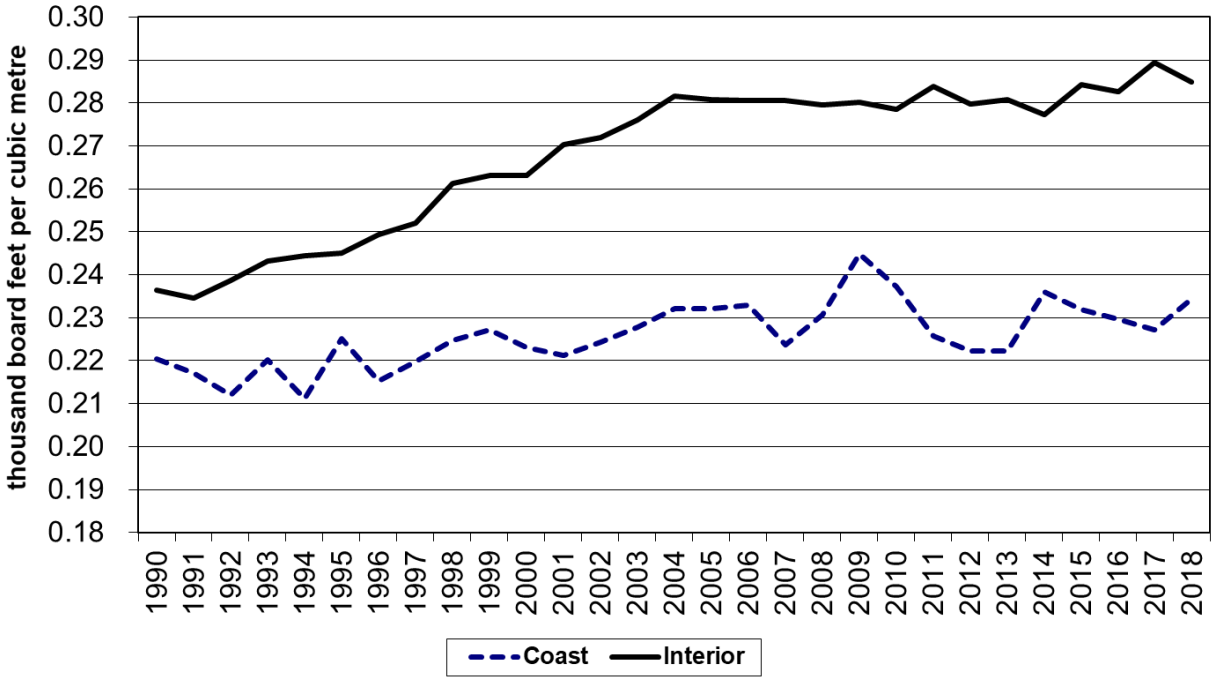


Figure 9: B.C. Lumber Mills (at least 40 million board feet)
Lumber Recovery Factor



2) Veneer and Plywood Mills

Veneer is produced as a thin sheet of wood of uniform thickness by peeling or slicing logs, requiring higher grade logs with no branches. Plywood is produced by gluing and compressing together three or more sheets of veneer, with the grain of alternate sheets usually laid crosswise.[7] Veneer is also used in other engineered wood products such as laminated veneer lumber (LVL).

According to the *2018 Economic State of BC Forest Sector* report, the non-lumber-wood manufacturing sector (including shake and shingles, wood preservation, veneer, plywood and engineered wood products, millwork, container, and pallet manufacturing and other activities) accounted for 46% of wood product manufacturing sales and more than 47% of employment in 2018. Most non-lumber products were consumed domestically.

Number of Mills

As shown in Table 3, in 2018, there were 12 veneer mills operating in the province.[8] Seven veneer mills had on-site plywood operations. Three veneer mills were on the coast and nine mills were in the southern interior.

Mill Input, Capacity Utilization, and Recovery

- As presented in Figure 10, the total log input to veneer mills has decreased from 2006 to 2010 and has increased in the period of 2012 - 2018. In 2018, veneer mills consumed 4.7 million m^3 of logs, representing a 31% increase from 2012.
- With the growing demand for veneer products in global markets, veneer mills in BC operate 40% above their capacities (Figure 12). In 2018, the capacity utilization rate was 145%, reflecting an average operating level of three-shifts per day.
- Figure 13 presents that the average recovery factor steadily declined from 2013 to 2016 and rebounded 2017-2018.

[7] Source: Statistics Canada: https://strategis.ic.gc.ca/app/scr/sbms/sbb/cis/definition.html?code=32121&lang=eng
[8] Small mills using an average of less than 25,000 m3 of logs per year were not included in these statistics.

Table 3: British Columbia Veneer Mill Summary Statistics

		1990…	1995…	2000...	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	% change 1990-2018
Number of Mills		20	17	16	17	16	15	13	12	10	11	11	11	11	11	12	12	12	-40%
Total Capacity	(billion square feet 3/8" basis)	2.1	2.1	2.0	2.6	2.5	2.3	2.0	1.9	1.8	2.0	1.7	1.7	1.7	1.7	1.9	1.9	2.0	-5%
Total Output	(billion square feet 3/8" basis)	2.3	2.4	2.6	3.7	3.3	2.9	2.3	1.9	2.0	2.2	2.2	2.4	2.4	2.5	2.8	2.9	2.9	26%
Total Log Input	(million cubic metres)	4.4	4.1	4.4	6.3	5.7	5.1	4.0	3.4	3.6	3.8	3.6	3.8	3.9	4.1	4.9	4.8	4.7	7%
Average Capacity	(million square feet per mill)	105	124	125	153	156	153	154	158	180	182	155	155	155	155	158	158	167	59%
Capacity Utilization	(output divided by capacity)	110%	114%	130%	142%	132%	126%	115%	100%	111%	110%	129%	141%	141%	147%	147%	153%	145%	32%
Recovery Factor	(square feet per cubic metre log input)	523	585	591	587	579	569	575	559	556	579	611	632	615	610	571	604	617	18%

Source: Major Primary Timber Processing Facilities in British Columbia, ministry database, various years

Notes:

Output Capacity is estimated based on two 8 hour shifts, 240 days per year.

Small mills using an average of less than 25,000 cubic metres of logs per year are not included in these statistics.

