

WOOD

MARKET

STATISTICS

*Including
Pulp and Paper*

FPInnovations 

IN

SASKATCHEWAN

2009 Edition



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Acknowledgement

This publication was made possible by funding from Natural Resources Canada/Canadian Forest Service and the support of The Government of Saskatchewan.

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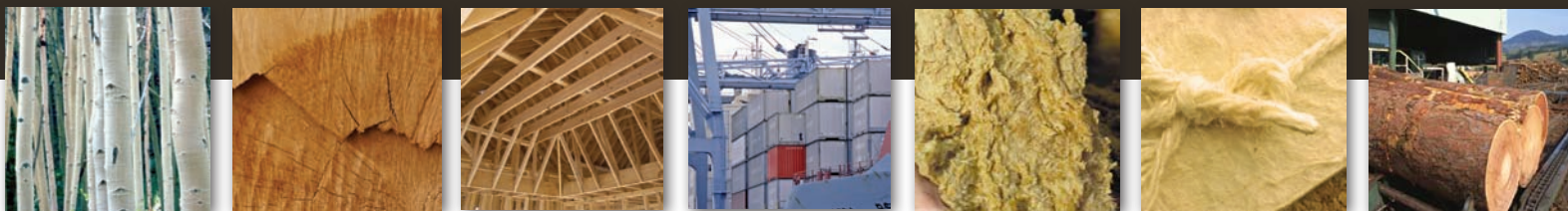
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Global Trade Information Services, Inc.
Government of Saskatchewan - Ministry of Environment, Forest Service
National Forestry Database, Canadian Council of Forest Ministers
Natural Resources Canada
Statistics Canada

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Forestry Innovation Investment
The Edge Forest Business Magazine

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WOOD MARKET STATISTICS – SASKATCHEWAN 2009



Credit: www.naturallywood.com

The British Columbia Forest Industry Fact Book was last issued by the Council of Forest Industries (COFI) in 2000. The COFI Fact Book, as it was commonly known, presented and summarized frequently requested information specific to the forest sector, mainly focusing on British Columbia, as well as some highlights and key findings on Canada and the rest of the world.

Based on the COFI Fact Book, the Markets & Economics Group at FPInnovations has created a new publication - Wood Market Statistics Including Pulp & Paper (WMS). Similar to COFI's Fact Book, WMS will be updated and made available on an annual basis. In addition to Saskatchewan, WMS has been made available for Canada, British Columbia and Alberta.

Based upon the WMS-Saskatchewan edition, noteworthy statistics for the 2008 year include:

- 75% of Saskatchewan's production mills (lumber and panels) are closed, representing approximately 73% of the timber harvested annually;
- 86% of the Saskatchewan's sawmills are closed, representing approximately 94% of the provincial lumber capacity;
- Saskatchewan's first softwood pulp mill in the province closed. With this closure, all sawmills were forced to market their chips out of province. However, the pulp mill in Meadow Lake is now beginning to take softwood chips.
- On a national level, Saskatchewan is considered a small player when it comes to forestry. Saskatchewan's forest product exports have represented less than 1% of Canada's total forest product exports. Before the province's forestry collapse (mill closures, etc.), Saskatchewan represented 2% of the nation's forest product exports.
- In 2008, Saskatchewan's exports of wood products totaled \$58 million – a significant decline from \$443 million in 2005.
- In 2008, Saskatchewan's major exports were panels and pulp.
- Since the 2006 closure of Prince Albert's pulp and paper mill, Saskatchewan has represented only 1% of total pulp and paper exports from Canada.

SASKATCHEWAN'S FOREST RESOURCE AND FOREST INDUSTRY



Photo Credit: Chris Gaston

HIGHLIGHTS

- Saskatchewan's land area is close to 7% of Canada's.
- With one of the highest percentage of intact forests in Canada (74%), over half of Saskatchewan is forested (boreal forest ecosystem).
- The majority of timber harvesting has taken place in the Boreal Plain ecozone – a region that covers almost 30% of the province.
- Long known as a prairie province strong in agriculture, forestry has been a significant industry in Saskatchewan, and after potash, has been the province's largest manufacturer.

SASKATCHEWAN'S FOREST RESOURCE

LAND DISTRIBUTION

Saskatchewan has a total land area of 58.8 million hectares, close to 7% of the nation's total. With over 24 million hectares of forest and other wooded land, about 6% of Canada's, Saskatchewan has one of the lowest forest and other wood land to total land area ratio (41%) of all provinces.

Canada's Land Area, hectares

	Forest Land	Other Wooded Land	Forest and other Wooded Land	Non-Forest Land	Total Land
British Columbia	57,910,000	6,337,000	64,247,000	27,397,000	91,644,000
Alberta	27,718,000	8,670,000	36,388,000	25,011,000	61,399,000
Saskatchewan	20,043,000	4,215,000	24,258,000	34,558,000	58,816,000
Manitoba	18,968,000	17,386,000	36,354,000	17,641,000	53,995,000
Ontario	53,758,000	14,536,000	68,294,000	19,816,000	88,110,000
Quebec	73,360,000	11,215,000	84,575,000	48,395,000	132,970,000
New Brunswick	6,091,000	116,000	6,207,000	922,000	7,129,000
Nova Scotia	4,240,000	107,000	4,347,000	930,000	5,277,000
Prince Edward Island	265,000	8,000	273,000	292,000	565,000
Newfoundland and Labrador	10,730,000	9,337,000	20,067,000	15,311,000	35,378,000
Yukon	7,884,000	14,906,000	22,790,000	23,808,000	46,598,000
Northwest Territories	28,352,000	4,994,000	33,346,000	78,508,000	111,854,000
Nunavut	815,000	125,000	940,000	187,427,000	188,367,000
Canada	310,134,000	91,952,000	402,086,000	480,016,000	882,102,000

Source: Canada's Forests Web site, Natural Resources Canada. Reproduced with the permission of the Minister of Public Works and Government Services, 2009, and the courtesy of the Canadian Forest Service.

<http://canadaforests.nrcan.gc.ca/statsprofile>

Close to 94% of the forest land in Saskatchewan is publicly owned, while the remaining area (1,455,480 hectares) is operated by private owners.

Saskatchewan's Forest Ownership

Saskatchewan's Forest and other Wooded Land 24,258,000 hectares	Ownership	%	hectares
	Provincial	90%	21,832,200
	Federal	4%	970,320
	Private	6%	1,455,480

Source: Canada's Forests Web site, Natural Resources Canada. Reproduced with the permission of the Minister of Public Works and Government Services, 2009, and the courtesy of the Canadian Forest Service.

<http://canadaforests.nrcan.gc.ca/statsprofile>

FOREST CERTIFICATION

Forest certification assures customers that the products they purchase originate from well sustained and managed forests. In Canada, there are three voluntary certification systems available to forest companies: Canadian Standards Association (CSA), Sustainable Forestry Initiative (SFI) and Forest Stewardship Council (FSC).

Saskatchewan is home to 3.9 million hectares (9.5 million acres) of certified lands.** The following illustration shows the current status by certification standard in Saskatchewan:

Forest Certification Status in Saskatchewan

	Area Certified	
	hectares	acres
CSA	3,838,000	9,483,698
FSC	1,800,000	4,447,800
SFI	0	0

Source: Canadian Sustainable Forestry Certification Coalition

**Note: If a forest has been certified to more than one of the three sustainable forest management (CSA, FSC, SFI) standards, the area is only counted once. Therefore, the total of certifications for sustainable forest management (SFM) standards may be less than the sum of individual totals for CSA, FSC and SFI.



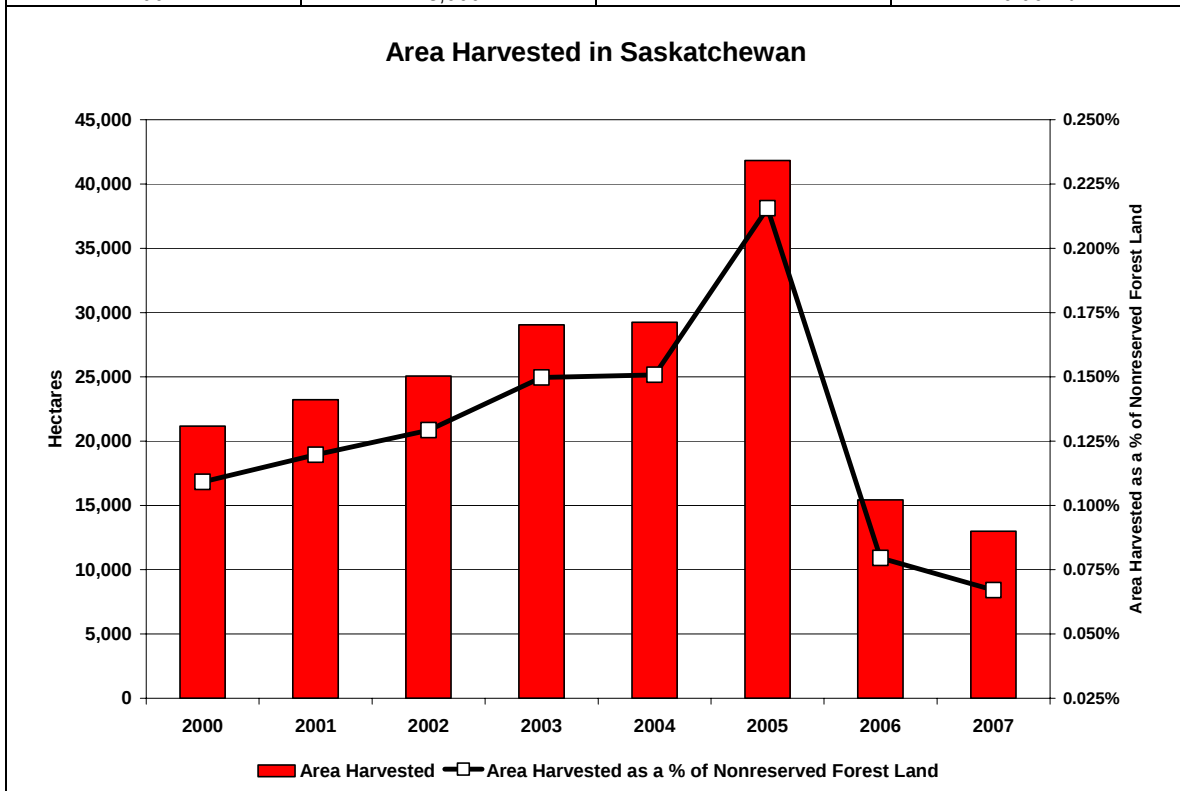
Photo Credit: © 2009 Jupiterimages Corporation

FOREST HARVESTS

Since 2000, harvest levels in Saskatchewan have increased, peaking in 2005. Following 2005, area harvests declined drastically, falling to below 20,000 hectares.

Area Harvested in Saskatchewan, hectares

	Area Harvested	Non-reserved Forest Land	Area Harvested as a % of Non-reserved Forest Land
2000	21,169	19,396,000	0.109%
2001	23,222		0.120%
2002	25,070		0.129%
2003	29,053		0.150%
2004	29,241		0.151%
2005	41,825		0.216%
2006	15,433		0.080%
2007	13,000		0.067%



Source: National Forestry Database, Canadian Council of Forest Ministers (nfdp.ccfm.org)

GROWING STOCK



Photo Credit: © 2009 Jupiterimages Corporation

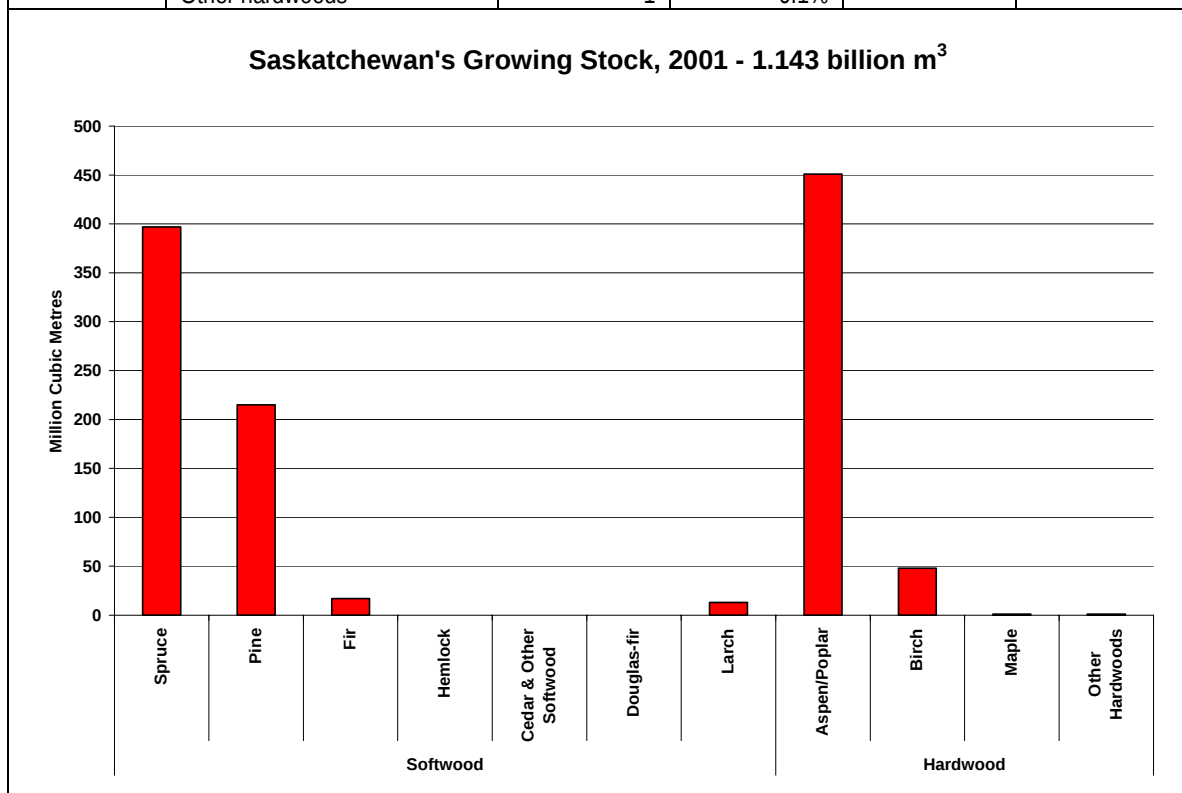
Saskatchewan has a total growing stock of 1.143 billion m³ on its forest land, led by spruce and aspen/poplar. With a net allowable cut close to 7.5 million m³, total actual volume of timber harvested in Saskatchewan has ranged from 38 to 68% over the past eight years.