Figure 10: B.C. Veneer Mills
Capacity, Output and Log Input*

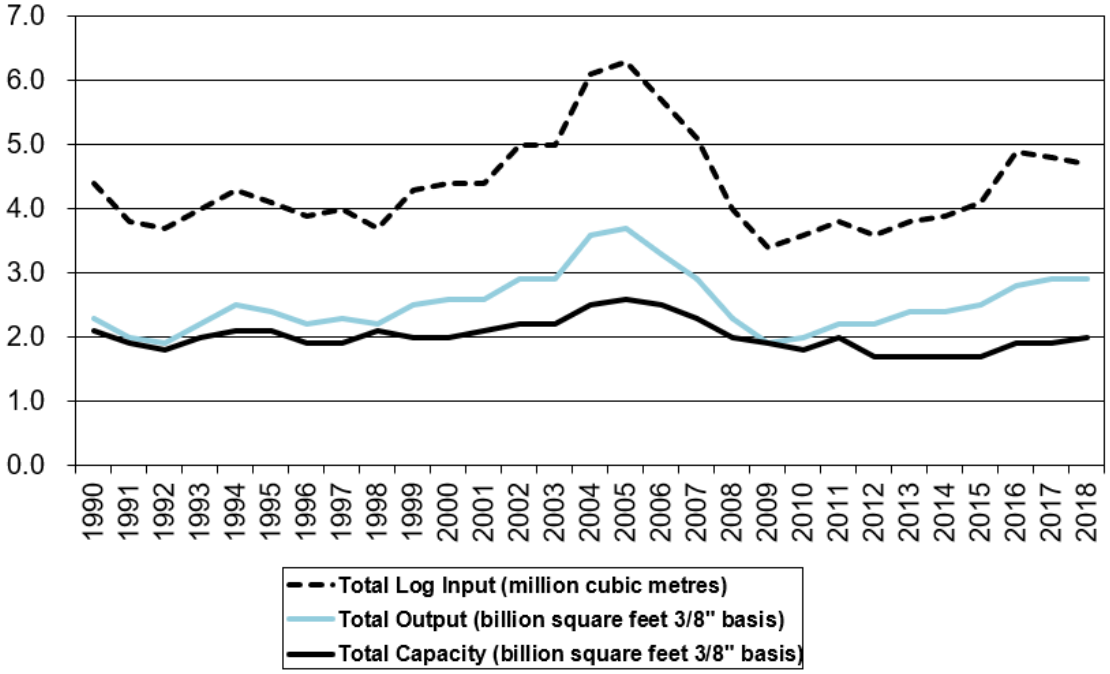


Figure 11: B.C. Veneer Mills
Number of Mills and Average Capacity

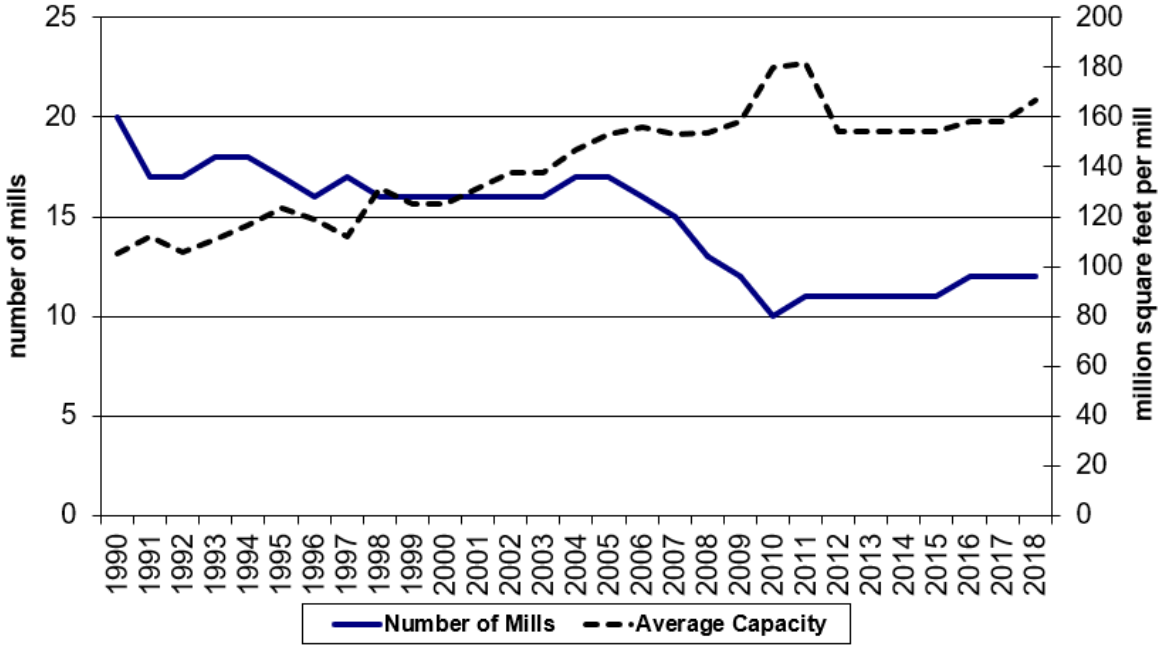


Figure 12: B.C. Veneer Mills
Capacity Utilization

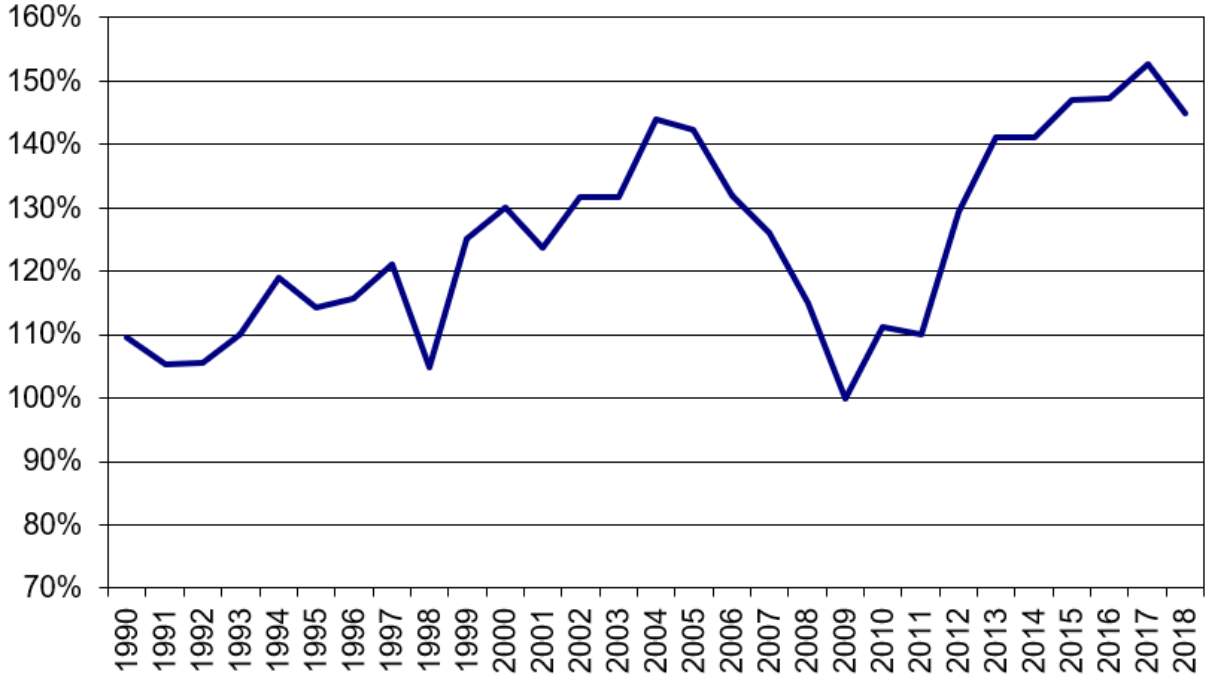
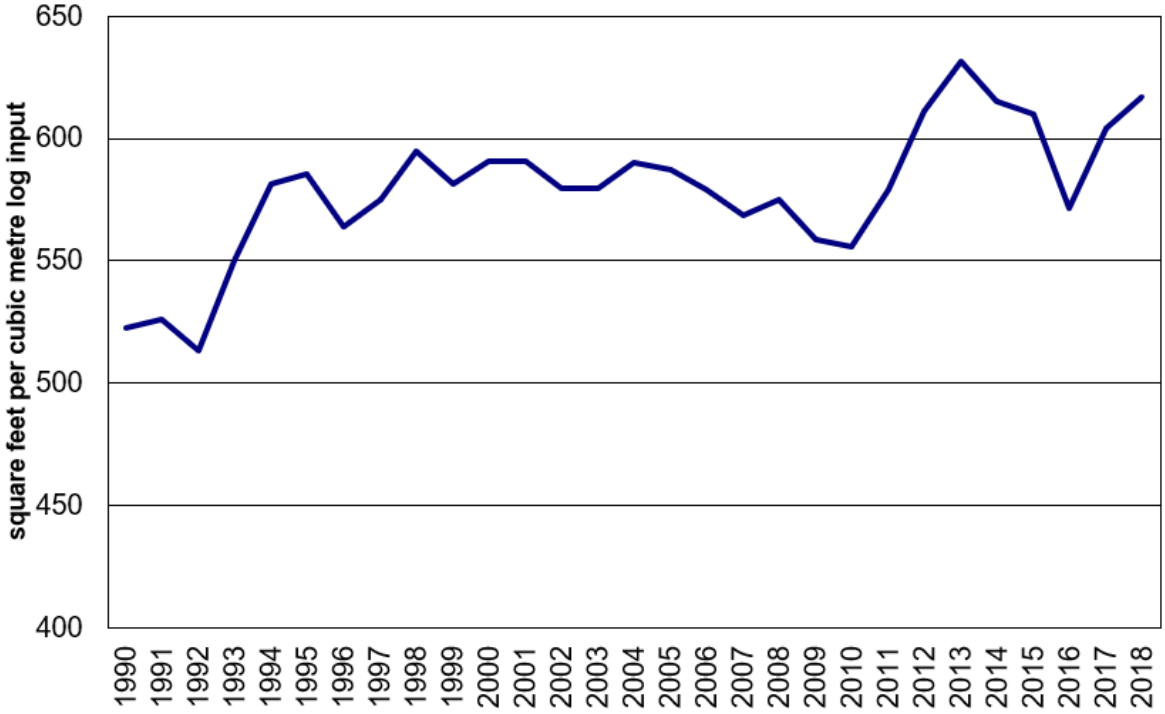


Figure 13: B.C. Veneer Mills
Recovery Factor



3) Pulp and Paper Mills

Pulp is used primarily as a raw material for paper and paperboard products, packaging as well as personal hygiene products and rayon. The main pulp products are bleached softwood kraft pulp (BSK) and chemi-thermo-mechanical pulp (CTMP). Most of the paper produced in BC is newsprint.

The pulp and paper manufacturing sector makes a significant contribution to the forest industry in BC. In 2018, the pulp and paper manufacturing sales were $5.4 billion, of which 61% (or $3.6 billion) came from the pulp sector. In the worldwide context, BC's total pulp export value was $4.2 billion. China held a dominant share of total pulp exports (60%), followed by the US (10%), Japan (6%). Bleached softwood kraft pulp dominated the pulp export.[9] In 2018, paper and paperboard sales were up 17% and converted paper was up 3.5%.[10]

Number of Mills, Capacity, Input, and Capacity Utilization

Pulp Mills

- As can be seen in Table 4,15 pulp mills operated in 2018 with five mills on the coast and 10 mills in the interior.
- Figure 14 demonstrates that the provincial pulp mill capacity has dropped by 17% since 2009 due to mill closures. In 2018, the total pulp capacity was 5.26 million tonnes, representing a 2% increase from 2017. Some pulp mills have started innovations and new product development.[11]
- Figure 14.1 shows the pulp mill capacity allocation in the province. In 2018, about 35% of the provincial pulp mill capacity accumulated in the South Coast (12%) and West Coast (23%) natural resource regions on the coast. Approximately 40% of the provincial pulp mill capacity accumulated in the Omineca (27%) and Cariboo (13%) natural resource regions in the interior.
- The total input has declined in the period of 2000-2009 and has grown slowly after the recession. With a shrinking residual chip supply to the pulp sector in BC, the amount of whole-log chips consumed by pulp mills has increased in recent years. As noted earlier, the provincial whole-log chip consumption was 6.2 million cubic metres in 2018, which had not been seen in the last ten years.
- As shown in Figure 15, pulp mills ran at 96% of their capacities in 2018, mainly due to the increased demand for pulp products in Asian markets.

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[9] Source: Statistics Canada

[10] Source: Statistics Canada and the *2018 Economic State of the BC Forest Sector* report*.* Converted paper includes products created from purchased paper and paperboard.

[11] Performance Bio-Filaments Ltd. is a joint venture, established in 2014 between Resolute Forest Products and Mercer. The company is dedicated to the technical and market development of new and novel applications for Nanofibrillated Cellulose (NFC) and produces a small-scale of Cellulose Filaments (CF).

Paper Mills

- Table 4 demonstrates that five paper mills operated in 2018. Four of them operated on pulp mill sites.
- The rise of electronic media resulted in a decline of paper-based communication products. Figure 16 illustrates that total capacity and output of paper mills have continued to decline over the past decade. Some paper mills have started to diversify their paper grades to types other than only newsprint.
- Figure 16.1 shows the paper mill capacity allocation in the province. In 2018, 85% of the provincial paper mill capacity was on the coast and 15% of the capacity was in the interior.
- As illustrated in Figure 17, the capacity utilization has stayed above 85% from 2010 onwards. Increase in capacity utilization in the past three years was mainly a result of the capacity reduction in the sector.

Hog Fuel Consumption

Hog fuel is a fibre by-product of the sawmill process that includes bark and wood waste. It is typically ground up to produce a fuel for pulp and paper mills and other biomass consumers. The Ministry started surveying pulp mills for their hog fuel consumption in 2017. In 2018, the reported hog fuel consumption was about five million cubic metres, representing a 7% decrease from 2017.[12]

[12] The number of firms reported their hog fuel consumption is believed to be below the actual number.

Table 4: British Columbia Pulp and Paper Mill Summary Statistics

		1991…	1995…	2000...	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	% change 1991-2018
Number of Pulp Mills		24	24	23	22	21	21	19	19	18	18	18	16	16	17	15	15	15	-38%
Total Capacity	(million tonnes)	8.42	8.21	7.84	7.42	7.42	6.84	6.36	6.33	5.96	6.02	5.87	5.66	5.64	5.85	5.21	5.17	5.26	-38%
Total Output	(million tonnes)	6.68	7.30	7.56	7.09	7.08	6.51	5.85	5.27	5.49	5.76	5.80	5.50	5.63	5.69	5.20	5.18	5.05	-24%
Total Fibre Input	(million bone dry units)	11.76	12.75	13.44	12.36	11.79	10.96	10.12	8.87	8.29	10.13	9.65	9.29	9.62	9.59	9.08	9.21	8.84	-25%
Average Capacity	(thousand tonnes)	351	342	341	337	353	326	335	333	331	334	326	354	352	344	348	345	350	-2%
Average Fibre Input	(thousand bone dry units)	490	531	584	562	562	522	532	467	461	563	536	581	601	564	606	614	589	25%
Capacity Utilization		79%	89%	96%	96%	95%	95%	92%	83%	92%	96%	99%	97%	100%	97%	100%	100%	96%	26%
Number of Paper Mills		12	11	11	11	11	9	9	8	6	6	6	5	6	6	5	5	5	-58%
Total Capacity	(million tonnes)	3.47	3.06	3.27	2.98	3.19	2.86	2.84	2.52	1.52	1.52	1.57	1.38	1.61	1.49	1.26	1.24	1.14	-64%
Total Output	(million tonnes)	2.74	2.75	3.17	3.02	3.04	2.55	2.42	2.03	1.49	1.48	1.49	1.30	1.48	1.29	1.15	1.15	1.14	-58%
Average Capacity	(thousand tonnes)	289	278	297	271	290	318	315	315	253	253	261	275	268	248	252	249	228	-14%
Capacity Utilization		79%	90%	97%	101%	95%	89%	85%	81%	98%	98%	95%	94%	92%	87%	91%	92%	100%	17%

Source: Major Primary Timber Processing Facilities in British Columbia, ministry database, various years

Notes:

Estimated annual capacity is based on a standardized operation of 345 operating days per year, one 24-hour shift per day. Actual operations may vary from this schedule.

Pulp mills included in these statistics are those that use wood fibre input.

Historical data for some pulp mills have been adjusted to reflect new information received in 2019.