Growing Stock on Non-reserved Forests by Species

Of the various softwood species, spruce and pine combined account for 612 million m³, or 54.7% of Saskatchewan's growing stock. Aspen/poplar, being the largest hardwood stock, represents 39.5% of the province's growing stock. In fact, aspen/poplar is the province's largest species group.

Saskatchewan's Growing Stock on Non-reserved Forest Land, 2001

		Volume			
		million m ³	%	million m ³	%
Softwood	Spruce	397	34.7%	642	56.2%
	Pine	215	18.8%		
	Fir	17	1.5%		
	Hemlock	0	0.0%		
	Cedar & other softwood	0	0.0%		
	Douglas-fir	0	0.0%		
	Larch	13	1.1%		
Hardwood	Aspen/Poplar	451	39.5%	501	43.8%
	Birch	48	4.2%		
	Maple	1	0.1%		
	Other hardwoods	1	0.1%		



Source: Natural Resources Canada - Canada's Forest Inventory 2001 (<http://NFI.nfis.org>)

TIMBER HARVEST

Saskatchewan's Annual Allowable Cut (AAC) has averaged 7.5 million m³ since 1999/2000. However, total actual volume of timber harvested in the provincial forest has ranged from 38 to 68% of the AAC over the past eight years. The 2006/07 operating year saw a significant drop in harvest levels due to severe market turn downs, and resulting mill production curtailments and closures.

Saskatchewan's AAC, cubic metres

	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07
AAC – SW	4,320,561	4,320,561	4,320,561	4,350,238	4,249,584	4,285,584	4,262,184
AAC – HW	2,862,216	3,370,229	3,370,229	3,431,498	3,316,539	3,316,539	3,366,913
AAC- Total	7,182,777	7,690,790	7,690,790	7,781,736	7,566,123	7,602,123	7,629,097
Actual – SW	2,174,144	2,047,695	2,171,259	2,165,143	2,518,143	2,165,132	1,318,294
Actual – HW	1,695,737	1,657,422	1,995,989	2,089,731	2,456,389	2,593,821	1,612,309
Actual – Total	3,869,881	3,705,117	4,167,248	4,254,874	4,974,532	4,758,953	2,930,603
Balance – SW	2,146,417	2,272,866	2,149,302	2,185,095	1,731,441	2,123,452	2,943,890
Balance – HW	1,166,479	1,712,807	1,374,240	1,341,767	860,150	722,718	1,754,604
Balance - Total	3,312,896	3,985,673	3,523,542	3,526,862	2,591,591	2,843,170	4,698,494

Source: Government of Saskatchewan - Ministry of Environment, Forest Service

Although Saskatchewan does not report log harvests by species or region, data is available based upon volumes required by each forest sector.

Required Timber Volumes, cubic metres

	Required Volume		Total
	Softwood	Hardwood	
Pulp Mills	1,000,000	1,780,000	2,780,000
OSB Mills	0	1,900,000	1,900,000
Plywood Mills	220,000	0	220,000
Sawmills	2,560,000	0	2,560,000
Total	3,780,000	3,680,000	7,460,000

Source: Government of Saskatchewan - Ministry of Environment, Forest Service

While the table above shows that required volumes for its industry, the current reality of the industry is that many mills are closed. In 2008, the province's first softwood pulp mill closed. With this closure, all sawmills were forced to market their chips out of province. However, the pulp mill in Meadow Lake began taking softwood chips in 2008.

SASKATCHEWAN'S FOREST INDUSTRY



Photo Credit: © 2009 Jupiterimages Corporation

Saskatchewan's forest industry has the capacity to produce pulp, OSB, plywood and softwood lumber. Up until a few years ago, there were 12 major mills operational in the province: two pulp mills, two OSB mills, one plywood mill, and seven lumber sawmills. However, since 2006, mill closures have impacted the province's forest industry. Currently, only one pulp mill, one OSB mill, and one sawmill are operating.

Saskatchewan's Forest Industry

Forest Products Mill	Annual Production Capacity	Required Volume (m³)			Approximate Chip Production (m³)	Status
		Softwood	Hardwood	Total		
Pulp Mills	Air Dried Metric Tons					
Prince Albert	355,000	1,800,000		1,800,000	-	Closed Indefinitely (06) Operating
Meadow Lake	375,000	400,00	600,000	1,000,000	-	
Total	730,000	2,200,000	600,000	2,800,000	-	
OSB Mills	Square Feet (3/8 Basis)					
Meadow Lake	725,000,000	0	1,015,000	1,015,000	-	Operating Closed Indefinitely (08)
Hudson Bay	643,000,000	0	900,000	900,000	-	
Total	1,368,000,000	0	1,915,000	1,915,000	-	
Plywood Mills	Square Feet (3/8 Basis)					
Hudson Bay	135,000,000	220,000	0	220,000	55,000	Closed Indefinitely (06)
Total	135,000,000	220,000	0	220,000	55,000	
Sawmills	Board Feet					
Big River	240,000,000	1,000,000	0	1,000,000	400,000	Closed Indefinitely (06)
Meadow Lake	140,000,000	600,000	0	600,000	240,000	Closed Indefinitely (09)
Carrot River	100,000,000	425,000	0	425,000	170,000	Closed Indefinitely (06)
Prince Albert	100,000,000	420,000	0	425,000	212,500	Closed Indefinitely (06)
Prince Albert	70,000,000	300,000	0	300,000	150,000	Closed Indefinitely (08)
Glaslyn	64,000,000	300,000	0	300,000	150,000	Operating
La Ronge	20,000,000	80,000	0	80,000	40,000	Closed Indefinitely (07)
Total	734,000,000	3,130,000	0	3,130,000	1,362,000	
Grand Total	-	5,555,000	2,515,000	8,065,000	1,417,500	

Source: Government of Saskatchewan - Ministry of Environment, Forest Service

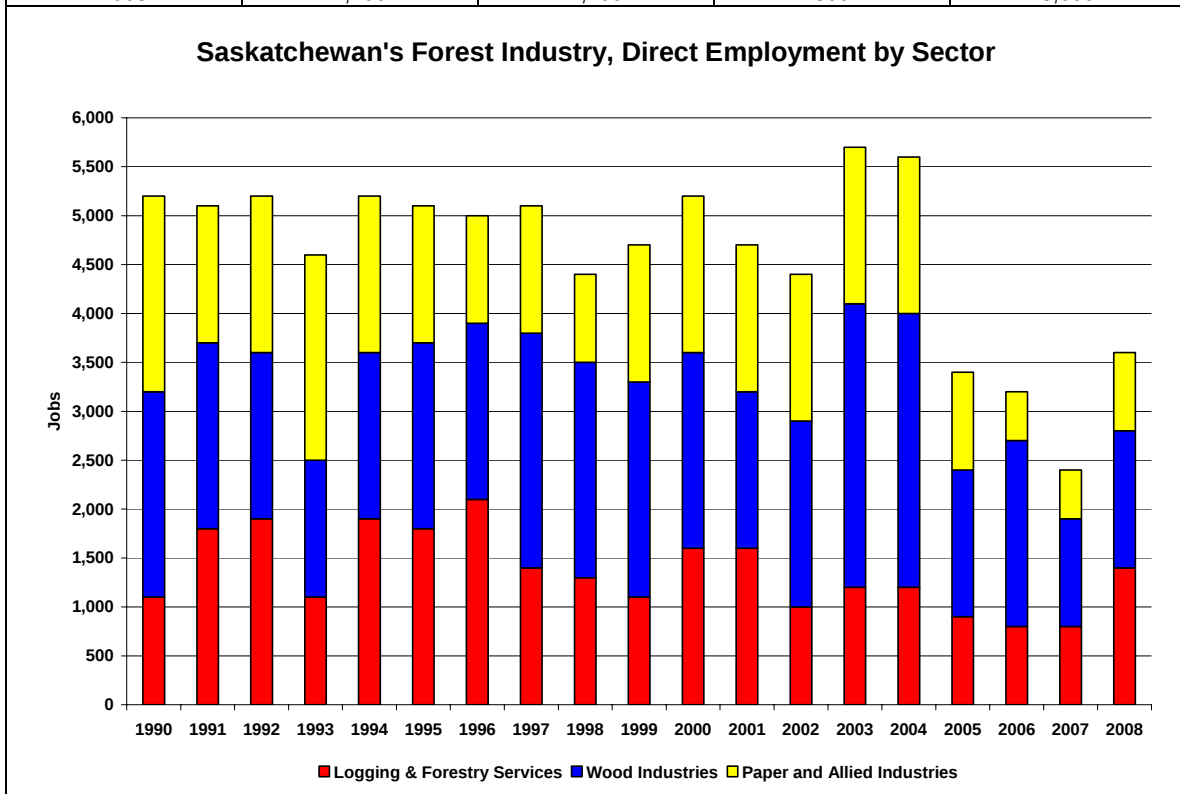
FOREST INDUSTRY AND EMPLOYMENT

In 2008, the forest industry in Saskatchewan provided 3,600 direct jobs. A further breakdown shows that half the jobs were with logging and forestry services and the wood industry sectors.

Although in smaller proportion, Saskatchewan's industry is undergoing the same change as British Columbia. Slow housing starts in the US, along with the strong Canadian dollar have contributed negatively to the industry. In 2005, the number of jobs reported within Saskatchewan's forest industry declined over 30% due to mill closures.

Direct Jobs in Saskatchewan's Forest Industry

	Logging & Forestry Services	Wood Industries	Paper and Allied Industries	Total
2003	1,200	2,900	1,600	5,700
2004	1,200	2,800	1,600	5,600
2005	900	1,500	1,000	3,400
2006	800	1,900	500	3,200
2007	800	1,100	500	2,400
2008	1,400	1,400	800	3,600



Source: National Forestry Database, Canadian Council of Forest Ministers (nfdp.ccfm.org)

FOREST INDUSTRY AND GOVERNMENT REVENUE

Aside from providing employment opportunities to many communities across the province, the forest industry also generates substantial revenue for the government. With many mills closing over recent years, revenues have substantially declined since 2004/2005.

Saskatchewan Forest Industry Revenue, Canadian Dollars

	2004/2005		2005/2006		2006/2007	
	Total Volume (m³)	Total Stumpage	Total Volume (m³)	Total Stumpage	Total Volume (m³)	Total Stumpage
Pulp and Paper	654,456	\$1,256,542	1,194,101	\$719,399	814,711	\$945,194
Sawmill	1,766,414	\$8,897,378	1,665,578	\$3,825,363	1,055,583	\$1,495,120
OSB	859,421	\$2,570,213	1,734,415	\$2,012,818	825,310	\$255,522
Plywood	216,215	\$1,176,088	184,211	\$400,388	143,857	\$276,152
Post	62,760	\$118,217	46,946	\$115,658	88,621	\$137,823
Miscellaneous	166,625	\$511,811	108,535	\$243,050	135,109	\$91,383
Total	3,725,891	\$14,530,249	4,933,785	\$7,316,675	3,063,190	\$3,201,193

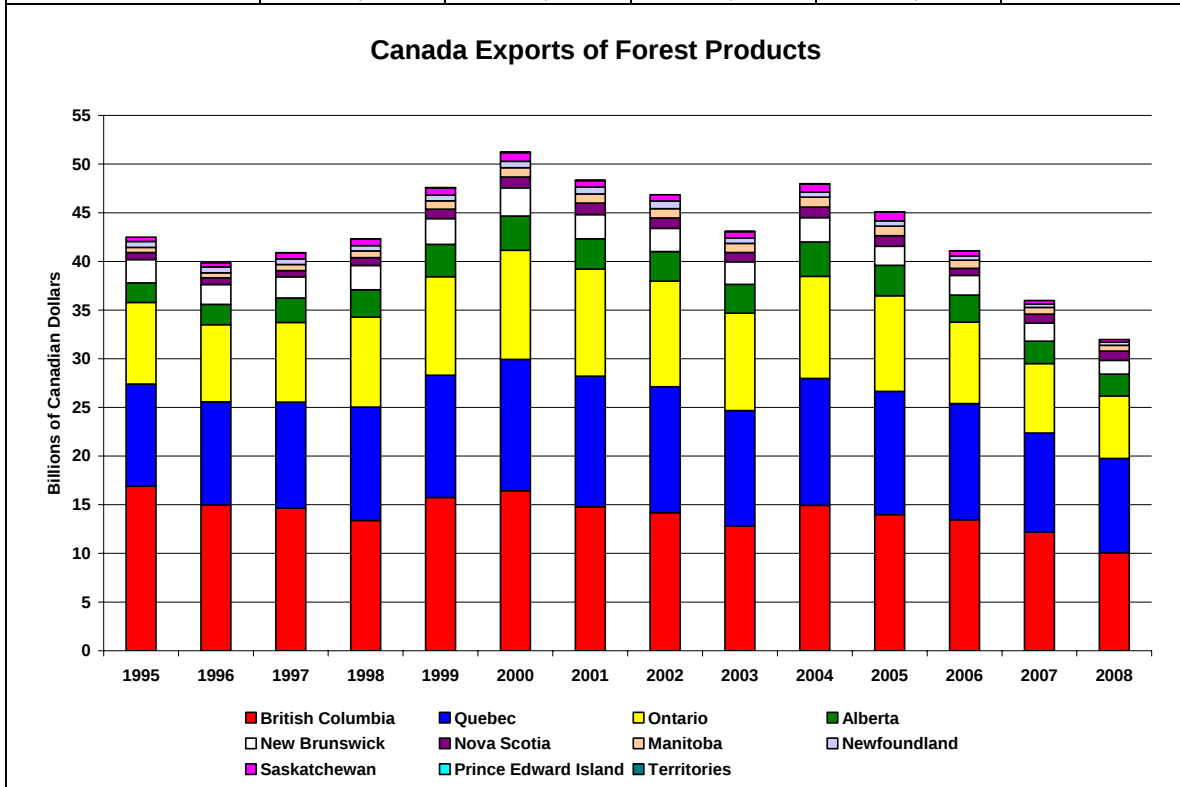
Source: Government of Saskatchewan - Ministry of Environment, Forest Service

FOREST PRODUCTS INDUSTRY

On a national level, Saskatchewan is considered a very small player when it comes to forestry. Saskatchewan's forest product exports have represented less than 1% of Canada's total forest product exports.

Canada Exports of Forest Products by Provinces, millions of Canadian Dollars

	2005	2006	2007	2008	% Change (07-08)
British Columbia	13,973.78	13,458.88	12,188.03	10,031.51	-17.7%
Quebec	12,677.49	11,943.51	10,183.98	9,709.42	-4.7%
Ontario	9,818.71	8,373.35	7,125.76	6,439.97	-9.6%
Alberta	3,134.04	2,756.74	2,315.00	2,229.90	-3.7%
New Brunswick	1,950.84	2,027.05	1,861.59	1,425.72	-23.4%
Nova Scotia	1,087.75	730.75	916.41	962.59	5.0%
Manitoba	986.12	825.64	687.42	567.69	-17.4%
Newfoundland	538.63	455.34	347.55	340.08	-2.1%
Saskatchewan	886.27	490.61	349.49	265.64	-24.0%
Prince Edward Island	26.53	18.08	12.09	8.72	-27.9%
Territories	0.91	1.23	1.34	0.64	-52.2%
Canada	45,081.07	41,081.19	35,988.65	31,981.88	-11.1%

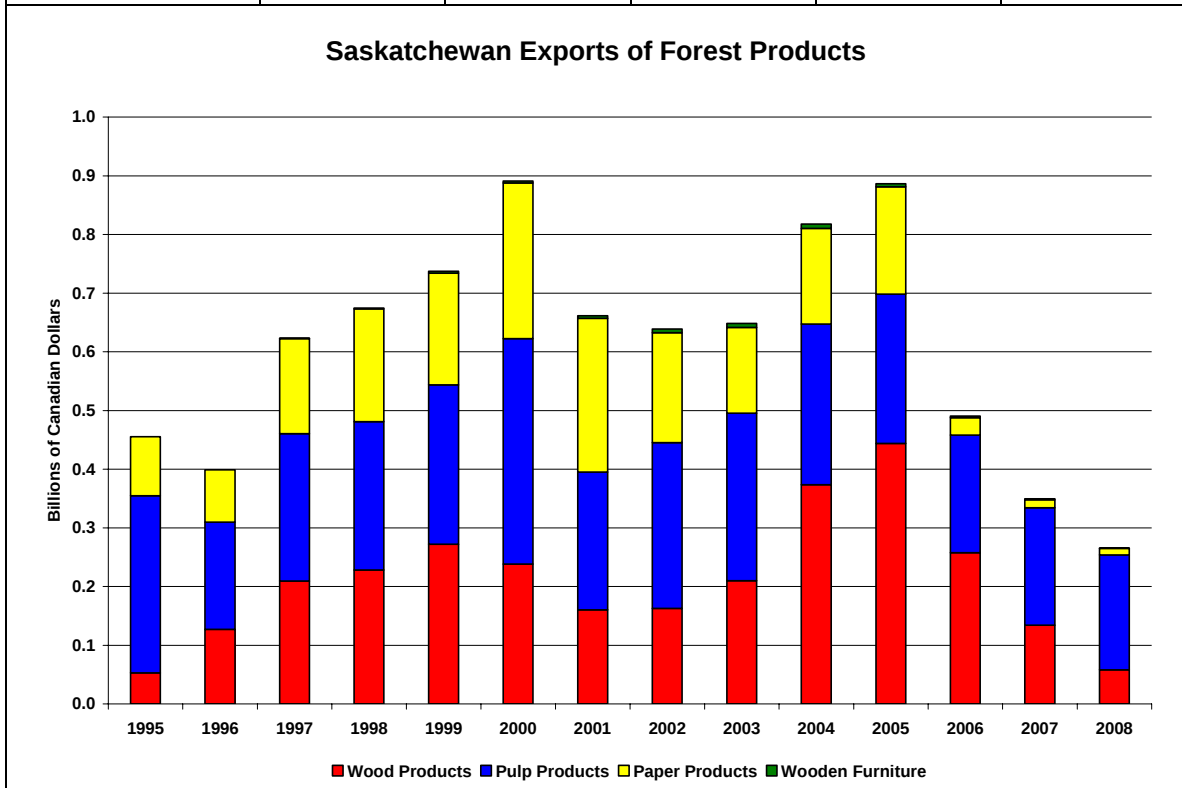


Source: Global Trade Information Services, Inc.

In 2008, export shipments of forest products by Saskatchewan totaled \$265 million, down 24% from 2007, and more than 70% since 2005.

Saskatchewan Exports of Forest Products, millions of Canadian Dollars

	2005	2006	2007	2008	% Change (07-08)
Wood Products	443.85	257.53	133.95	58.05	-56.7%
Pulp Products	254.21	200.46	200.58	195.81	-2.4%
Paper Products	182.95	29.89	13.22	10.93	-17.3%
Wooden Furniture	5.26	2.73	1.74	0.85	-51.1%
Total	886.27	490.61	349.49	265.64	-24.0%



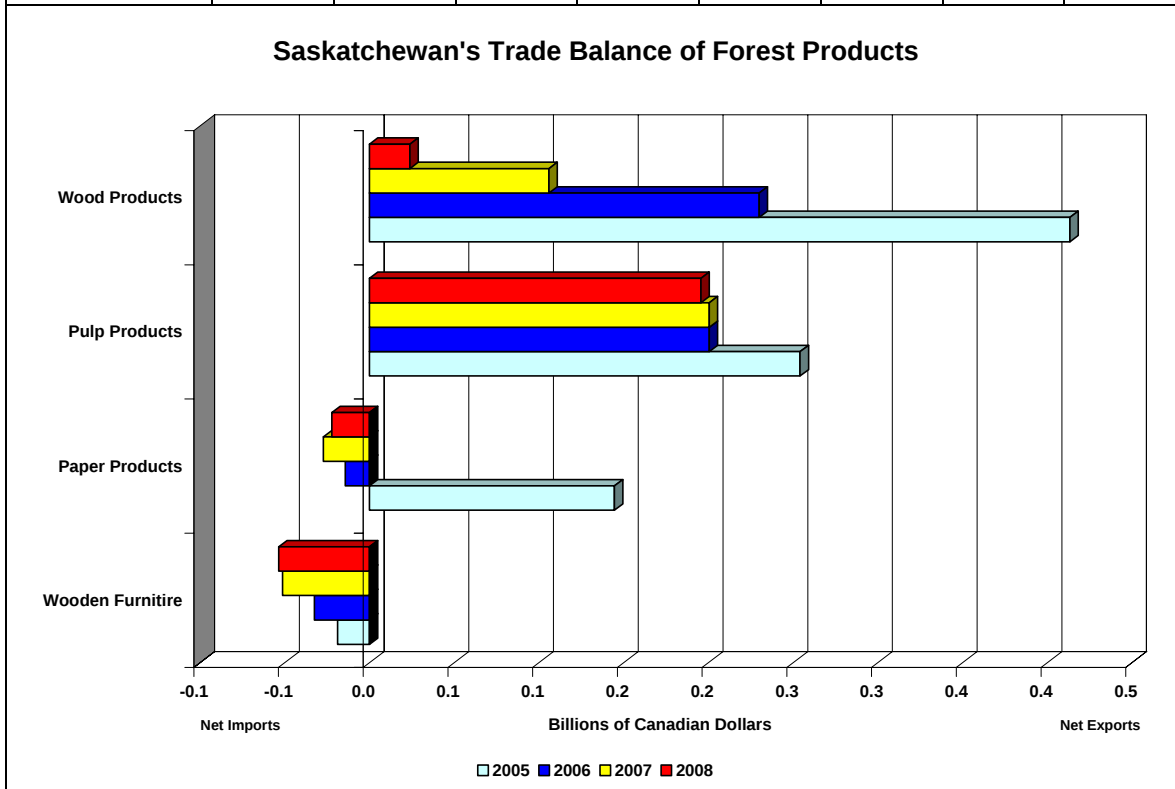
Source: Global Trade Information Services, Inc.

The balance of trade, also referred to as net exports, is defined as the difference between the monetary value of exports and imports in an economy (over a given period of time). A positive balance of trade, known as a trade surplus, signifies that a jurisdiction has exported more than they have imported. On the other hand, a negative balance of trade is known as a trade deficit or a trade gap, and implies that a jurisdiction has imported more than they have exported.

Saskatchewan's forest product sector (as a whole) has experienced a positive trade balance largely due to wood and pulp products (peaking in 2005). Paper products and wooden furniture, however, have earned negative trade balances.

Saskatchewan's Trade Balance of Forest Products, millions of Canadian Dollars

	2001	2002	2003	2004	2005	2006	2007	2008
Wood Products	124.95	125.35	177.38	342.31	413.44	230.03	105.90	23.87
Pulp Products	230.41	278.21	280.53	273.66	254.18	200.46	200.47	195.61
Paper Products	189.21	120.14	83.44	109.58	144.54	-14.32	-27.22	-22.18
Wooden Furniture	-11.02	-10.83	-9.73	-13.51	-18.90	-32.41	-51.33	-53.56
Total	533.55	512.87	531.62	712.05	793.26	383.76	227.82	143.74



Source: Global Trade Information Services, Inc.

SASKATCHEWAN'S WOOD PRODUCTS INDUSTRY



Credit: www.naturallywood.com

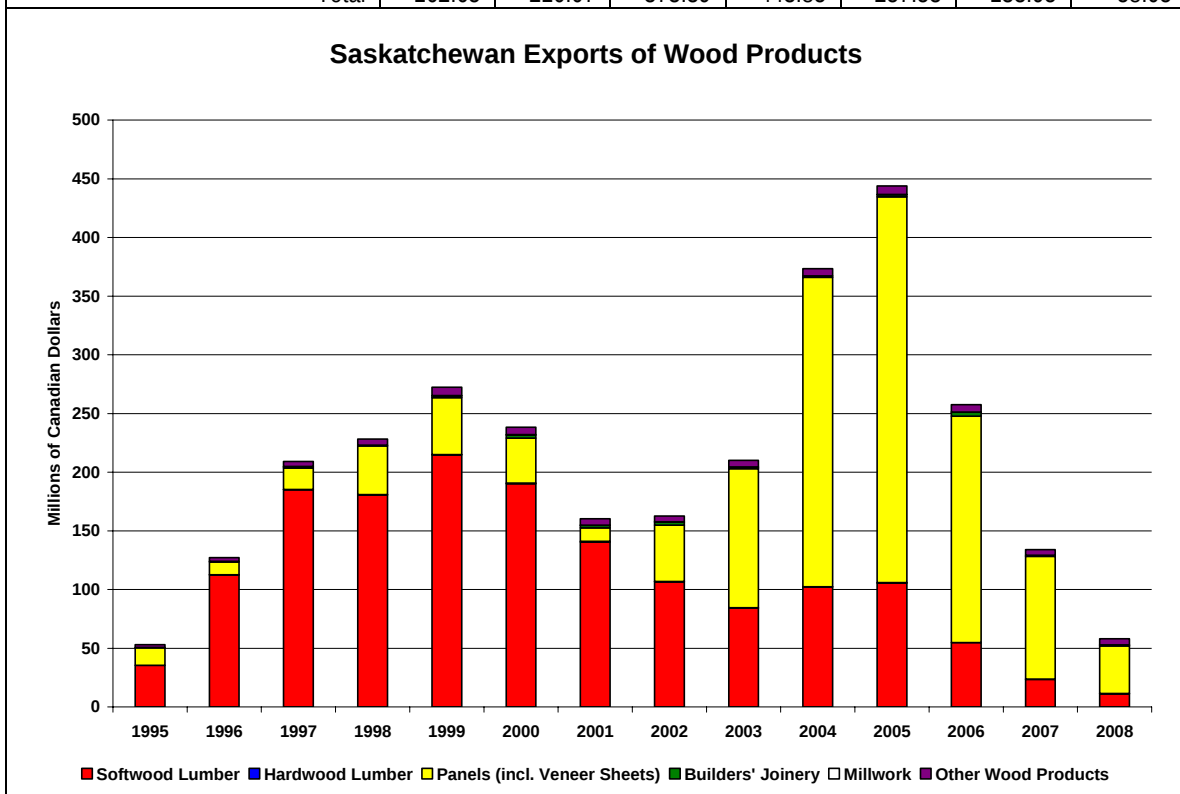
Given the number of mill closures that have impacted Saskatchewan over recent years, the province exports a small amount of wood products. In 2008, Saskatchewan's major export was panels.

Since 2003, panels have remained one of Saskatchewan's top wood export products. While exports from this segment have declined since 2005, panels still represented 70% of the province's exports of wood products.

Due to mill closures, lumber and panel exports decreased substantially in 2008 (51% and 61% respectively). Decline in exports from these two segments has continued as a result of further mill closure announcements.

Saskatchewan Exports of Wood Products, millions of Canadian Dollars

	2002	2003	2004	2005	2006	2007	2008
Softwood	106.54	84.24	102.24	105.53	54.67	23.50	11.20
Hardwood	0.31	0.20	0.21	0.26	0.12	0.15	0.27
Lumber	106.85	84.44	102.45	105.79	54.79	23.64	11.47
Panels (incl. Veneer Sheets)	48.15	118.46	263.52	328.68	192.87	104.73	40.59
Builders' Joinery*	2.42	1.42	1.19	2.01	3.49	0.74	0.58
Millwork	0.25	0.09	0.09	0.07	0.11	0.02	0.18
Other Wood Products	4.97	5.67	6.14	7.30	6.28	4.81	5.24
Total	162.65	210.07	373.39	443.85	257.53	133.95	58.05



*Builders' Joinery consists of doors, windows, prefab partitions and panels, fences, roof trusses, beams, arches, shakes and shingles.

Source: Global Trade Information Services, Inc.

In 2008, Saskatchewan's exports of wood products totaled \$58 million – a significant decline from \$443 million in 2005. The United States has continued to be the top customer of Saskatchewan's wood products, importing 98% of all wood products exported in 2008.

Saskatchewan Exports of Wood Products, millions of Canadian Dollars

	2002	2003	2004	2005	2006	2007	2008
United States	161.61	207.11	367.20	437.97	255.09	133.48	57.00
Other	1.04	2.97	6.19	5.88	2.44	0.47	1.05
Total	162.65	210.07	373.39	443.85	257.53	133.95	58.05



Source: Global Trade Information Services, Inc.