Figure 14: B.C. Pulp Mills Capacity, Output and Input

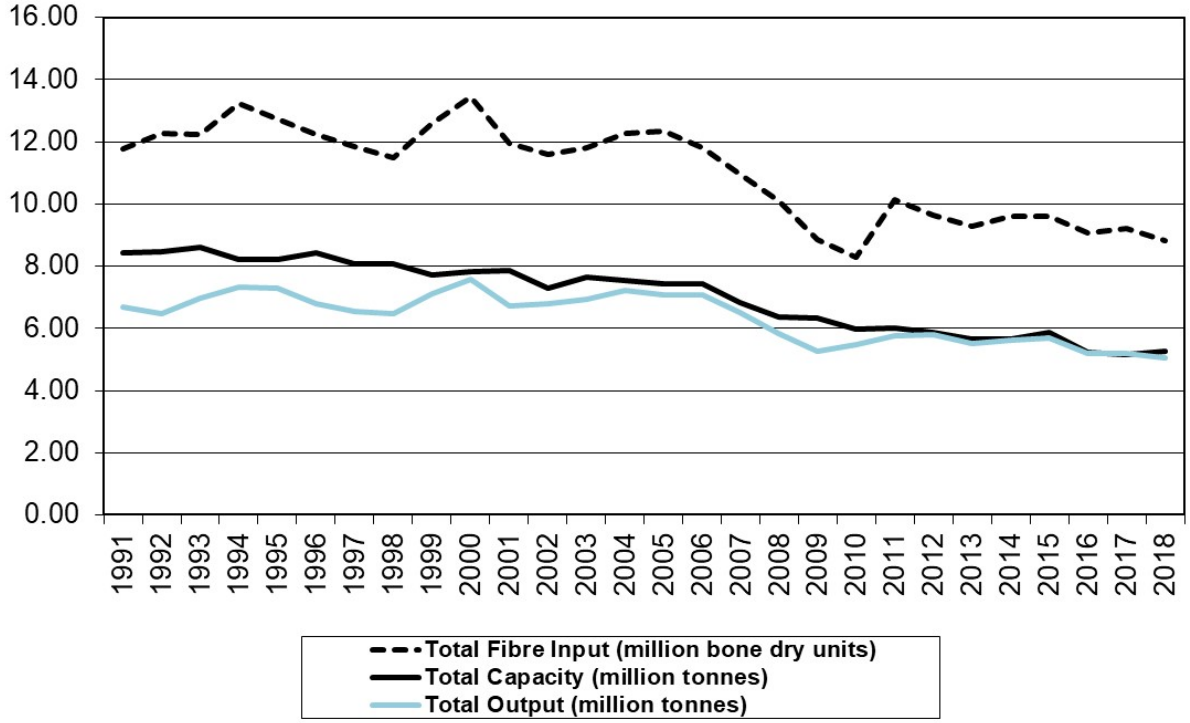


Figure 14.1: Active Pulp Mill Output Capacity in 2018

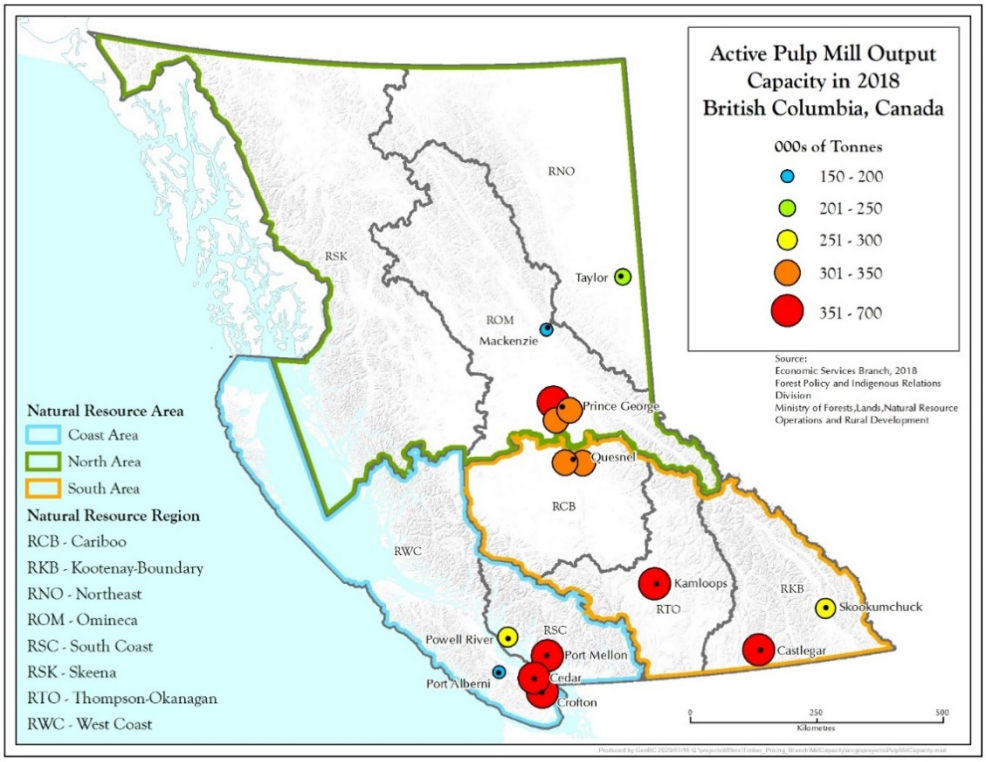


Figure 15: B.C. Pulp Mills Capacity Utilization

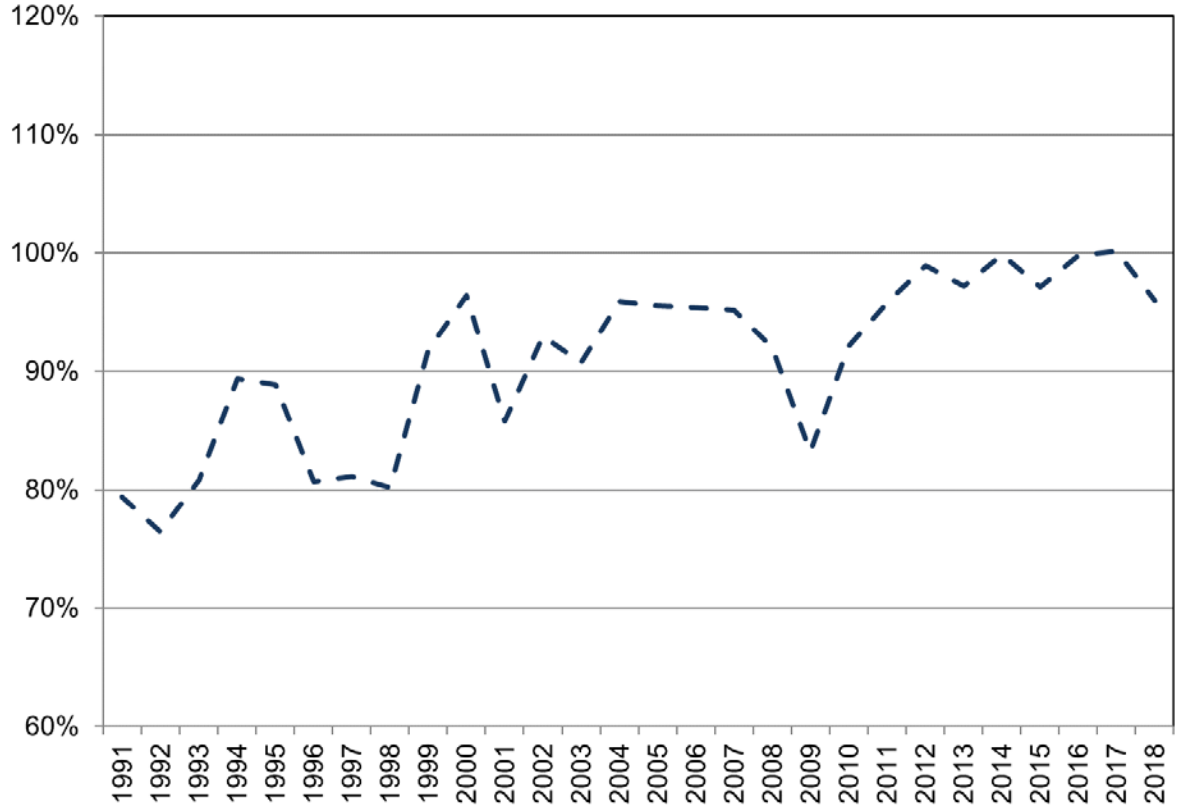


Figure 16: B.C. Paper Mills Capacity and Output

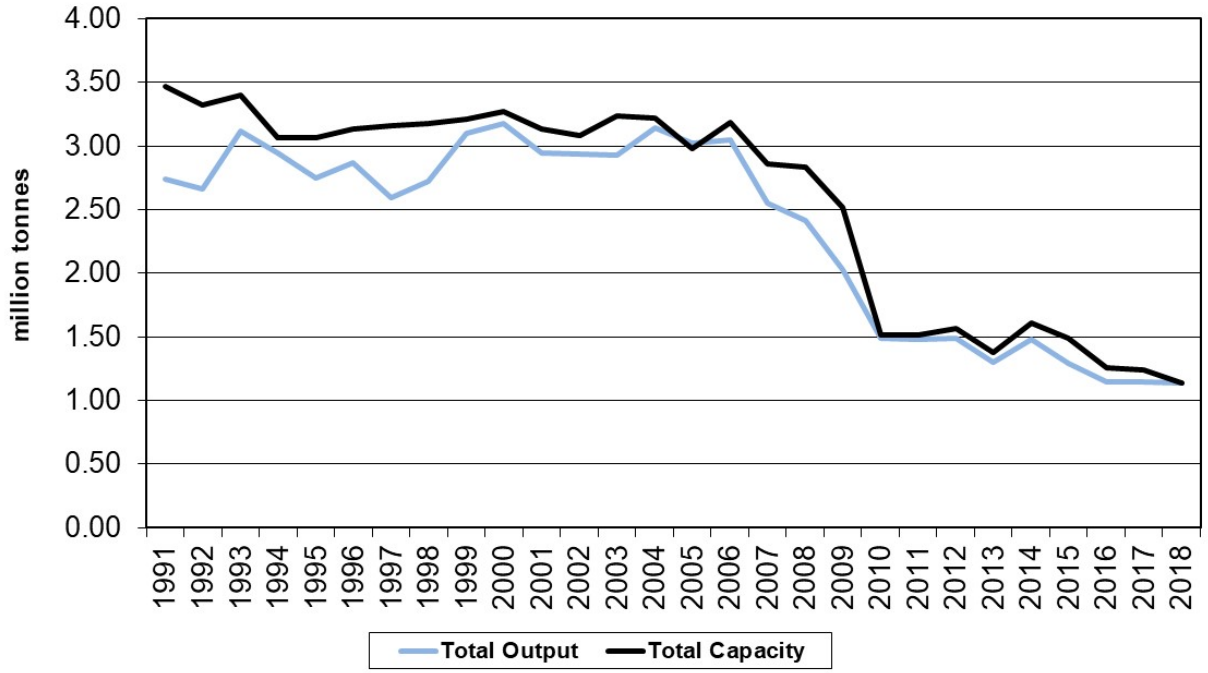


Figure 16.1: Active Paper Mill Output Capacity in 2018

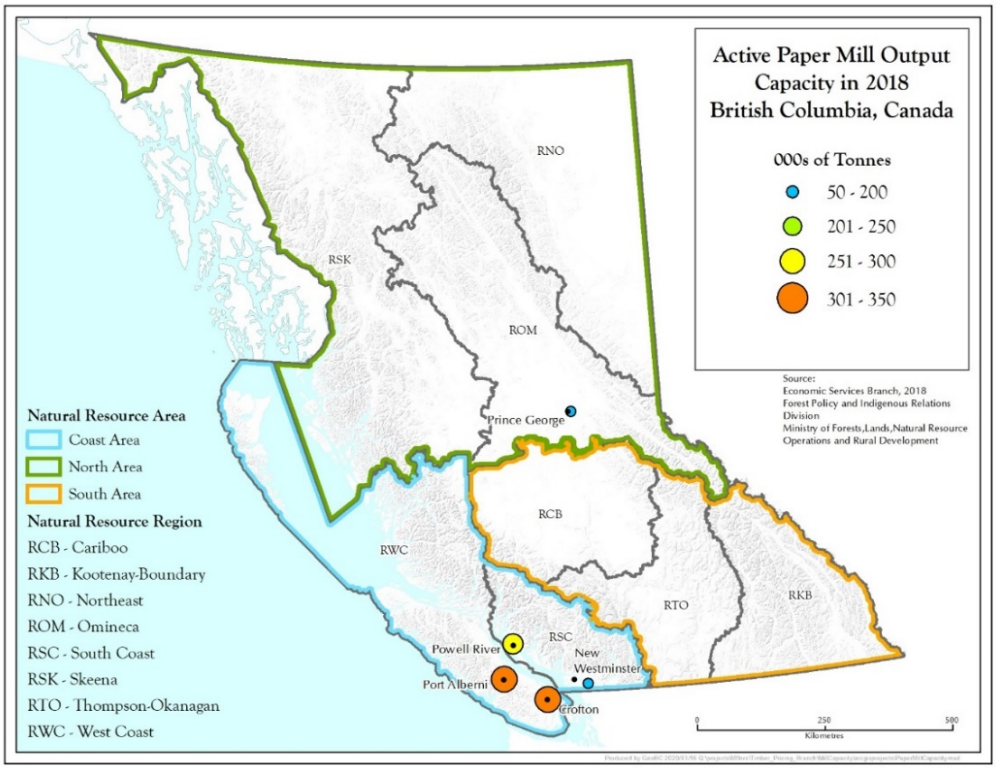
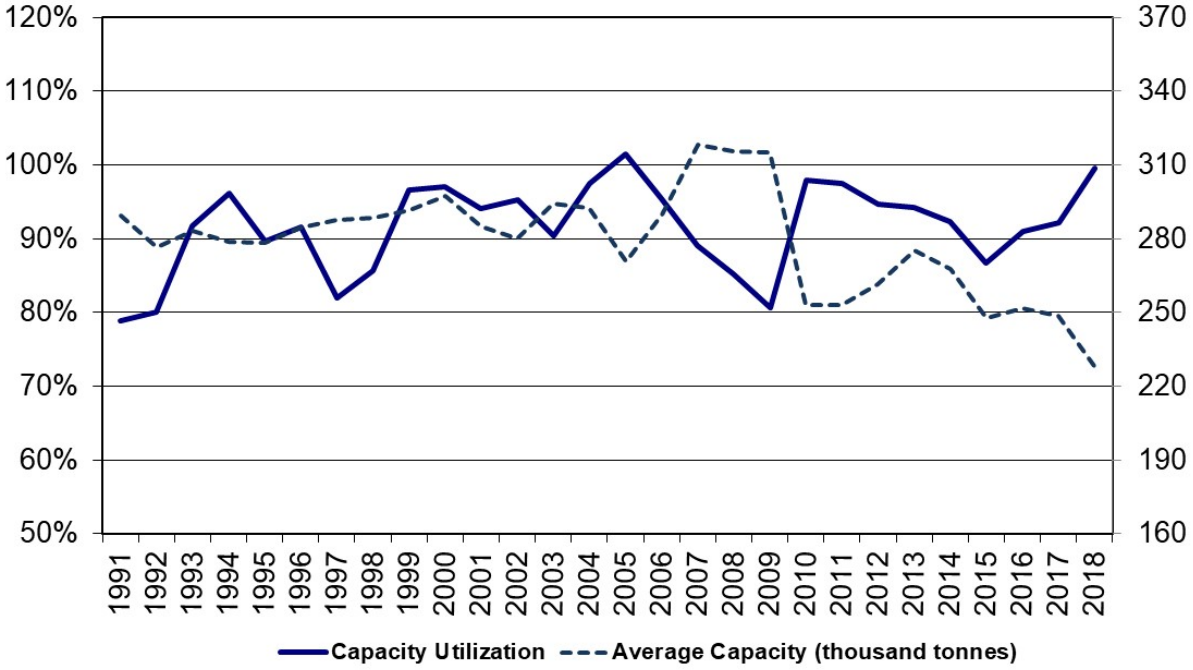


Figure 17: B.C. Paper Mills
Capacity Utilization and Average Capacity



4) Pellet Mills

Wood pellets are primarily used as wood fuel and may also be used in niche markets such as animal bedding. Pellets are made from compacting fibre, usually sawdust, into the desired pellet diameter and length. Pellets are predominantly made from sawmill residues.

In 2018, the BC wood pellet export value grew nearly $100 million, from $311 million in 2017 to $408 million in 2018. This was mainly driven by an increase in export volume, which grew from 1.8 million tonnes in 2017 to 2.3 million tonnes in 2018. The UK was the primary destination by weight (66%), followed by Japan (27%) and other countries (7%).[13]

Number of Mills, Capacity, Input, Output, Average Capacity, and Utilization

- Spurred by growing pellet markets worldwide, the number of pellet mills increased from 11 in 2012 to 13 in 2018. Pinnacle Renewable Energy Group (Pinnacle) was the largest producer in the province, accounting for nearly 64% of BC's capacity.
- BC pellet capacity has increased by 500,000 tonnes, from 1.67 million tonnes in 2012 to 2.17 million tonnes in 2018. Although long-term demand is expected to stay strong, short-term disruptions can affect the market for BC producers. As shown in Figure 18, BC pellet capacity fell by 89,000 tonnes because Pinnacle closed its Quesnel pellet mill in 2017. In 2018, Pinnacle and its partner, West Fraser, built a new pellet facility on a site previously used for producing particle board facility in Smithers, adding 125,000 tonnes of capacity to the province.
- Capacity increases for plants were matched by output and input increases driven by market demand. Both the output and input have grown by over 30% since 2012.
- The pellet plant size in BC is generally larger than the plant size in other Canadian jurisdictions.[14] In 2018, the average annual capacity of pellet plants in BC was 167,000 tonnes, which was three times more than in Eastern Canada (average capacity of 50,000 tonnes).
- Figure 19 shows that the capacity utilization rate has been close to 100% in recent years, due to efficient infrastructure, including tailored ports and rail to accommodate pellet handling.[15]

[13] Source: *2018 Economic State of the BC Forest Sector*
[14] Wood pellet association
[15] Source: https://www.fpac.ca/wp-content/uploads/2014_CanBio_Report.pdf

Table 5: British Columbia Pellet Mill Summary Statistics

		2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	% change 2005-2018
Number of Mills		5	8	8	9	9	11	11	11	11	12	14	14	13	13	160%
Total Capacity	(million tonnes)	0.36	0.81	0.99	1.07	0.96	1.31	1.99	1.67	1.69	1.77	2.05	2.22	2.13	2.17	492%
Total Output	(million tonnes)	0.36	0.39	0.41	0.79	0.76	1.11	1.36	1.64	1.68	1.65	1.80	2.06	2.08	2.12	478%
Total Input	(million bone dry units)	0.41	0.44	0.47	0.81	0.68	1.13	1.28	1.37	1.58	1.62	1.73	1.92	1.95	1.87	376%
Average Capacity	(000s tonnes)	72	101	124	119	107	119	181	152	154	148	146	159	164	167	128%
Capacity Utilization	(output divided by capacity)	100%	48%	41%	74%	79%	85%	68%	98%	99%	93%	88%	93%	98%	98%	-2%
Recovery Factor	(Tonnes of output per tonne of bone dry input)	0.88	0.89	0.87	0.98	1.12	0.98	1.06	1.20	1.06	1.02	1.04	1.07	1.07	1.13	21%

Source: Major Primary Timber Processing Facilities in British Columbia, ministry database, various years
Notes:
Output Capacity is estimated based on three 8-hour shifts, 345 days per year.
Historical data may be adjusted to reflect the new information received in 2019.

Figure 18: B.C. Pellet Mills Capacity and Output

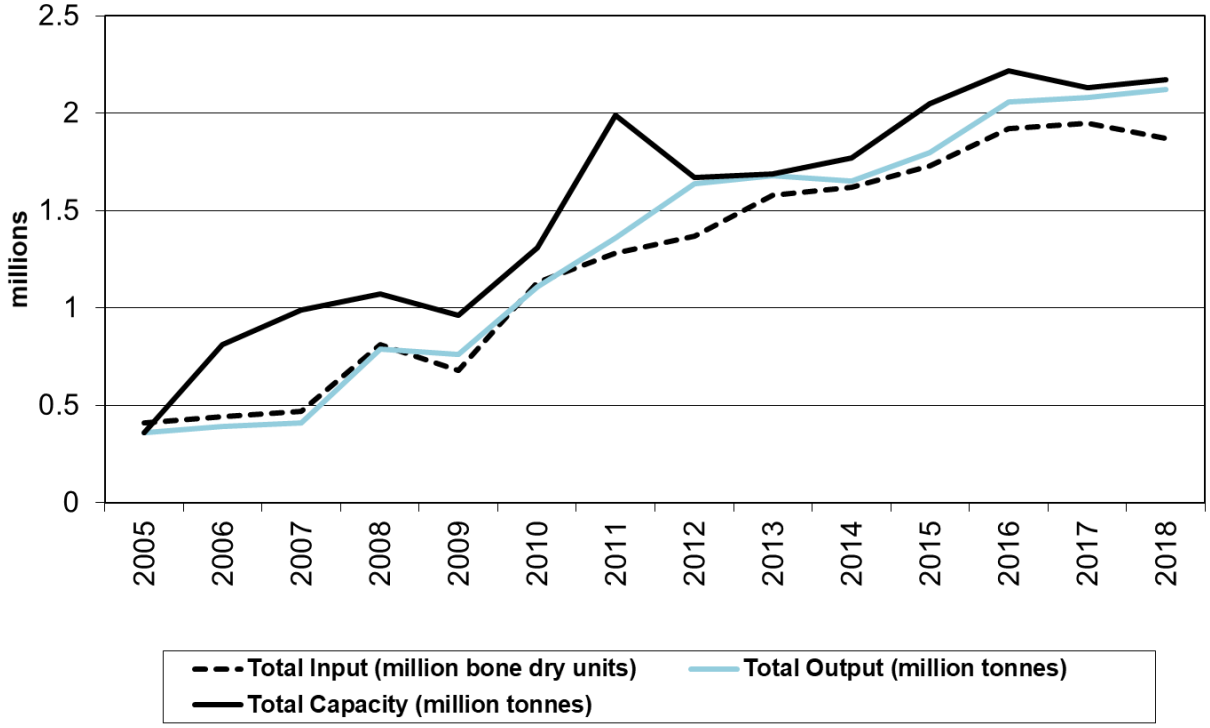
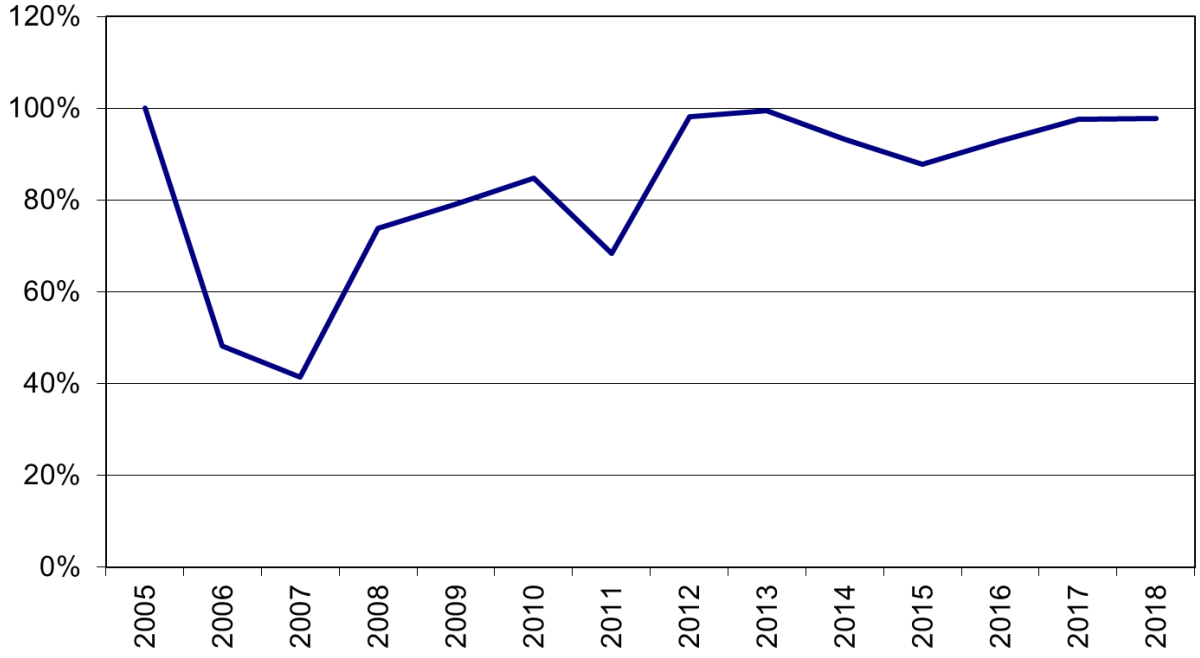


Figure 19: B.C. Pellet Mills Capacity Utilization



5) Shake and Shingle Mills

The shake and shingle industry comprises mills primarily engaged in sawing and/or splitting blocks of wood to produce shakes and shingles. The main roofing product types include handsplit and resawn shakes as well as tapersawn shakes and shingles. A wide variety of sidewall shingle products are also produced.[16] The usual commercial unit of measurement for shakes and shingles is a "square," the quantity required to cover 100 square feet of surface area.