SASKATCHEWAN LUMBER



Photo Credit: © 2009 Jupiterimages Corporation

Over the past few years, the face of Saskatchewan's lumber industry has changed. When the new sawmill at Big River was built in 2000, it was the largest sawmill in the Commonwealth. Unfortunately, this mill, along with many others, is now closed.

Saskatchewan's sawmill capacity is approximately 674,000,000 bf across seven major mills. Only one of these mills (at the time of this publication) is operating. The remaining six closed mills represent approximately 94% of the province's softwood lumber capacity.

LUMBER PRODUCTION & CAPACITY

Canadian Lumber Statistics, cubic metres

		Production	Shipments	Exports	Domestic Consumption (include shipments to other provinces)
2006	Saskatchewan	511,200	505,700	383,900	121,800
	British Columbia	41,050,100	41,023,700	32,829,400	8,194,300
	Rest of Canada	39,308,300	38,903,800	19,421,500	19,482,300
	Canada	80,869,600	80,433,200	52,634,800	27,798,400
2007	Saskatchewan	x	x	169,800	x
	British Columbia	36,677,300	36,822,100	28,243,700	8,578,400
	Rest of Canada	35,365,500	35,339,400	16,536,800	18,632,800
	Canada	72,042,800	72,161,500	44,950,300	27,211,200
2008	Saskatchewan	x	x	110,455	x
	British Columbia	28,191,500	28,512,000	21,216,357	7,295,643
	Rest of Canada	29,058,400	29,178,400	11,633,838	17,434,107
	Canada	57,249,900	57,690,400	32,960,650	24,729,750

NOTE: x = information not available due to confidentiality

Source: Global Trade Information Services, Inc.

Adapted from Statistics Canada publication *Sawmills*, Catalogue 35-003, vols. 60-62, no. 12,

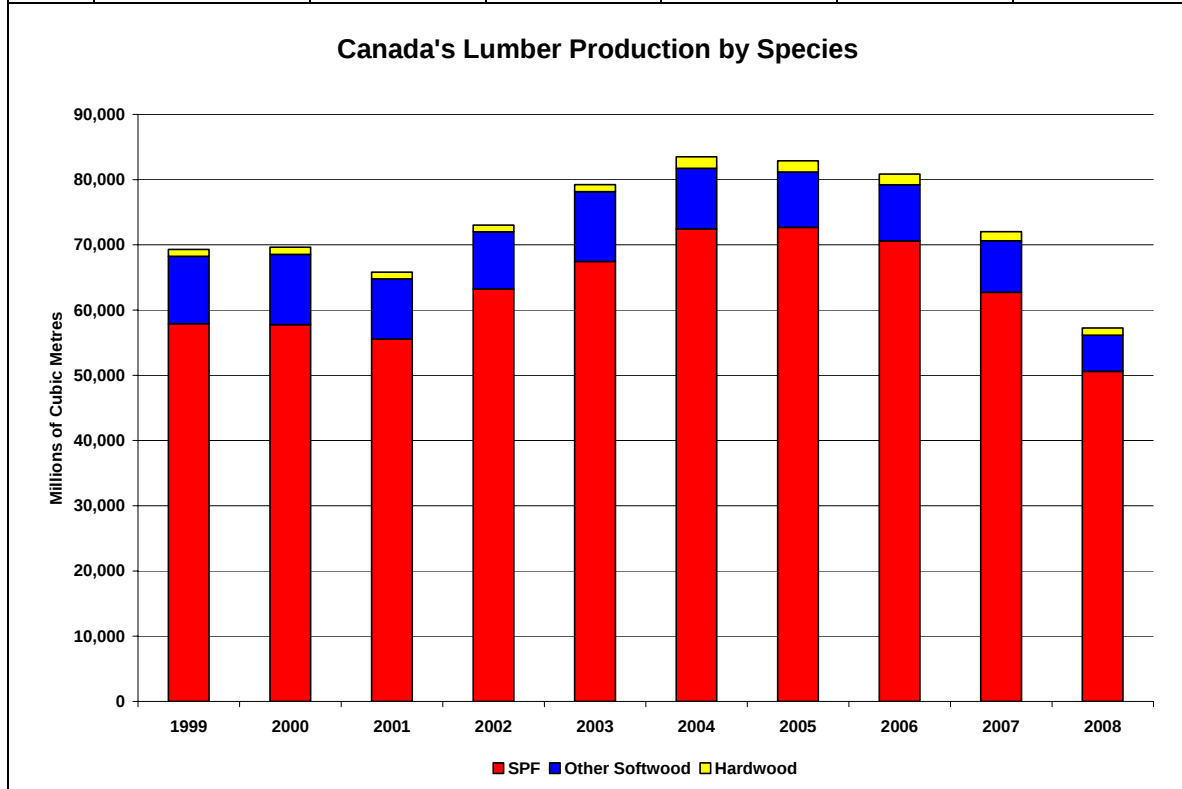
<http://www.statcan.gc.ca/bsolc/olc-cel/olc-cel?lang=eng&catno=35-003-X>

While production, shipments, exports and domestic consumption data is available for 2006, data for 2007 and 2008 are not. With a small number of mills operating in 2008, information is not available due to confidentiality reasons.

Even though production data was not made available since 2007, 2006 numbers showed that lumber produced in Saskatchewan was predominately of the SPF species group.

Canadian Lumber Production, cubic metres

		SPF	Other Softwood	Softwood	Hardwood	Total
2006	Saskatchewan	511,200	0	511,200	0	511,200
	British Columbia	33,976,800	7,073,300	41,050,100	0	41,050,100
	Rest of Canada	36,103,200	1,562,900	37,666,100	1,642,200	39,308,300
	Canada	70,591,200	8,636,200	79,227,400	1,642,200	80,869,600
2007	Saskatchewan	x	x	x	x	x
	British Columbia	30,830,900	5,846,400	36,677,300	0	36,677,300
	Rest of Canada	31,896,200	2,068,000	33,964,200	1,401,200	35,365,400
	Canada	62,727,100	7,914,400	70,641,500	1,401,200	72,042,700
2008	Saskatchewan	x	x	x	x	x
	British Columbia	24,309,200	3,882,300	28,191,500	0	28,191,500
	Rest of Canada	26,288,600	1,659,100	27,947,700	1,110,700	29,058,400
	Canada	50,597,800	5,541,400	56,139,200	1,110,700	57,249,900



NOTE: x = information not available due to confidentiality

Adapted from Statistics Canada publication *Sawmills*, Catalogue 35-003, vols. 53-62, no. 12,

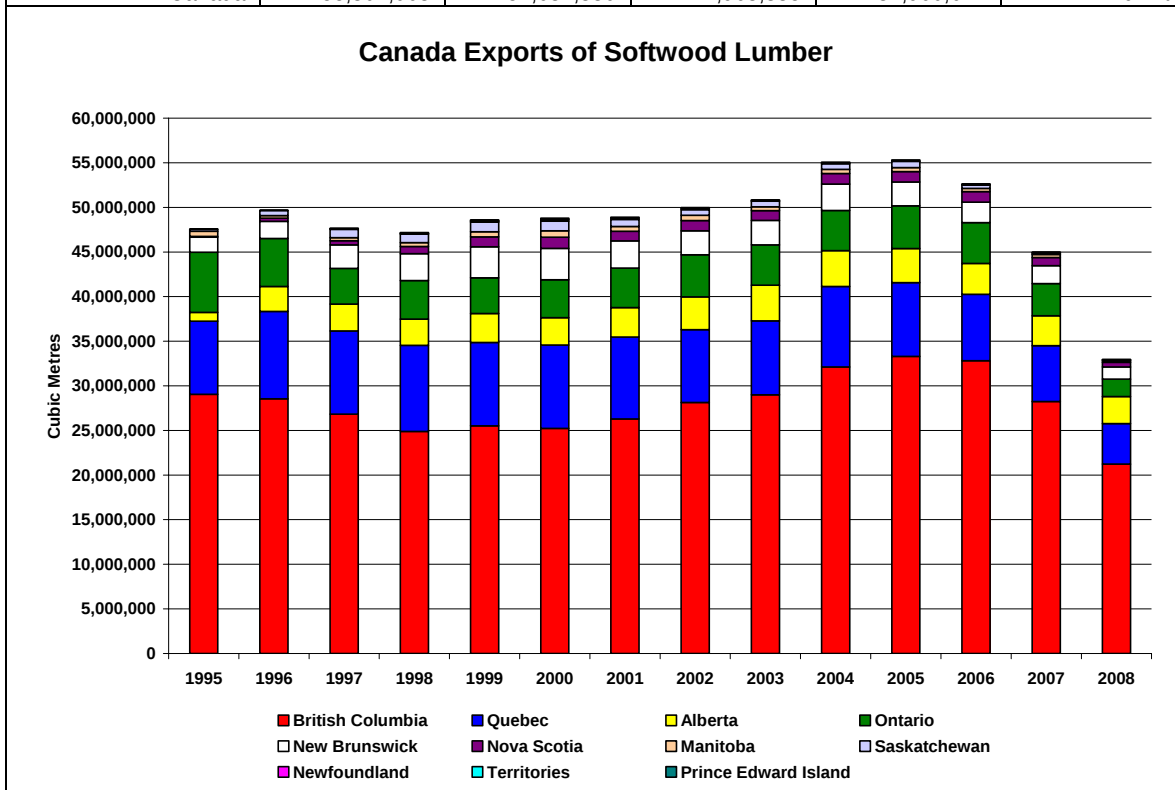
<http://www.statcan.gc.ca/bsolc/olc-cel/olc-cel?lang=eng&catno=35-003-X>

LUMBER EXPORTS

As previously mentioned, on a national level, Saskatchewan is a very small player when it comes to forestry (representing a less than 1% of Canada's softwood lumber exports). Even as a small player, lumber exports have declined sharply over the past few years. With a 35% decline in 2008 (from 2007), export sales from Saskatchewan essentially became negligible at 0.003% in 2008.

Canada Exports of Softwood Lumber by Provinces, cubic metres

	2005	2006	2007	2008	% Change (07-08)
British Columbia	33,300,013	32,829,359	28,251,947	21,216,457	-24.9%
Quebec	8,266,551	7,420,527	6,241,590	4,550,166	-27.1%
Alberta	3,822,074	3,466,041	3,378,332	3,020,805	-10.6%
Ontario	4,791,763	4,568,345	3,588,151	1,953,629	-45.6%
New Brunswick	2,650,956	2,315,510	2,007,011	1,379,864	-31.2%
Nova Scotia	1,191,062	1,163,307	914,283	522,698	-42.8%
Manitoba	438,956	381,367	339,464	181,485	-46.5%
Saskatchewan	689,700	383,946	169,791	110,455	-34.9%
Newfoundland	64,033	42,319	47,826	24,719	-48.3%
Territories	0	10	540	283	-47.6%
Prince Edward Island	91,955	64,105	29,400	113	-99.6%
Canada	55,307,063	52,634,836	44,968,335	32,960,674	-26.7%

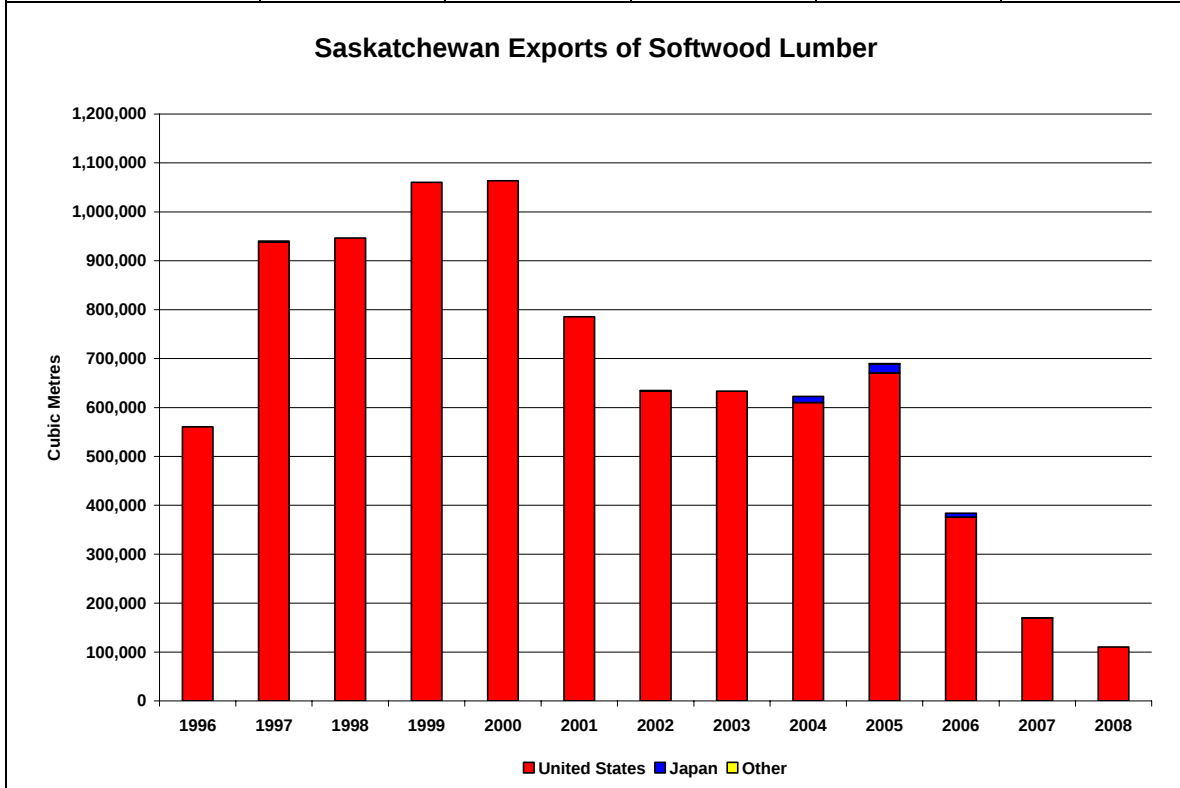


Source: Global Trade Information Services, Inc.

Outside of the US, Japan has been an important importer of Saskatchewan lumber (reporting an increase of 184% in 2008 from 2007 exports from Saskatchewan).