The total manufacturing sales for shake and shingle products have increased sharply by roughly 60%, from $546 million in 2017 to $851 million in 2018 due to product price increases in the second half of 2018.[17] The province exported $168-million shake and shingle products to foreign countries.[18]

Number of Mills, Capacity, Input, Output, Utilization, and Employment

- Figure 20 shows that shakes and shingles have been produced by fewer firms each year since 1991. The number of firms declined from 68 in 1991 to 35 in 2018.
- In 2018, 32 coastal shake and shingle producers operated on the coast, accounting for 98% of the provincial capacity. Three producers operated in the interior, accounting for 2% of the provincial capacity.
- The declining number of mills reduced production capacity. As shown in Figure 20, the shake and shingle production capacity decreased 69%, from 4.7 million squares in 1991 to 1.8 million squares in 2018.[19]
- Mill capacity declines are accompanied by input and output decreases. Figure 21 shows that the shake and shingle production declined from 2.5 million squares in 1991 to 772,000 squares in 2018. The log input (mainly cedar) fell by 64%, from 1.5 million m^3 in 1991 to 549,000 m^3 in 2018.
- As shown in Figure 22 the capacity utilization has fluctuated between 30% and 60%. As the cedar log supply declines on the coast, the competition for cedar logs has caused supply tightness for shake and shingle producers, resulting in low capacity utilization (less than 50%) in the past two years.
- As can be seen in Figure 23, although most shake and shingle mills are small to medium sized producers, they create the highest employment per thousand cubic metres of fibre input compared to other wood manufacturing sectors in the province.

[16] Source: The Cedar Shake and Shingle Bureau
[17] Source: StatsCan
[18] Source: BC Stats
[19] The Ministry did not survey shake and shingle mills in 2009-2013

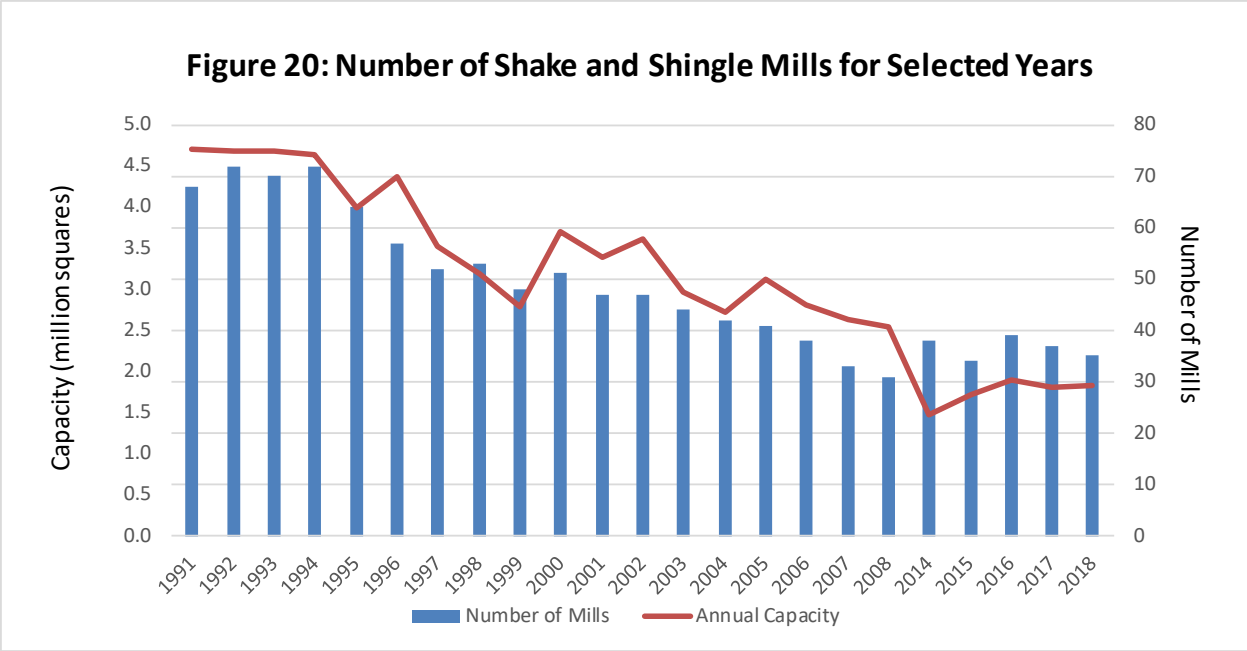


Figure 20: Number of Shake and Shingle Mills for Selected Years
Capacity (million squares)
Number of Mills
5.0
4.5
4.0
3.5
3.0
2.5
2.0
1.5
1.0
0.5
0.0
80
70
60
50
40
30
20
10
0
1991
1992
1993
1994
1995
1996
1997
1998
1999
2000
2001
2002
2003
2004
2005
2006
2007
2008
2014
2015
2016
2017
2018
Number of Mills
Annual Capacity

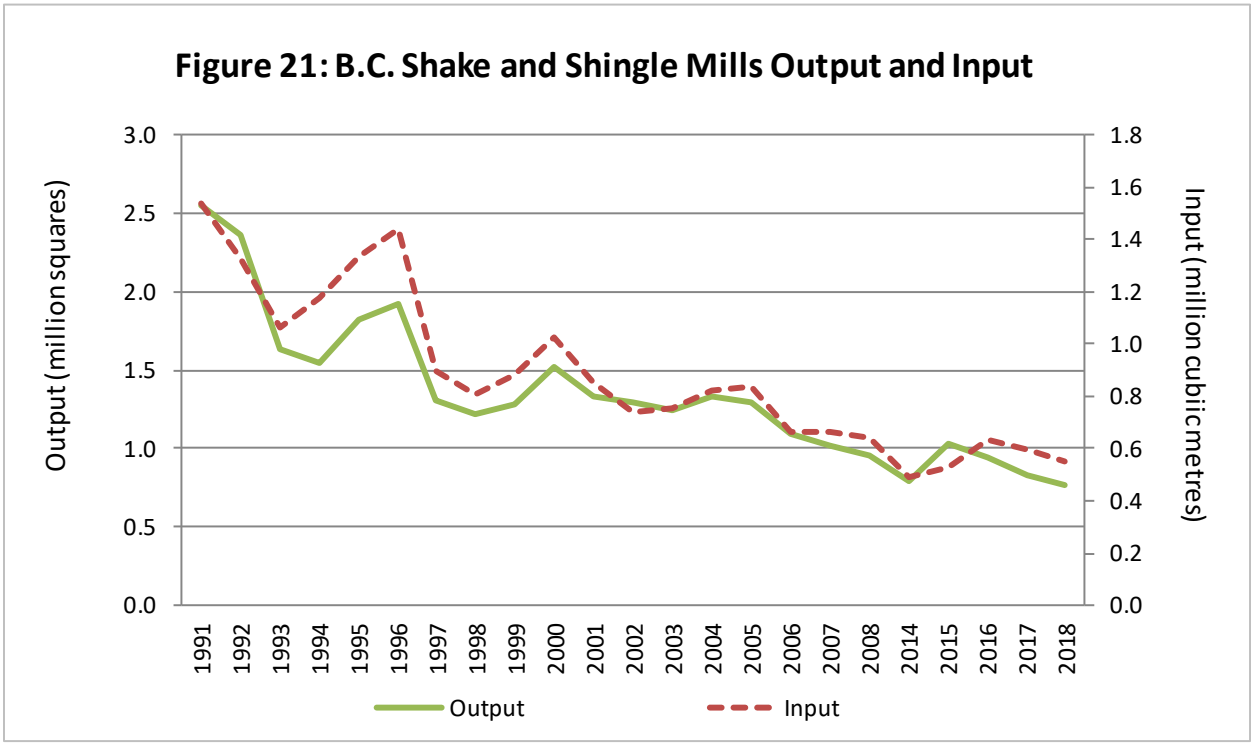


Figure 21: B.C. Shake and Shingle Mills Output and Input
Output (million squares)
Input (million cubic metres)
3.0
2.5
2.0
1.5
1.0
0.5
0.0
1.8
1.6
1.4
1.2
1.0
0.8
0.6
0.4
0.2
0.0
1991
1992
1993
1994
1995
1996
1997
1998
1999
2000
2001
2002
2003
2004
2005
2006
2007
2008
2014
2015
2016
2017
2018
Output
Input

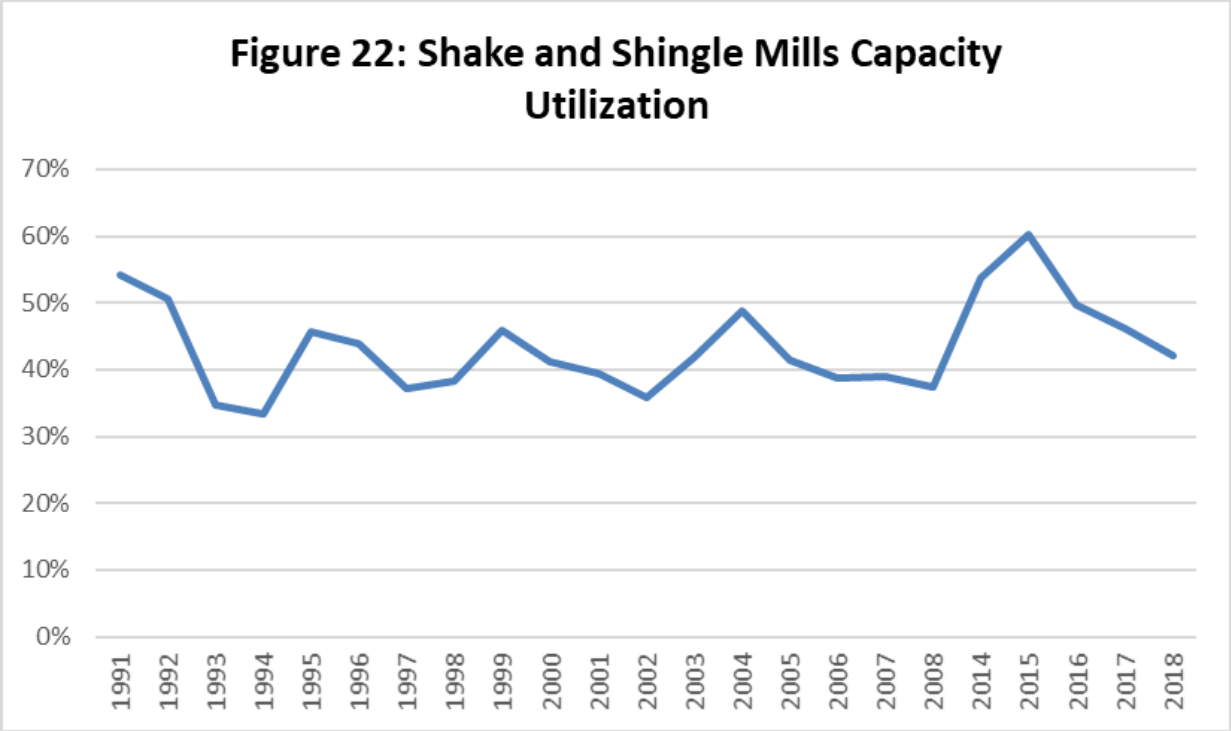


Figure 22: Shake and Shingle Mills Capacity Utilization
70%
60%
50%
40%
30%
20%
10%
0%
1991
1992
1993
1994
1995
1996
1997
1998
1999
2000
2001
2002
2003
2004
2005
2006
2007
2008
2014
2015
2016
2017
2018

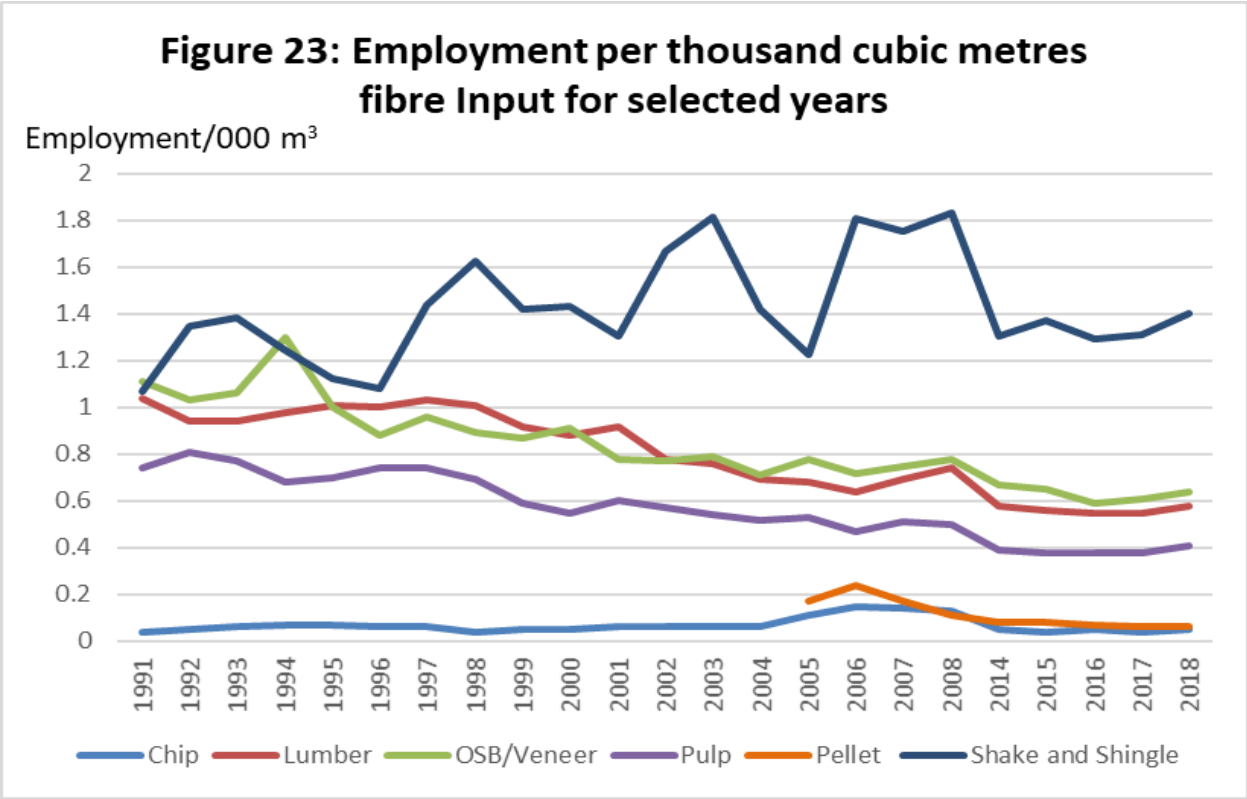


Figure 23: Employment per thousand cubic metres fibre Input for selected years
Employment/000 m³
2
1.8
1.6
1.4
1.2
1
0.8
0.6
0.4
0.2
0
1991
1992
1993
1994
1995
1996
1997
1998
1999
2000
2001
2002
2003
2004
2005
2006
2007
2008
2014
2015
2016
2017
2018
Chip
Lumber
OSB/Veneer
Pulp
Pellet
Shake and Shingle

Related References

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Pulp and Paper Product Council
www.pppc.org

Wood Pellet Association of Canada
http://www.pellet.org/

Appendix: List of Mills

Figure 24: Administrative Areas and Natural Resource District Boundaries in 2018

Lumber Mills

(Listed Alphabetically by Company)

Mills producing lumber are provided in separate tables, one for those with the estimated annual capacity above 40 million board feet of lumber, and one for those below.

The annual capacity reported in the following tables is estimated based on the same standard operating assumption for each mill (i.e. number and length of shifts and days per year as described below). Actual mill production can be higher or lower than estimated capacity if a mill runs on a different operating schedule than assumed here. Therefore, while capacity provides guidance on mill output, it is not a measure of the actual production level of the mill. For more information, please contact Mill.Survey@gov.bc.ca.

Notes:

1. Estimated annual capacity is established on a standardized operation of 240 days per year, two 8-hour shifts per day. Actual mill operations may vary from this schedule.

2. Administrative areas and natural resource districts were applied (see Figure 24 for details).

3. The List of Lumber Mills is available as an Excel spreadsheet online at: https://www2.gov.bc.ca/gov/content/industry/forestry/competitive-forest-industry/forest-industry-economics/fibre-mill-information/major-timber-processing-facilities-survey

LUMBER MILLS WITH CAPACITY GREATER THAN 40 MILLION BOARD FEET OF LUMBER IN 2018

Mill Number	Company	Location of Mill	Administrative Area	Natural Resource District	Estimated Annual Capacity (million board feet)
137	Apollo Forest Products Ltd.	Fort St James	North	Fort St. James	125
498	Aspen Planers Ltd.	Merritt	South	Cascades	192
213	Babine Forest Products Ltd. (Hampton)	Burns Lake	North	Nadina	224
252	C & C Wood Products Ltd.	Quesnel	South	Quesnel	43
193	Canadian Forest Products Ltd.	Houston	North	Nadina	439
82	Canadian Forest Products Ltd.	Elko	South	Rocky Mountain	217
90	Canadian Forest Products Ltd.	Radium Hot Spr	South	Rocky Mountain	200
160	Canadian Forest Products Ltd.	Bear Lake	North	Prince George	263
130	Canadian Forest Products Ltd.	Mackenzie	North	Mackenzie	320
166	Canadian Forest Products Ltd.	Prince George	North	Prince George	344
140	Canadian Forest Products Ltd.	Engen	North	Vanderhoof	473
64	Canadian Forest Products Ltd.	Vavenby	South	Thompson Rivers	211
127	Canadian Forest Products Ltd.	Chetwynd	North	Peace	222
122	Canadian Forest Products Ltd.	Fort St John	North	Peace	425
93	Canadian Forest Products Ltd.	Wynndel	South	Selkirk	66
135	Canadian Forest Products Ltd.	Isle Pierre	North	Prince George	200
150	Carrier Lumber Ltd.	Prince George	North	Prince George	305
133	Conifex Timber Inc.	Fort St James	North	Fort St. James	280
129	Conifex Timber Inc.	Mackenzie	North	Mackenzie	216
181	Decker Lake Forest Products (Hampton)	Burns Lake	North	Nadina	79
326	Delta Cedar Sawmill LP	Delta	Coast	Chilliwack	52
45	Downie Timber Ltd.	Revelstoke	South	Selkirk	115
158	Dunkley Lumber Ltd.	Strathnaver	North	Prince George	528
86	Galloway Lumber Co. Ltd.	Galloway	South	Rocky Mountain	55
66	Gilbert Smith For Prod Ltd.	Barriere	South	Thompson Rivers	73
537	Goldwood Industries Ltd.	Richmond	Coast	Chilliwack	48
14	Gorman Bros Lumber Ltd.	Westbank	South	Okanagan Shuswap	132
1005	Halo Sawmill Manufacturing LP	Pitt Meadows	Coast	Chilliwack	49
30	International Forest Products Ltd.	Grand Forks	South	Selkirk	163
297	International Forest Products Ltd.	Hammond	Coast	Chilliwack	131
283	International Forest Products Ltd.	Delta	Coast	Chilliwack	126
70	International Forest Products Ltd.	Adams Lake	South	Thompson Rivers	342
62	International Forest Products Ltd.	Castlegar	South	Selkirk	203
88	J H Huscroft Ltd.	Erickson	South	Selkirk	46
100	J.S. Jones	Surrey	Coast	Chilliwack	192
50	Kalesnikoff Lumber Co. Ltd.	Thrums	South	Selkirk	88
149	Lakeland Mills Ltd	Prince George	North	Prince George	143
1000	Ledcor	Chilliwack	Coast	Chilliwack	76
144	Nechako Lumber Co.	Vanderhoof	North	Vanderhoof	240
618	North Enderby Timber Ltd.	Enderby	South	Okanagan Shuswap	64

LUMBER MILLS WITH CAPACITY GREATER THAN 40 MILLION BOARD FEET OF LUMBER IN 2018

Mill Number	Company	Location of Mill	Administrative Area	Natural Resource District	Estimated Annual Capacity (million board feet)
626	Porcupine Wood Products Ltd.	Salmo	South	Selkirk	48
183	ROC Holdings	Terrace	North	Coast Mountain	84
454	S & R Sawmills Ltd.	Surrey	Coast	Chilliwack	223
750	Sigurdson Forest Products	Williams Lake	South	Cariboo Chilcotin	72
539	Stag Timber Ltd.	Surrey	Coast	Chilliwack	86
396	Terminal Forest Products Ltd.	Vancouver	Coast	Chilliwack	43
540	Terminal Forest Products Ltd.	Richmond	Coast	Chilliwack	245
20	Tolko Industries Ltd.	Lavington	South	Okanagan Shuswap	250
68	Tolko Industries Ltd.	Armstrong	South	Okanagan Shuswap	211
107	Tolko Industries Ltd.	Williams Lake	South	Cariboo Chilcotin	171
98	Tolko Industries Ltd.	Quesnel	South	Quesnel	188
67	Tolko Industries Ltd.	Kelowna	South	Okanagan Shuswap	185
31	Vaagen Fibre Canada	Midway	South	Selkirk	125
552	West Fraser Mills Ltd.	Chetwynd	North	Peace	294
114	West Fraser Mills Ltd.	Williams Lake	South	Cariboo Chilcotin	239
532	West Fraser Mills Ltd.	LeJac	North	Vanderhoof	247
113	West Fraser Mills Ltd.	Quesnel	South	Quesnel	420
214	West Fraser Mills Ltd.	Clinton	South	100 Mile House	214
95	West Fraser Mills Ltd.	100 Mile House	South	100 Mile House	231
191	West Fraser Mills Ltd.	Smithers	North	Skeena Stikine	256
393	Western Forest Products	Chemainus	Coast	South Island	64
546	Western Forest Products	Duke Point	Coast	South Island	96
376	Western Forest Products	Ladysmith	Coast	South Island	104
528	Western Forest Products	Port Alberni	Coast	South Island	142
320	Western Forest Products	Cowichan Bay	Coast	South Island	103
442	Western Forest Products	Ladysmith	Coast	South Island	168
29	Weyerhaeuser Company Ltd.	Princeton	South	Cascades	190