Saskatchewan Exports of Softwood Lumber by Destination, cubic metres

	2005	2006	2007	2008	% Change (07-08)
United States	670,835	376,014	169,255	110,125	-34.9%
Japan	18,640	7,932	116	330	184.5%
Other	225	0	420	0	-100.0%
Total	689,700	383,946	169,791	110,455	-34.9%

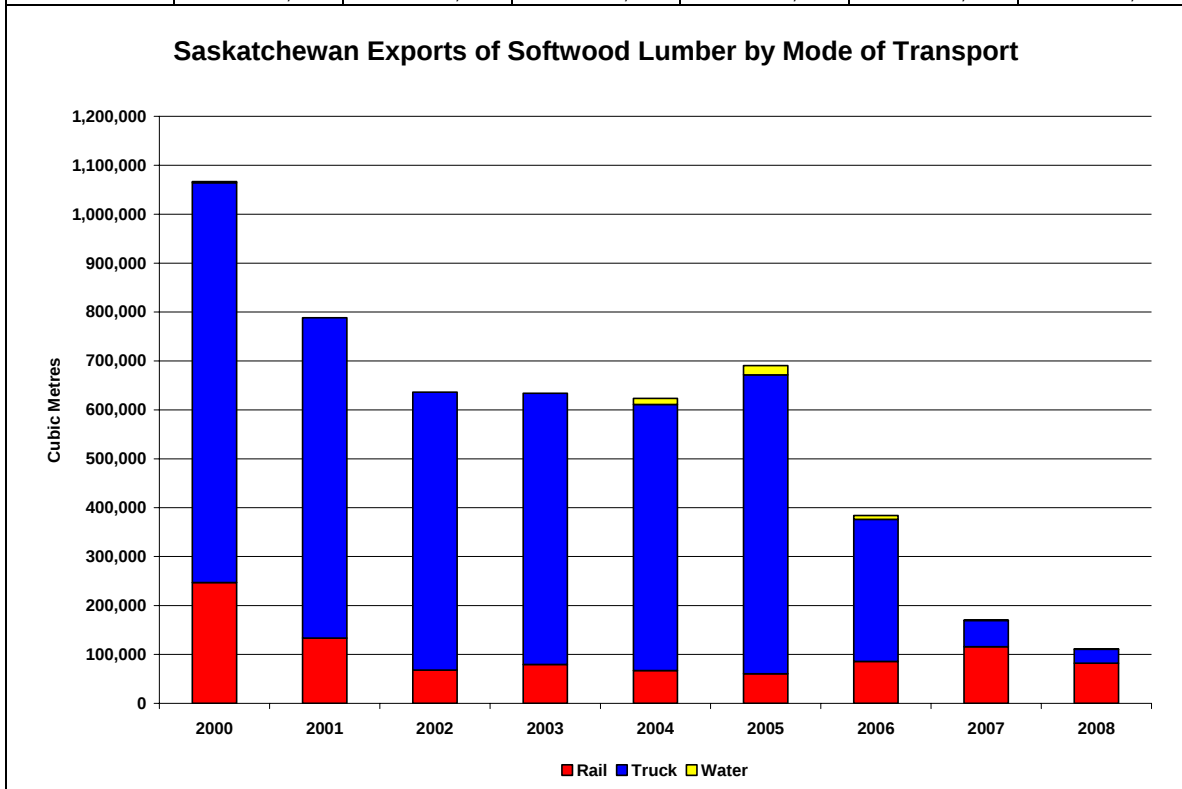


Source: Global Trade Information Services, Inc.

Modes of transporting the softwood lumber from Saskatchewan to its non-Canadian customers include trucks, railways and waterways.

Saskatchewan Export of Softwood Lumber by Mode of Transport, cubic metres

	2003	2004	2005	2006	2007	2008
Rail	79,600	67,100	60,400	85,900	115,500	82,000
Truck	554,100	543,700	611,300	290,000	54,100	28,500
Water	-	12,500	18,900	8,000	400	700
Total	633,700	623,300	690,600	383,900	170,000	111,200



For exports, mode of transport information represents the mode of transport by which the international boundary is crossed. This may be different from the mode of transport within Canada.

Adapted from Statistics Canada publication *Sawmills*, Catalogue 35-003, vols. 57-62, no. 12,
<http://www.statcan.gc.ca/bsolc/olc-cel/olc-cel?lang=eng&catno=35-003-X>

SASKATCHEWAN PANELS

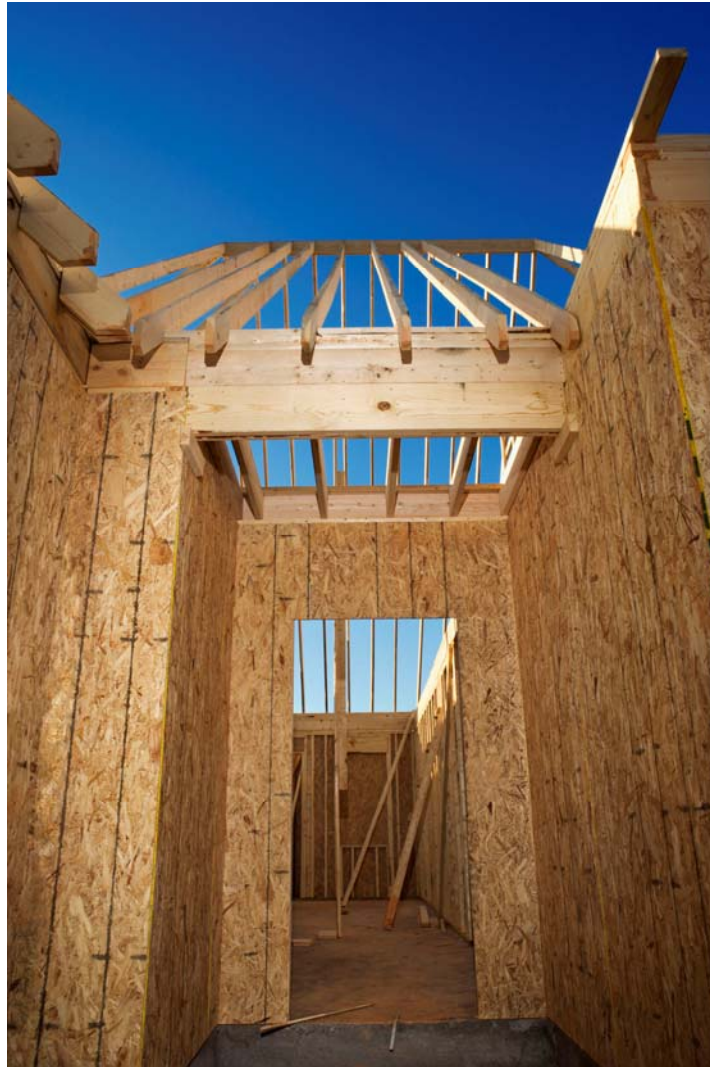


Photo Credit: FPInnovations

Panel production in Saskatchewan has faced some difficult times. Prior to 2006, Saskatchewan was home to three panel facilities: two OSB mills and one plywood mill. The plywood mill, located in Hudson Bay, closed its doors indefinitely in 2006. Two years later (2008), the Hudson Bay OSB mill also closed indefinitely. Currently, only one OSB mill is operational in Meadow Lake.

PLYWOOD PRODUCTION CAPACITY

Saskatchewan's only plywood mill, located in Hudson Bay, closed its doors indefinitely in 2006. This mill, when operating, had a capacity of 135,000,000 square feet (3/8" basis).



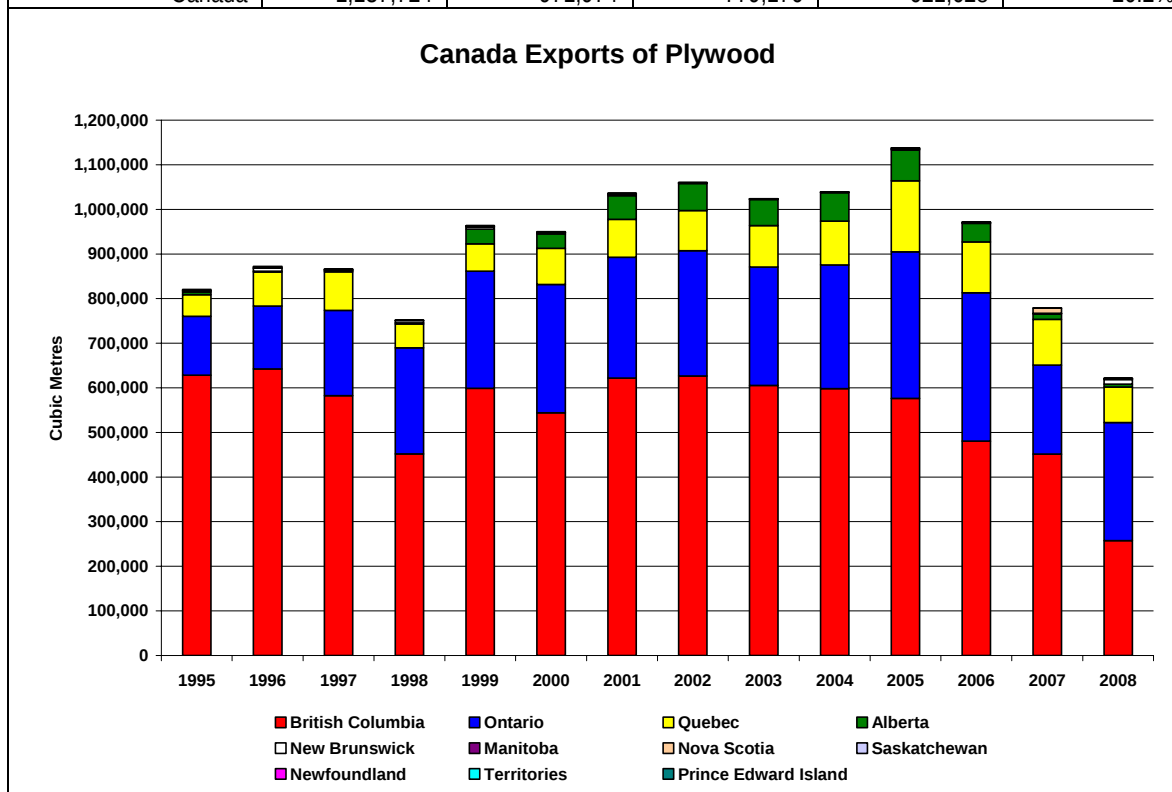
Credit: www.naturallywood.com

PLYWOOD EXPORTS

With only one plywood mill operating in Saskatchewan up until 2006, plywood exports from Saskatchewan (like softwood lumber) have been very small (averaging 0.0005% since 2004). While the mill closed its doors indefinitely in 2006, Statistics Canada has reported plywood exports from Saskatchewan since then. This could possibly be a result of selling inventory still on site.

Canada Exports of Softwood Plywood by Provinces, cubic metres

	2005	2006	2007	2008	% Change (07-08)
British Columbia	576,367	480,589	451,548	257,147	-43.1%
Ontario	328,532	332,527	199,231	265,159	33.1%
Quebec	159,159	114,194	102,647	79,583	-22.5%
Alberta	69,524	41,168	12,627	6,243	-50.6%
New Brunswick	405	867	337	10,529	3024.3%
Manitoba	3,029	1,096	862	846	-1.9%
Nova Scotia	167	643	11,245	935	-91.7%
Saskatchewan	465	755	610	524	-14.1%
Newfoundland	41	43	22	657	2886.4%
Territories	0	0	0	5	-
Prince Edward Island	35	92	47	0	-100.0%
Canada	1,137,724	971,974	779,176	621,628	-20.2%

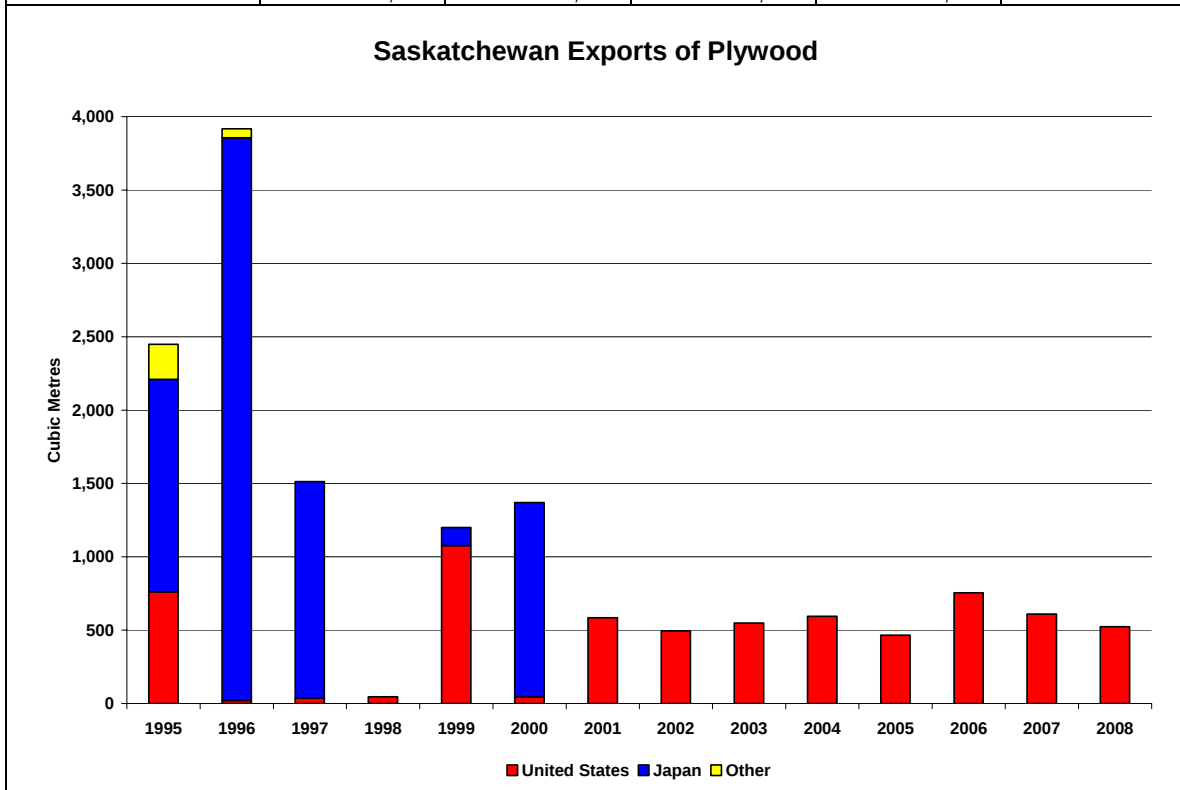


Source: Global Trade Information Services, Inc.