LUMBER MILLS WITH CAPACITY LESS THAN 40 MILLION BOARD FEET OF LUMBER IN 2018

Mill Number	Company	Location of Mill	Administrative Area	Natural Resource District	Estimated Annual Capacity (million board feet)
9	A.J. Forest Products ltd.	Brackendale	Coast	Sea to Sky	24.72
990	Alan Hyde Sawmill	Sicamous	South	Okanagan Shuswap	7.20
8	Andersen Pacific Forest Products Ltd	Ruskin	Coast	Chilliwack	24.96
643	Bear Lumber Ltd.	Cranbrook	South	Rocky Mountain	3.84
986	Brasier Mill	Masset	Coast	Haida Gwaii	0.48
255	Buff Lumber Ltd.	Westwold	South	Okanagan Shuswap	12.00
117	Continental Pole Ltd.	Pemberton	Coast	Sea to Sky	1.92
377	Coulson Manufacturing Ltd (2017)	Port Alberni	Coast	South Island	31.20
1051	Cowichan Lake Timber	Lake Cowichan	Coast	South Island	3.60
989	Deacoff Bros. Enterprises Ltd.	Kelowna	South	Okanagan Shuswap	0.77
1003	Duz Cho Forest Products	Mackenzie	North	Mackenzie	25.44
1048	E Schuk contracting Ltd.	Tatla Lake	South	Cariboo Chilcotin	0.22
1056	Eaglecrest Enterprises	Port Clements	Coast	Haida Gwaii	1.44
1046	Entzminger Sawmill	Quesnel	South	Quesnel	N/A
301	Errington Cedar Products Ltd.	Errington	Coast	South Island	13.92
714	Franklin Forest Products Ltd.	Port Alberni	Coast	South Island	N/A
1004	Fu So Enterprises Ltd.	Kamloops	South	Thompson Rivers	2.40
32	Gibbs Custom Sawmill	McBride	North	Prince George	1.20
957	Gold Island Forest Products Ltd.	Slocan	South	Selkirk	16.80
567	Green Forest Products Ltd.	Merville	Coast	Campbell River	0.72
1016	Greenslide Cattle Co Ltd	Revelstoke	South	Selkirk	0.96
975	Harold Turner	Pritchard	South	Thompson Rivers	0.82
1006	Harrop-Proctor Forest Products	Nelson	South	Selkirk	1.92
708	Island Pacific Wood Products	Tahsis	Coast	Campbell River	0.96
1058	JCI Touchwood Sawmills	Terrace	North	Coast Mountain	3.60
512	Jemico Enterprises Ltd.	Chemainus	Coast	South Island	N/A
47	Joe Kozek Sawmills Ltd.	Revelstoke	South	Selkirk	9.60
184	Kitwanga Forest Products	Kitwanga	North	Skeena Stikine	33.60
1007	Lake Drive Lumber	Terrace	North	Coast Mountain	0.96
597	Lakeside Timber (2007) Ltd.	Tappen	South	Okanagan Shuswap	16.80
702	Linde Bros Lumber Ltd.	Williams Lake	South	Cariboo Chilcotin	1.68
399	Lois Lumber Ltd	Lang Bay	Coast	Sunshine Coast	5.76
712	Long Hoh Enterprises Canada Ltd	Qualicum Beach	Coast	South Island	26.88
197	McDonald Ranch & Lumber Ltd.	Grasmere	South	Rocky Mountain	6.72
974	Murray Kane Site 6LW	Clinton	South	100 Mile House	N/A
408	Nagaard Sawmills Ltd.	Port Alberni	Coast	South Island	9.60
199	North Star Hardware and Building Supplies Ltd.	Athalmer	South	Rocky Mountain	3.84

Note: N/A – Lack of information to estimate capacities for some DNR mills

LUMBER MILLS WITH CAPACITY LESS THAN 40 MILLION BOARD FEET OF LUMBER IN 2018

Mill Number	Company	Location of Mill	Administrative Area	Natural Resource District	Estimated Annual Capacity (million board feet)
988	Northern Log & Timber	Winfield	South	Okanagan Shuswap	0.96
1010	Pacific Timber	Burns Lake	North	Nadina	19.20
711	Port Hardy Merchandising Ltd.	Port Hardy	Coast	North Island - Central Co	4.80
582	Quadra Island Forest Products Ltd.	Quadra Island	Coast	Campbell River	2.88
905	Rainforest Sawmill	Black Creek	Coast	Campbell River	0.72
271	Rouck Brothers Sawmill Ltd.	Lumby	South	Okanagan Shuswap	3.36
731	SCG Forest Inc.	Courtenay	Coast	Campbell River	2.40
480	Schapol Logging Ltd.	Enderby	South	Okanagan Shuswap	16.80
23	Shannon Lumber	Mission	Coast	Chilliwack	9.60
654	SpikeTop Cedar Ltd.	Port Hardy	Coast	North Island - Central Co	0.48
24	Suncoast Lumber and Milling	Sechelt	Coast	Sunshine Coast	12.00
991	T & N Custom Sawmill	Enderby	South	Okanagan Shuswap	1.44
1023	Take to heart Specialty Wood Product	Revelstoke	South	Selkirk	0.72
1054	Tenured Wood Product Enterprises	Skidegate	Coast	Haida Gwaii	1.44
96	Thomson Bros. Lumber Co. Ltd.	Courtenay	Coast	Campbell River	2.88
979	Woodco Management Ltd	Barriere	South	Thompson Rivers	28.80
1025	Woodpecker sawmill	Golden	South	Selkirk	0.96

Pulp and Paper Mills

(Listed Alphabetically by Product)

Mills producing pulp and paper are listed in this section. For integrated mills, pulp capacity includes pulp that is used internally to produce paper, and pulp that is shipped from the mill site as market pulp.

The annual capacity reported in these tables is estimated based on the same standard operating assumption for each mill (number and length of shifts and days per year as described below). Actual mill production can be higher or lower than estimated capacity if a mill runs on a different operating schedule than assumed here. Therefore, while capacity provides guidance on mill output, it is not a measure of the actual production level of the mill. For more information, please contact Mill.Survey@gov.bc.ca.

Notes:

1. Estimated annual capacity is established on a standardized operation of 345 operating days per year, 24 hours per day. Actual operations may vary from this schedule.

2. Administrative areas and natural resource districts were applied (see Figure 24 for details).

3. The List of Pulp and Paper Mills is available as an Excel spreadsheet online at: https://www2.gov.bc.ca/gov/content/industry/forestry/competitive-forest-industry/forest-industry-economics/fibre-mill-information/major-timber-processing-facilities-survey

PULP AND PAPER MILLS - 2018

Mill Number	Company	Location of Mill	Product	Administrative Area	Natural Resource District	Estimated Annual Capacity (thousand tonnes)
960	Canadian Forest Products Ltd.	Prince George	PLP	North	Prince George	333
500	Canadian Forest Products Ltd.	Prince George	PLP	North	Prince George	316
335	Canadian Forest Products Ltd.	Taylor	PLP	North	Peace	231
503	Canadian Forest Products Ltd.	Prince George	PLP	North	Prince George	563
497	Cariboo Pulp & Paper Co. Ltd.	Quesnel	PLP	South	Quesnel	328
487	Catalyst Paper	Port Alberni	PLP	Coast	South Island	174
486	Catalyst Paper	Powell River	PLP	Coast	Sunshine Coast	252
483	Catalyst Paper	Crofton	PLP	Coast	South Island	660
2	Domtar	Kamloops	PLP	South	Thompson Rivers	381
484	Howe Sound Pulp & Paper Corporation	Port Mellon	PLP	Coast	Sunshine Coast	372
501	Mercer Celgar Limited Partnership	Castlegar	PLP	South	Selkirk	485
488	Nanaimo Forest Products	Cedar	PLP	Coast	South Island	366
505	Paper Excellence BV.	Mackenzie	PLP	North	Mackenzie	186
553	Quesnel River Pulp Company	Quesnel	PLP	South	Quesnel	344
1	Skookumchuk Pulp Inc	Skookumchuk	PLP	South	Rocky Mountain	266
500	Canadian Forest Products Ltd.	Prince George	PPR	North	Prince George	167
483	Catalyst Paper	Crofton	PPR	Coast	South Island	313
487	Catalyst Paper	Port Alberni	PPR	Coast	South Island	305
486	Catalyst Paper	Powell River	PPR	Coast	Sunshine Coast	300
491	Kruger Products LP	New Westminster	PPR	Coast	Chilliwack	56

Veneer, Plywood, OSB and Other Panel Mills

(Listed Alphabetically by Product)

Mills producing veneer, plywood and other types of panel are listed in this section. For mills that produce both market veneer and plywood, veneer capacity includes market veneer and the veneer that is used within the mill to manufacture plywood. Panel mills that use wood residuals to produce panels or that do not have log-processing capability are also listed in this report.

The annual capacity reported in these tables is estimated based on the same standard operating assumption for each mill (number and length of shifts and days per year as described below). Actual mill production can be higher or lower than estimated capacity if a mill runs on a different operating schedule than assumed here. Therefore, while capacity provides guidance on mill output, it is not a measure of the actual production level of the mill. For more information, please contact Mill.Survey@gov.bc.ca.

Notes:

1. Estimated annual capacity of veneer mills is based on a standardized operation of 240 days per year, two 8-hour shifts per day. For plywood mills, estimated annual capacity is based on a standardized operation of 240 days per year, three 8-hour shifts per day. For OSB and other panel mills, estimated annual capacity is based on a standardized operation of 345 days per year, three 8-hour shifts per day. Actual operations may vary from these schedules.

2. Administrative areas and natural resource districts were applied (see Figure 24 for details).

3. The List of Veneer, Plywood, OSB and Other Panel Mills is available as an Excel spreadsheet online at: https://www2.gov.bc.ca/gov/content/industry/forestry/competitive-forest-industry/forest-industry-economics/fibre-mill-information/major-timber-processing-facilities-survey

VENEER, PLYWOOD, OSB AND OTHER PANEL MILLS - 2018

Mill Number	Company	Location of Mill	Product	Administrative Area	Natural Resource District	Estimated Annual Capacity (million sq. ft, 3/8" basis)
411	Norbord Inc.	100 Mile House	OSB	South	100 Mile House	440
942	Peace Valley OSB	Fort St John	OSB	North	Peace	727
650	Louisiana Pacific Canada Ltd.	Dawson Creek	OSB	North	Peace	280
84	Louisiana Pacific Canada Ltd.	Golden	PLY	South	Selkirk	129
112	West Fraser Mills Ltd.	Quesnel	PLY	South	Quesnel	235
109	Aspen Planers Ltd.	Savona	PLY	South	Thompson Rivers	121
1042	Thompson River Veneer Products Ltd.	Kamloops	PLY	South	Thompson Rivers	115
105	West Fraser Mills Ltd.	Williams Lake	PLY	South	Cariboo Chilcotin	212
394	Tolko Industries Ltd.	Heffley Creek	PLY	South	Thompson Rivers	190
68	Tolko Industries Ltd.	Armstrong	PLY	South	Okanagan Shuswap	262
12	Canoe Forest Products Ltd.	Canoe	PLY	South	Okanagan Shuswap	146
478	Richmond Plywood Corp. Ltd.	Richmond	PLY	Coast	Chilliwack	165
113	West Fraser Mills Ltd.	Quesnel	PNL	South	Quesnel	181
105	West Fraser Mills Ltd.	Williams Lake	VNR	South	Cariboo Chilcotin	158
244	Coastland Wood Industries Ltd.	Nanaimo	VNR	Coast	South Island	213
68	Tolko Industries Ltd.	Armstrong	VNR	South	Okanagan Shuswap	192
51	Atco Wood Products	Fruitvale	VNR	South	Selkirk	130
84	Louisiana Pacific Canada Ltd.	Golden	VNR	South	Selkirk	140
394	Tolko Industries Ltd.	Heffley Creek	VNR	South	Thompson Rivers	173
112	West Fraser Mills Ltd.	Quesnel	VNR	South	Quesnel	156
35	Tolko Industries Ltd.	Lumby	VNR	South	Okanagan Shuswap	192
34	B C Veneer Products Ltd	Surrey	VNR	Coast	Chilliwack	2
478	Richmond Plywood Corp. Ltd.	Richmond	VNR	Coast	Chilliwack	108
115	Aspen Planers Ltd.	Lillooet	VNR	South	Cascades	134
1044	Hardwood Lumber	Maple Ridge	VNR	Coast	Chilliwack	0.3
508	CIPA Lumber Co. Ltd.	Annacis Island	VNR	Coast	Chilliwack	216
12	Canoe Forest Products Ltd.	Canoe	VNR	South	Okanagan Shuswap	157

Note: Small mills using less than 25,000 cubic metres of logs per year were also included in the above list.

Chip Mills

(Listed Alphabetically by Company)

Only mills that produce wood chips as a primary product are listed in this section.

The annual capacity reported in these tables is estimated based on the same standard operating assumption for each mill (number and length of shifts and days per year as described below). Actual mill production can be higher or lower than estimated capacity if a mill runs on a different operating schedule than assumed here. Therefore, while capacity provides guidance on mill output, it is not a measure of the actual production level of the mill. For more information, please contact Mill.Survey@gov.bc.ca.