All plywood manufactured in Saskatchewan has been sold solely to the US since 2001 as the Japanese market had been lost. Even though the volume shipped has been falling since 2006, the dollar value has risen.

Saskatchewan Exports of Plywood by Destination, Canadian Dollars

	2005	2006	2007	2008	% Change (07-08)
United States	152,024	107,160	199,461	261,000	30.9%
Japan	0	0	0	0	-
Other	0	0	0	0	-
Total	152,024	107,160	199,461	261,000	30.9%



Source: Global Trade Information Services, Inc.

OSB PRODUCTION CAPACITY

Canada's first waferboard plant was built in 1963 by MacMillan Bloedel in Hudson Bay, Saskatchewan. Unfortunately, the very same mill, with a capacity of 643,000,000 square feet (3/8" basis), closed indefinitely in 2008. Currently, there is only one OSB mill operating (Meadow Lake). This mill has the production capacity of 725,000,000 square feet (3/8" basis).



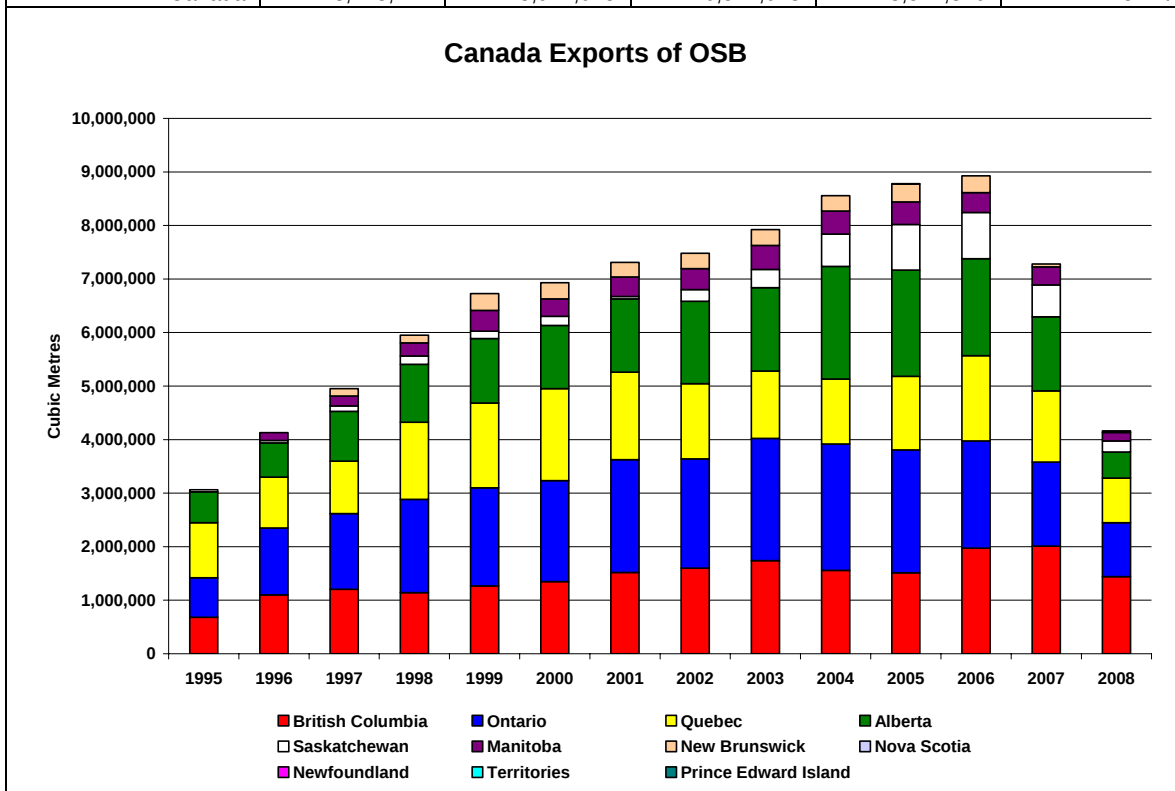
Photo Credit: FPInnovations

OSB EXPORTS

With only two mills, OSB exports from Saskatchewan have represented just over 8% of Canada's export sales since 2004. As previously mentioned, Saskatchewan only has one OSB mill remaining in operation as the Hudson Bay mill closed in 2008.

Canada Exports of OSB by Provinces, cubic metres

	2005	2006	2007	2008	% Change (07-08)
British Columbia	1,511,120	1,973,125	1,854,789	1,431,749	-22.8%
Ontario	2,294,212	2,002,146	1,362,521	861,981	-36.7%
Alberta	1,985,004	1,811,390	1,383,277	488,280	-64.7%
Quebec	1,374,701	1,592,366	985,556	396,526	-59.8%
Saskatchewan	852,472	862,304	591,059	204,304	-65.4%
Manitoba	423,364	372,490	338,970	158,870	-53.1%
Nova Scotia	156	215	60	110	83.3%
Territories	0	135	0	0	-
Newfoundland	0	137	138	0	-100.0%
Prince Edward Island	174	137	0	0	-
New Brunswick	337,238	312,583	5,653	0	-100.0%
Canada	8,778,441	8,927,028	6,522,023	3,541,820	-45.7%

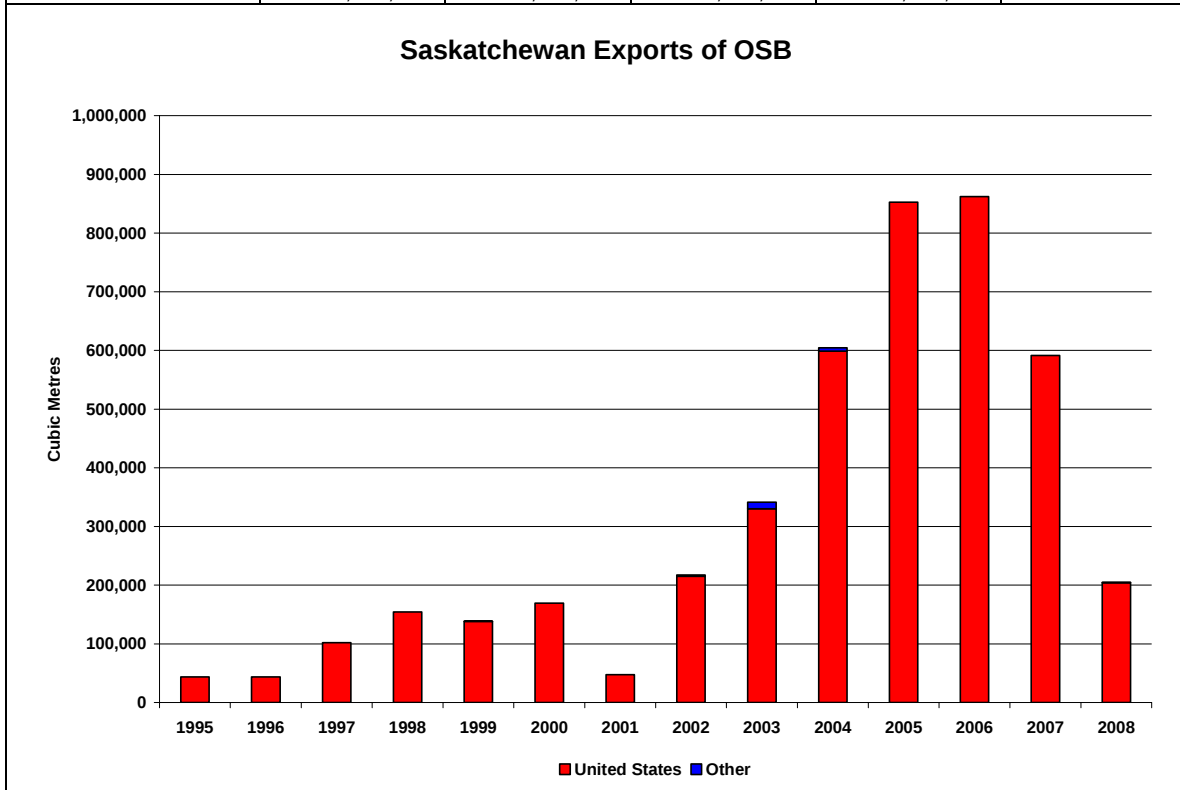


Source: Global Trade Information Services, Inc.

Like softwood lumber and plywood, the US has been the primary importer of OSB manufactured from Saskatchewan. After peaking in 2005 (an increase of 600% since 2002), OSB exports to the US decreased 68% in 2007 (from 2005) and another 62% in 2008.

Saskatchewan Exports of OSB by Destination, Canadian Dollars

	2005	2006	2007	2008	% Change (07-08)
United States	328,105,527	192,215,657	104,067,797	39,633,662	-61.9%
Other	0	0	23,776	185,258	679.2%
Total	328,105,527	192,215,657	104,091,573	39,818,920	-61.7%



Source: Global Trade Information Services, Inc.

SASKATCHEWAN'S PULP & PAPER PRODUCTS INDUSTRY



Photo Credit: FPInnovations

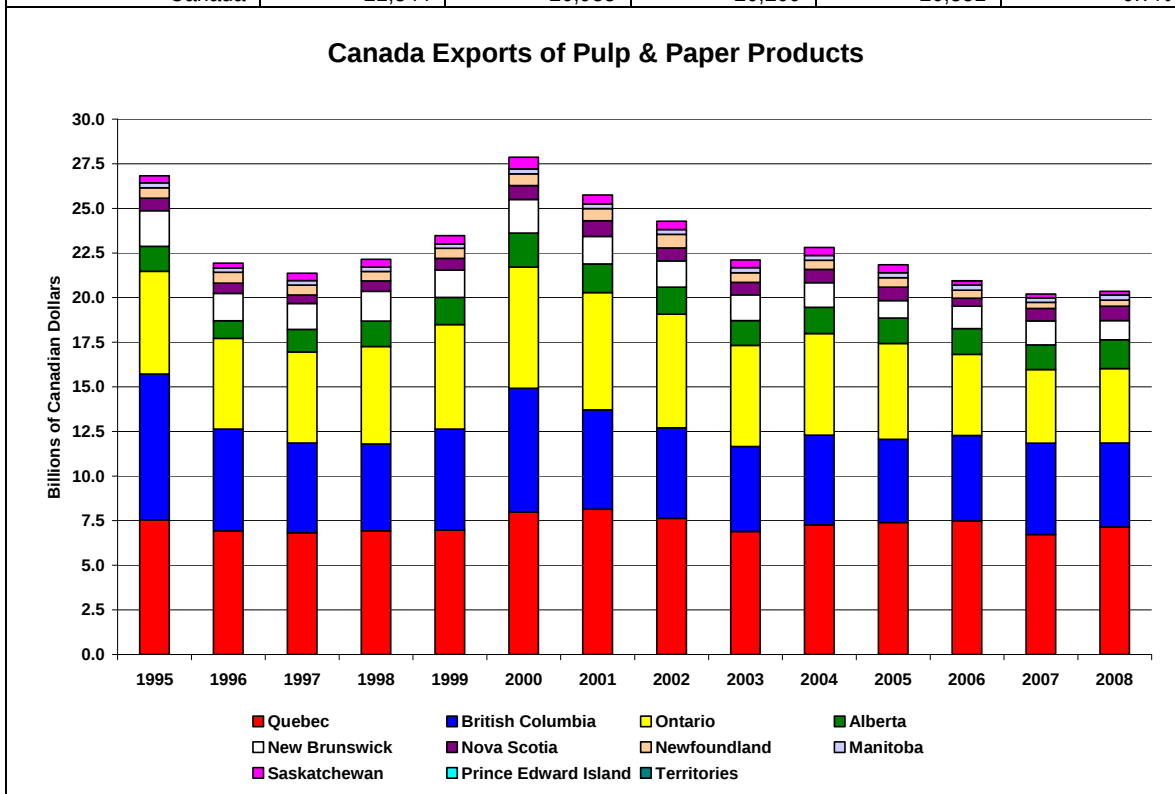
Saskatchewan is home to the world's first closed-loop, liquid effluent-free hardwood pulp mill. Up until 2006, two pulp mills operated in the province: one mill in Prince Albert (pulp and paper), and one mill in Meadow Lake (pulp only). The Prince Albert mill closed in 2006, and while the plant was sold, it has not been operational since it closed its doors.

Saskatchewan's only operating pulp mill, located in Meadow Lake, has an annual production capacity of 375,000 (air dried) metric tons. This mill produces 17 grades of pulp (pulp from aspen and softwoods, and printing and writing paper grades).

With the closure of Prince Albert's pulp and paper mill, exports of pulp and paper from Saskatchewan dropped 47% in 2006. Since then, Saskatchewan has represented only 1% of total pulp and paper exports from Canada.