Notes:

1. Estimated annual capacity is based on a standardized operation of 240 days per year, two 8-hour shifts per day. Actual operations may vary from this schedule.

2. Administrative areas and natural resource districts were applied (see Figure 24 for details).

3. The List of Chip Mills is available as an Excel spreadsheet online at: https://www2.gov.bc.ca/gov/content/industry/forestry/competitive-forest-industry/forest-industry-economics/fibre-mill-information/major-timber-processing-facilities-survey

CHIP MILLS - 2018

Mill Number	Company	Location of Mill	Administrative Area	Natural Resource District	Estimated Annual Capacity (Thousand BDUs)
1002	BC Ecochips Ltd	Okanagan Falls	South	Okanagan Shuswap	144
252	C & C Wood Products Ltd.	Quesnel	South	Quesnel	4
446	Campbell River Fibre Ltd.	Campbell River	Coast	Campbell River	90
1	Canadian Forest Products Ltd.	Skookumchuk	South	Rocky Mountain	127
166	Canadian Forest Products Ltd.	Prince George	North	Prince George	552
924	Chips Ahoy Fibre Supply	Mission	Coast	Chilliwack	112
345	DCT Chambers Trucking Ltd.	Chemainus	Coast	South Island	420
356	East Fraser Fibre Co Ltd.	Mackenzie	North	Mackenzie	220
409	Howe Sound Pulp & Paper Ltd.	Vancouver	Coast	Chilliwack	236
1013	Karlite Manufacturing Ltd.	Cowichan Bay	Coast	South Island	182
1000	Ledcor Group	Chilliwack	Coast	Chilliwack	109
1050	North Island Chipping Ltd.	Port McNeill	Coast	North Island - Central Coas	54
1021	Pacific Bioenergy	Quesnel	South	Quesnel	132
937	Pacific Fibre	Port Mellon	Coast	Sunshine Coast	120
952	River City Fibre	Kamloops	South	Thompson Rivers	553
18	Terminal Forest Products Ltd.	Langdale	Coast	Sunshine Coast	34
68	Tolko Industries Ltd.	Armstrong	South	Okanagan Shuswap	38
394	Tolko Industries Ltd.	Heffley Creek	South	Thompson Rivers	96
1001	Valiant Log Sort Ltd.	Port Coquitlam	Coast	Chilliwack	96
113	West Fraser Mills Ltd.	Quesnel	South	Quesnel	181

Pellet Mills

(Listed Alphabetically by Company)

Mills producing wood pellets for bio-energy are listed in this section.

The annual capacity reported in these tables is estimated based on the same standard operating assumption for each mill (number and length of shifts and days per year as described below). Actual mill production can be higher or lower than estimated capacity if a mill runs on a different operating schedule than assumed here. Therefore, while capacity provides guidance on mill output, it is not a measure of the actual production level of the mill. For more information, please contact Mill.Survey@gov.bc.ca.

Notes:

1. Estimated annual capacity of pellet mills is based on a standardized operation of 345 days per year, three 8-hour shifts per day. Actual operations may vary from these schedules.

2. Administrative areas and natural resource districts were applied (see Figure 24 for details).

3. The List of Pellet Mills is available as an Excel spreadsheet online at: https://www2.gov.bc.ca/gov/content/industry/forestry/competitive-forest-industry/forest-industry-economics/fibre-mill-information/major-timber-processing-facilities-survey

PELLET MILLS - 2018

Mill Number	Company	Location of Mill	Administrative Area	Natural Resource District	Estimated Annual Capacity (thousand tonnes)
127	Canadian Forest Products	Chetwynd	North	Peace	113
122	Canadian Forest Products	Fort St John	North	Peace	79
1049	Lavington Pellet Limited Partnership	Lavington	South	Okanagan Shuswap	284
930	Pacific BioEnergy	Prince George	North	Prince George	285
947	Pinnacle Renewable Energy	Houston	North	Nadina	204
929	Pinnacle Renewable Energy	Armstrong	South	Okanagan Shuswap	68
980	Pinnacle Renewable Energy	Burns Lake	North	Nadina	383
976	Pinnacle Renewable Energy	Strathnaver	North	Prince George	203
948	Pinnacle Renewable Energy	Williams Lake	South	Cariboo Chilcotin	167
932	Premium Pellet Ltd.	Vanderhoof	North	Vanderhoof	207
933	Princeton Standard Pellet Corporation	Princeton	South	Cascades	95
1074	Smithers Pellet Limited Partnership	Smithers	North	Skeena Stikine	33
995	Vanderhoof Specialty Wood Products	Vanderhoof	North	Vanderhoof	47

Pole and Post Mills

(Listed Alphabetically by Product)

Mills producing poles, utility poles, and posts are listed in this section.

The annual capacity reported in these tables is estimated based on the same standard operating assumption for each mill (number and length of shifts and days per year as described below). Actual mill production can be higher or lower than estimated capacity if a mill runs on a different operating schedule than assumed here. Thus, while capacity provides guidance on mill output, it is not a measure of the actual production level of the mill. For more information, please contact Mill.Survey@gov.bc.ca.

Notes:

1. Estimated annual capacity is based on a standardized operation of 240 days per year, one 8-hour shift per day, although actual mill operations may vary from this schedule.

2. Administrative areas and natural resource districts were applied (see Figure 24 for details).

3. The List of Pole and Post Mills is available as an Excel spreadsheet online at: https://www2.gov.bc.ca/gov/content/industry/forestry/competitive-forest-industry/forest-industry-economics/fibre-mill-information/major-timber-processing-facilities-survey

POLE, UTILITY POLE, AND POST MILLS - 2018

Mill Number	Company	Location of Mill	Product	Administrative Area	Natural Resource District	Estimated Annual Capacity (000 pieces)
498	Aspen Planers Ltd.	Merritt	PLE	South	Cascades	N/A
117	Continental Pole Ltd.	Pemberton	PLE	Coast	Sea to Sky	12
250	Nicola Post and Rail Ltd.	Merritt	PLE	South	Cascades	120
677	Pacific Inland Pole & Piling Ltd.	Nakusp	PLE	South	Selkirk	12
498	Aspen Planers Ltd.	Merritt	PST	South	Cascades	480
390	Box Lake Lumber Prod Ltd	Nakusp	PST	South	Selkirk	480
117	Continental Pole Ltd.	Pemberton	PST	Coast	Sea to Sky	N/A
250	Nicola Post and Rail Ltd.	Merritt	PST	South	Cascades	720
739	Panhandle Forest Products	Lumberton	PST	South	Rocky Mountain	720
232	Princeton Wood Preservers Ltd	Princeton	PST	South	Cascades	444
188	Bell Pole and Lumber ULC	Rossland	UTI	South	Selkirk	3
659	Brisco Wood Preservers Ltd.	Brisco	UTI	South	Rocky Mountain	24
556	Chinook Forest Products Ltd.	Courtenay	UTI	Coast	Campbell River	N/A
117	Continental Pole Ltd.	Pemberton	UTI	Coast	Sea to Sky	17
40	Gorman Bros Lumber Ltd.	Lumby	UTI	South	Okanagan Shuswap	N/A
181	Hampton Lumber Mills Canada Ltd.	Burns Lake	UTI	North	Nadina	10
999	Otter Point Timber Ltd.	Ladysmith	UTI	Coast	South Island	10
48	Stella Jones Inc.	Revelstoke	UTI	South	Selkirk	8
637	Stella-Jones Inc.	Prince George	UTI	North	Prince George	48
648	STELLA-JONES INC.	Galloway	UTI	South	Rocky Mountain	49
222	Stella-Jones Inc.	Haney	UTI	Coast	Chilliwack	18

Note: N/A – Lack of information to estimate capacities for some DNR mills

Shake and Shingle Mills

(Listed Alphabetically by Company)

Mills producing shakes and shingles are listed in this section.

The annual capacity reported in these tables is estimated based on the same standard operating assumption for each mill (number and length of shifts and days per year as described below). Actual mill production can be higher or lower than estimated capacity if a mill runs on a different operating schedule than assumed here. Thus, while capacity provides guidance on mill output, it is not a measure of the actual production level of the mill. For more information, please contact Mill.Survey@gov.bc.ca.

Notes:

1. Measurement unit is thousand roofing squares (thousand squares). A roofing square is approximately 100 square feet.

2. Estimated annual capacity is based on a standardized operation of 240 days per year, two 8-hour shifts per day. Actual mill operations may vary from this schedule.

3. Administrative areas and natural resource districts were applied (see Figure 24 for details).

4. The List of Shake and Shingle Mills is available as an Excel spreadsheet online at: https://www2.gov.bc.ca/gov/content/industry/forestry/competitive-forest-industry/forest-industry-economics/fibre-mill-information/major-timber-processing-facilities-survey

SHAKE AND SHINGLE MILLS - 2018

Mill Number	Company	Location of Mill	Administrative Areas	Natural Resource District	Estimated Annual Capacity- (000 squares)
1026	A.K. Cedar Products Ltd.	Abbotsford	Coast	Chilliwack	N/A
673	Anbrook Industries Ltd.	Pitt Meadows	Coast	Chilliwack	58
688	Best Quality Cedar Products Ltd	Maple Ridge	Coast	Chilliwack	192
706	Bill Little Contracting Ltd	Campbell River	Coast	Campbell River	3
449	Campbell River Shake and Shingle Co Ltd	Campbell River	Coast	Campbell River	23
1028	Cape Scott Cedar Products Ltd. Mill	Holberg	Coast	North Island - Central Coas	22
1029	Cedar Valley Specialty Cuts	Vancouver	Coast	Chilliwack	5
315	Comox Valley Shakes Ltd.	Campbell River	Coast	Campbell River	50
638	Confederate Shake & Shingle Ltd.	Youbou	Coast	South Island	19
69	Copper Mountain Cedar Products	Terrace	North	Coast Mountain	4
1062	G & R Cedar (2009) Ltd.	Chilliwack	Coast	Chilliwack	34
587	G & R Cedar Ltd.	Matsqui	Coast	Chilliwack	58
399	Goat Lake Forest Products	Powell River	Coast	Sunshine Coast	38
1061	Gold Band Shake and Shingle Ltd.	Mission	Coast	Chilliwack	43
1030	Golden Ears Shingle Ltd.	Mission	Coast	Chilliwack	5
72	Imperial Shake Co Ltd	Abbotsford	Coast	Chilliwack	144
1071	Island Cedar Products	Matsqui	Coast	Chilliwack	N/A
321	J & D Shake and Cedar Mill Ltd.	Duncan	Coast	South Island	72
583	Madewell Cedar Inc.	Mission	Coast	Chilliwack	103
1033	Pacific Cedar	Port Alberni	Coast	South Island	14
1034	Pacific Chalet Ltd.	Powell River	Coast	Sunshine Coast	2
1009	Pendragon-Goldwood Industries Ltd	Gold River	Coast	Campbell River	38
460	Port McNeill Shake & Shingles (2007) Ltd.	Port McNeill	Coast	North Island - Central Coas	19
266	Premium Cedar Products Ltd.	Ruskin	Coast	Chilliwack	113
1036	Riverside Shingle Products	Errington	Coast	South Island	N/A
455	S & W Shake & Shingle Ltd.	Ruskin	Coast	Chilliwack	144
1037	S&K Cedar Products Ltd.	Mission	Coast	Chilliwack	77
591	Serpentine Cedar Ltd.	Fort Langley	Coast	Chilliwack	14
612	Silver Creek Premium Products	Mission	Coast	Chilliwack	226
1039	Stave Lake Cedar Mills (1992) Inc.	Maple Ridge	Coast	Chilliwack	78
902	Taylor Contracting Ltd.	Zeballos	Coast	Campbell River	12
585	Teal cedar products	Revelstoke	South	Selkirk	19
1070	Valley Cedar Shake Products Ltd.	Abbotsford	Coast	Chilliwack	N/A
691	W. Boyes Shake and Shingle Ltd.	150 Mile House	South	Cariboo Chilcotin	14
464	Waldun Forest Products Ltd.	Ruskin	Coast	Chilliwack	187

Note: N/A – Lack of information to estimate capacities for some DNR mills