Canada Exports of Pulp & Paper Products by Province, millions of Canadian Dollars

	2005	2006	2007	2008	% Change (07-08)
Quebec	7,401	7,488	6,724	7,152	6.4%
British Columbia	4,657	4,788	5,121	4,699	-8.2%
Ontario	5,378	4,544	4,116	4,171	1.3%
Alberta	1,415	1,446	1,388	1,609	15.9%
New Brunswick	976	1,261	1,342	1,089	-18.9%
Nova Scotia	763	441	701	804	14.6%
Newfoundland	526	448	341	337	-1.1%
Manitoba	286	289	260	282	8.4%
Saskatchewan	437	230	214	207	-3.3%
Prince Edward Island	5	1	1	1	-11.1%
Territories	0	0	0	0	-80.4%
Canada	21,844	20,938	20,209	20,351	0.7%

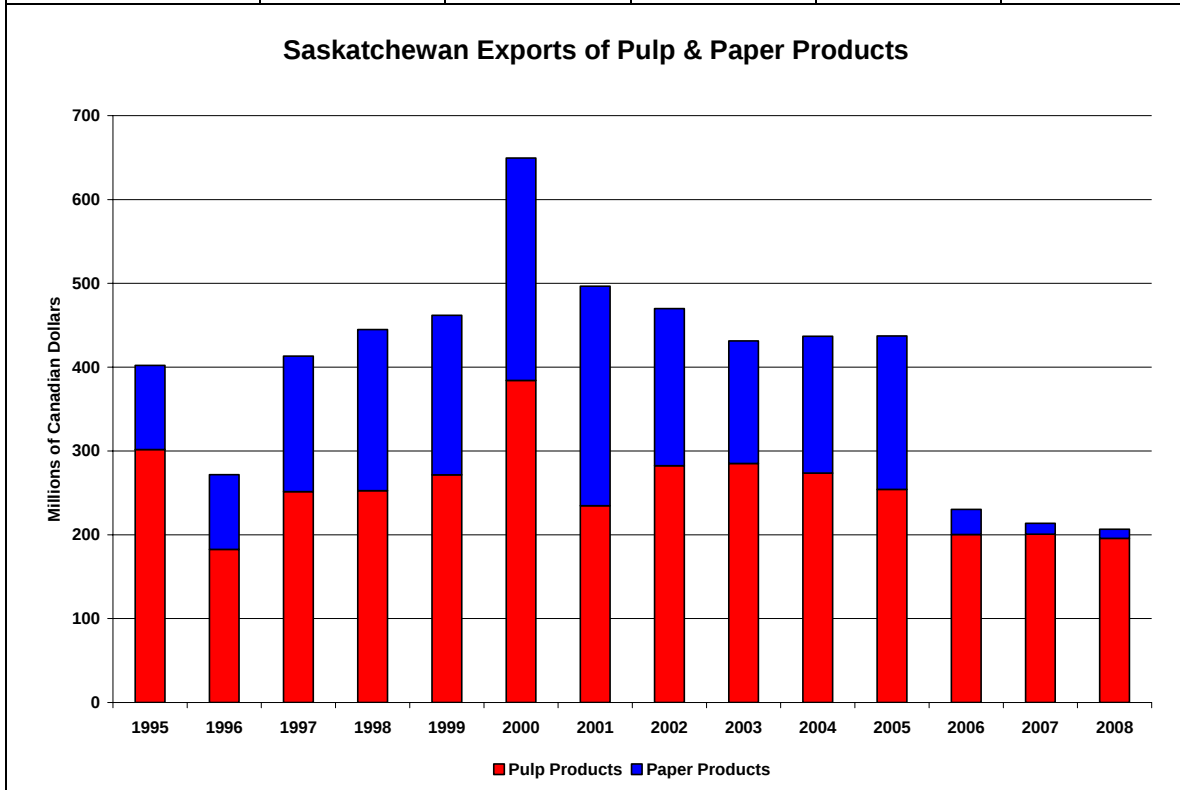


Source: Global Trade Information Services, Inc.

A decline in paper product exports from Saskatchewan (due to the closure of the Prince Albert pulp and paper mill in 2006) has been the contributing factor to the decrease in the province's total pulp and paper exports. Since 2000, pulp exports have declined 23%, while paper exports have declined 94%.

Saskatchewan Exports of Pulp & Paper Products, million of Canadian Dollars

	2005	2006	2007	2008	% Change (07-08)
Pulp Products	254.21	200.46	200.58	195.81	-2.4%
Paper Products	182.95	29.89	13.22	10.93	-17.3%
Total	437.16	230.35	213.80	206.74	-3.3%

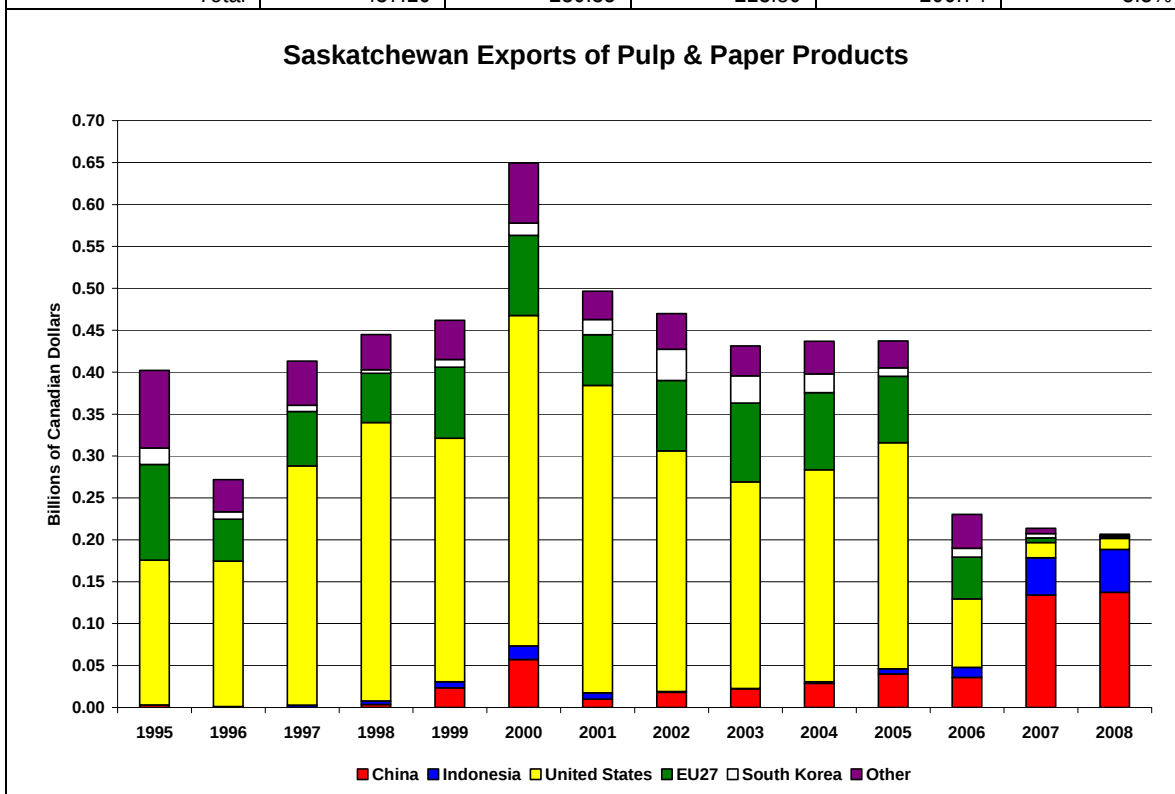


Source: Global Trade Information Services, Inc.

Pulp is a global business, and as such the Saskatchewan's pulp production is sold globally. Prior to 2007, the majority of pulp and paper products produced in the province were sold to the US. However, since 2007, Indonesia and China have become strong buyers.

Saskatchewan Exports of Pulp & Paper Products, millions of Canadian Dollars

	2005	2006	2007	2008	% Change (07-08)
United States	40.23	35.70	134.14	137.28	2.3%
China	5.99	12.21	44.60	51.35	15.1%
Japan	269.65	81.81	18.19	12.91	-29.0%
South Korea	79.15	49.80	5.34	1.72	-67.9%
EU27	10.19	10.34	5.22	1.45	-72.3%
Other	31.96	40.49	6.32	2.03	-67.8%
Total	437.16	230.35	213.80	206.74	-3.3%



Source: Global Trade Information Services, Inc.

SASKATCHEWAN PULP PRODUCTS



Photo Credit: FPInnovations

Saskatchewan is a relatively small player on a national level with respect to pulp production and exports. The province represents 3% of the nation's export shipments, which are primarily to the US.

PULP PRODUCTS PRODUCTION CAPACITY

Saskatchewan's capacity for pulp production is spread across two mills: one in Meadow Lake, and another in Prince Albert. The Prince Albert pulp (and paper) mill closed its doors in 2006. This mill was sold, but has not been operational since 2006. When operational, the mill produced 345,000 (air dried) metric tons of pulp. Pulp produced was paper grade northern bleached softwood kraft (NBSK) and bleached hardwood kraft (BHKP).

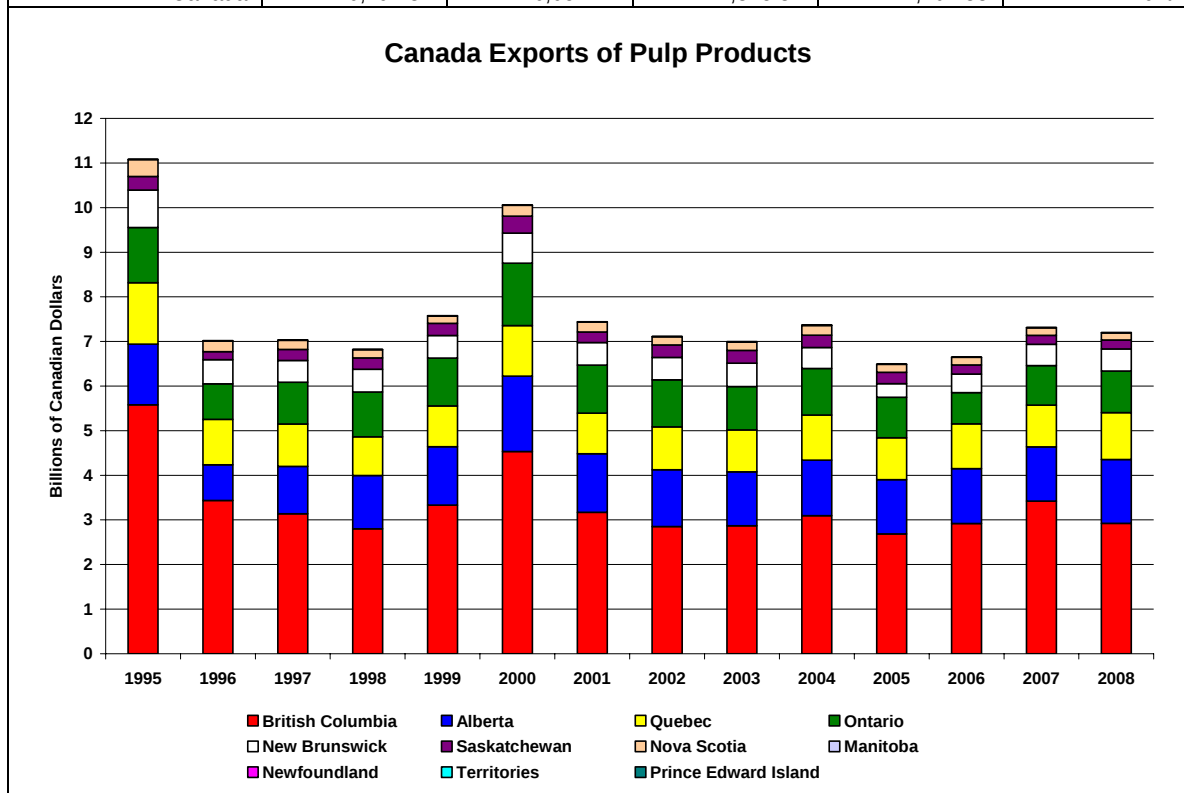
Saskatchewan's only operating pulp mill (constructed in 1990 in Meadow Lake), has an annual production capacity of 375,000 (air dried) metric tons (two lines of bleached – chemo – thermal – mechanical pulp). This mill produces 17 grades of pulp (pulp from aspen and softwood, and printing and writing paper grades).

PULP PRODUCTS EXPORTS

Pulp exports from Saskatchewan represent approximately 3% of Canada's total pulp shipments. This is a slight drop from 4% in 2005. In 2008, export sales of pulp products by Saskatchewan was valued at \$196 million.

Canada Exports of Pulp Products by Provinces, millions of Canadian Dollars

	2005	2006	2007	2008	% Change (07-08)
British Columbia	2,688.11	2,919.33	3,423.02	2,924.66	-14.6%
Alberta	1,212.73	1,232.17	1,211.46	1,429.03	18.0%
Quebec	940.99	1,005.00	938.40	1,051.04	12.0%
Ontario	906.91	699.58	885.45	931.72	5.2%
New Brunswick	307.42	413.99	478.49	497.59	4.0%
Saskatchewan	254.21	200.46	200.58	195.81	-2.4%
Nova Scotia	174.92	172.79	171.12	165.24	-3.4%
Manitoba	6.03	8.39	6.96	6.65	-4.4%
Newfoundland	0.00	0.00	0.13	0.14	5.9%
Territories	0.00	0.01	0.14	0.01	-90.9%
Prince Edward Island	0.04	0.03	0.07	0.01	-92.6%
Canada	6,491.37	6,651.74	7,315.82	7,201.88	-1.6%

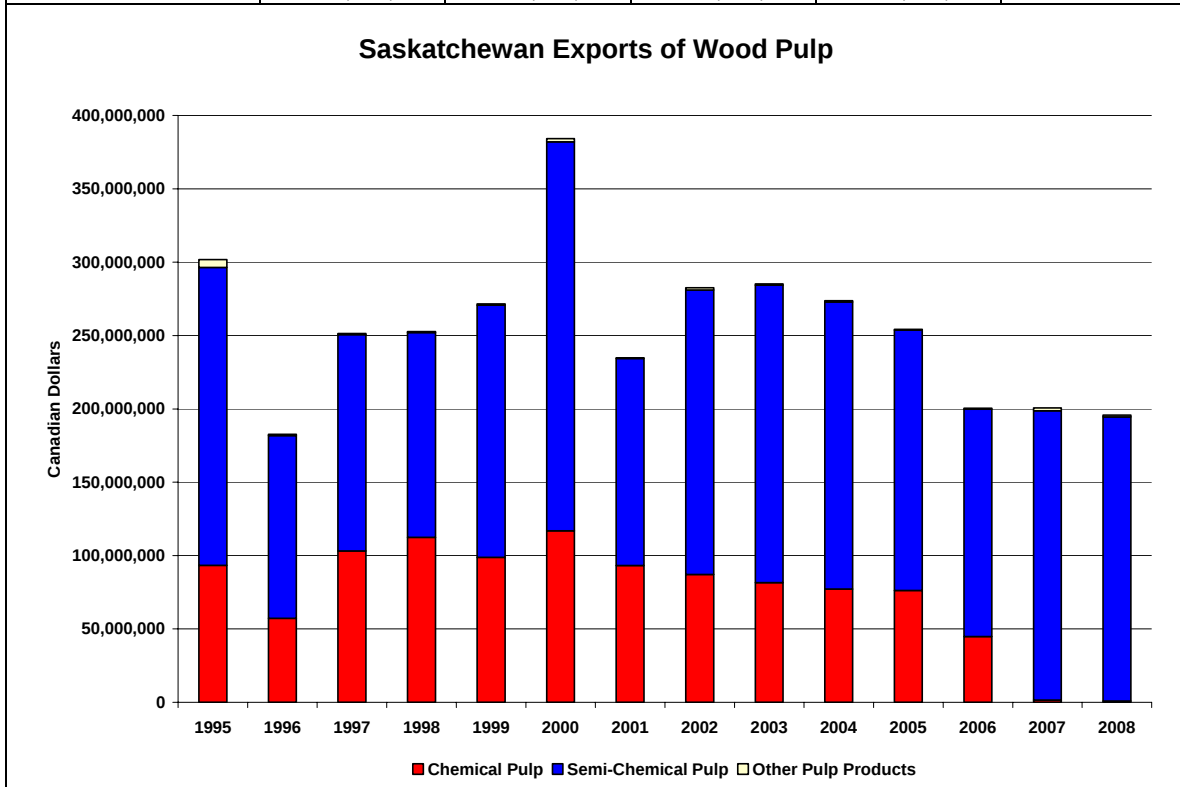


Source: Global Trade Information Services, Inc.

Pulp exports from Saskatchewan are almost exclusively that of semi-chemical pulp (98%).

Saskatchewan Exports of Wood Pulp, Canadian Dollars

	2005	2006	2007	2008	% Change (07-08)
Chemical Pulp	76,289,098	44,731,834	1,517,321	768,628	-49.3%
Semi-Chemical Pulp	177,367,247	155,005,281	197,181,850	193,767,893	-1.7%
Other Pulp Products	558,010	724,393	1,882,816	1,271,563	-32.5%
Total	254,214,355	200,461,508	200,581,987	195,808,084	-2.4%

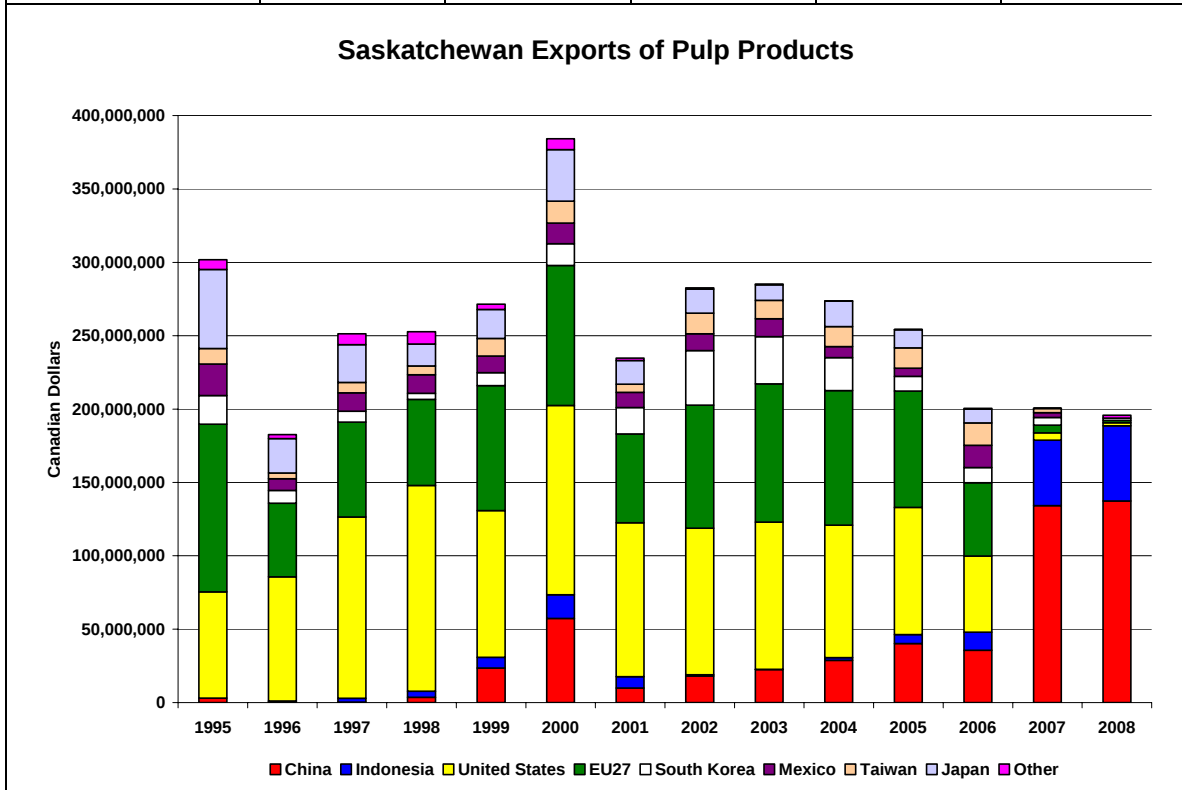


Source: Global Trade Information Services, Inc.

The US has been the dominant importer of Saskatchewan's pulp products up until 2005. Since then, China and Indonesia have become primary buyers of pulp manufactured in Saskatchewan.

Saskatchewan Exports of Pulp Products, millions of Canadian Dollars

	2005	2006	2007	2008	% Change (07-08)
China	40.23	35.70	134.14	137.28	2.3%
Indonesia	5.99	12.21	44.60	51.35	15.1%
United States	86.82	52.05	5.03	2.01	-60.0%
EU27	79.13	49.78	5.30	1.69	-68.0%
South Korea	10.19	10.34	5.22	1.45	-72.3%
Mexico	5.42	15.28	3.26	0.00	-100.0%
Taiwan	13.81	15.17	2.75	0.00	-100.0%
Japan	12.51	9.36	0.28	0.00	-100.0%
Other	0.11	0.57	0.00	2.03	-
Total	254.21	200.46	200.58	195.81	-2.4%



Source: Global Trade Information Services, Inc.

SASKATCHEWAN PAPER PRODUCTS



Photo Credit: The Edge Forest Business Magazine

The only paper mill in Saskatchewan is located in Prince Albert. Also a pulp mill, the paper mill was added to the facility in 1988. Saskatchewan's Prince Albert pulp and paper mill closed its doors indefinitely in 2006. Since this time, the paper mill has been permanently closed.

PAPER PRODUCTS PRODUCTION CAPACITY



Photo Credit: © 2008 Jupiterimages Corporation

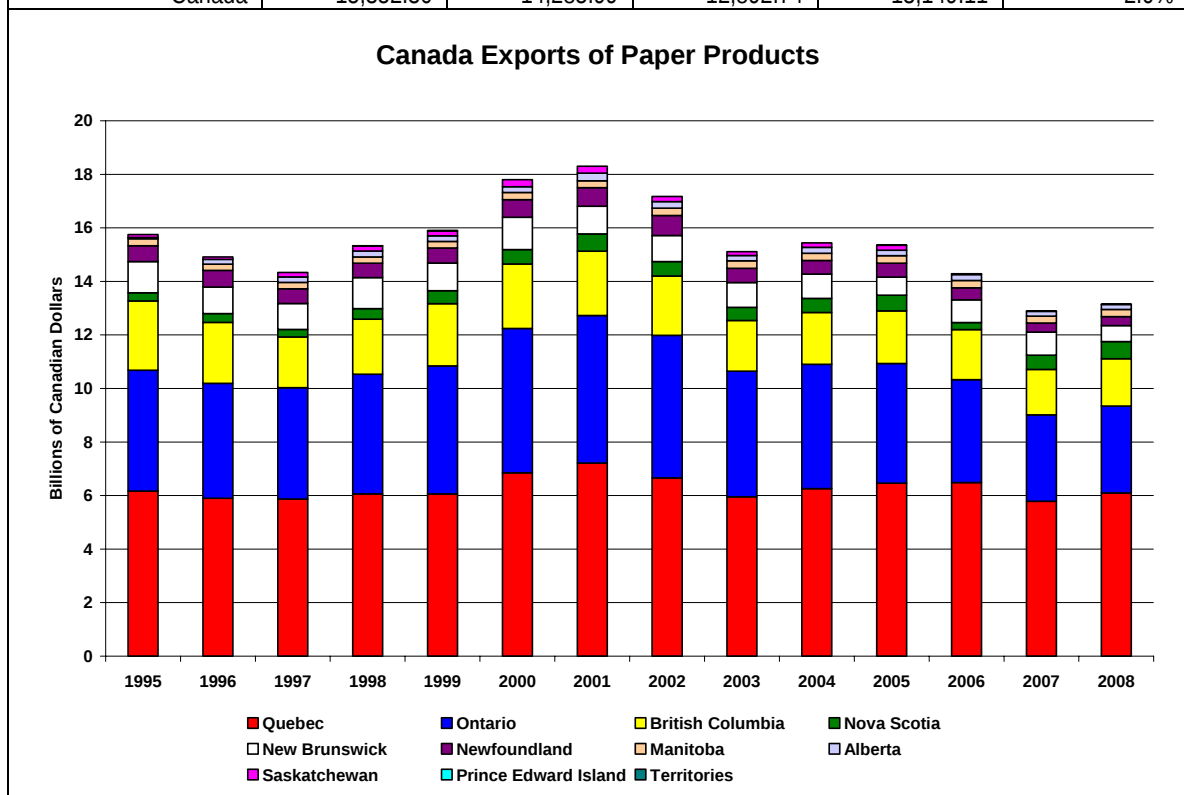
Up until 2006, Saskatchewan's only paper mill (now closed) had a capacity to produce 250,000 short tons of paper. Paper produced was uncoated wood-free sheet in various grades for business and printing uses. While the mill was sold, it has yet to reopen.

PAPER PRODUCTS EXPORTS

With only one paper mill, Saskatchewan has held a small percentage of Canada's exports of paper products. Exports have essentially become negligible since 2006 when the paper mill shut down.

Canada Exports of Paper Products by Provinces, millions of Canadian Dollars

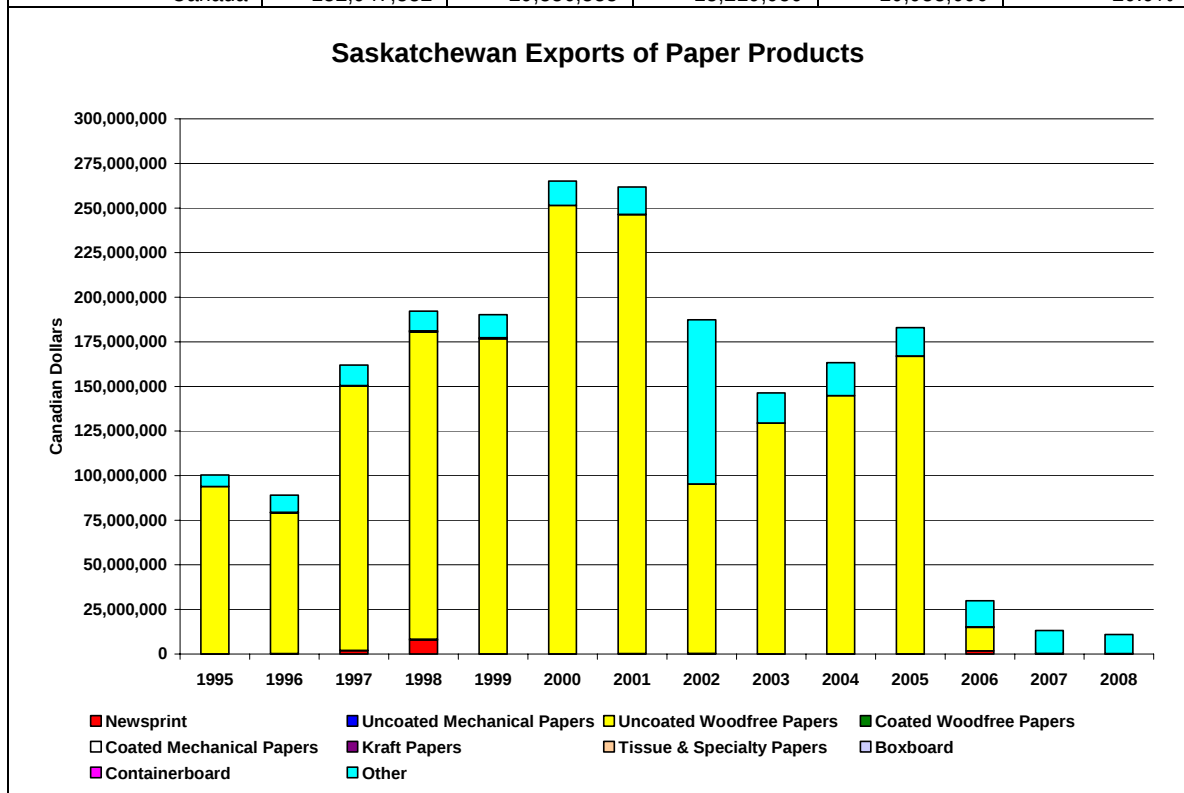
	2005	2006	2007	2008	% Change (07-08)
Quebec	6,460.36	6,483.35	5,785.49	6,100.94	5.5%
Ontario	4,470.90	3,844.17	3,230.06	3,239.25	0.3%
British Columbia	1,968.58	1,869.16	1,698.44	1,774.61	4.5%
Nova Scotia	588.37	268.56	530.27	638.74	20.5%
New Brunswick	668.16	846.92	863.59	591.41	-31.5%
Newfoundland	526.19	448.01	340.92	337.14	-1.1%
Manitoba	279.56	280.19	252.78	275.00	8.8%
Alberta	202.08	214.24	177.04	180.25	1.8%
Saskatchewan	182.95	29.89	13.22	10.93	-17.3%
Prince Edward Island	5.14	1.37	0.86	0.82	-4.6%
Territories	0.00	0.14	0.07	0.03	-58.7%
Canada	15,352.30	14,285.99	12,892.74	13,149.11	2.0%



Source: Global Trade Information Services, Inc.

Saskatchewan Exports of Paper Products, Canadian Dollars

	2005	2006	2007	2008	% Change (07-08)
Newsprint	110,442	1,804,459	90,859	59,266	-53.3%
Uncoated Mechanical	14,761	0	142,962	151,677	5.7%
Uncoated Woodfree	166,796,153	13,206,979	23,382	0	-
Coated Woodfree	0	23,976	0	0	-
Coated Mechanical	0	0	0	0	-
Kraft Papers	68,518	35,300	0	0	-
Tissue & Specialty Ppr	6,544	0	0	0	-
Boxboard	22,055	0	25,326	0	-
Containerboard	11,465	125,746	7,378	0	-
Other Paper Products	15,917,394	14,690,378	12,930,052	10,722,147	-20.6%
Canada	182,947,332	29,886,838	13,219,959	10,933,090	-20.9%



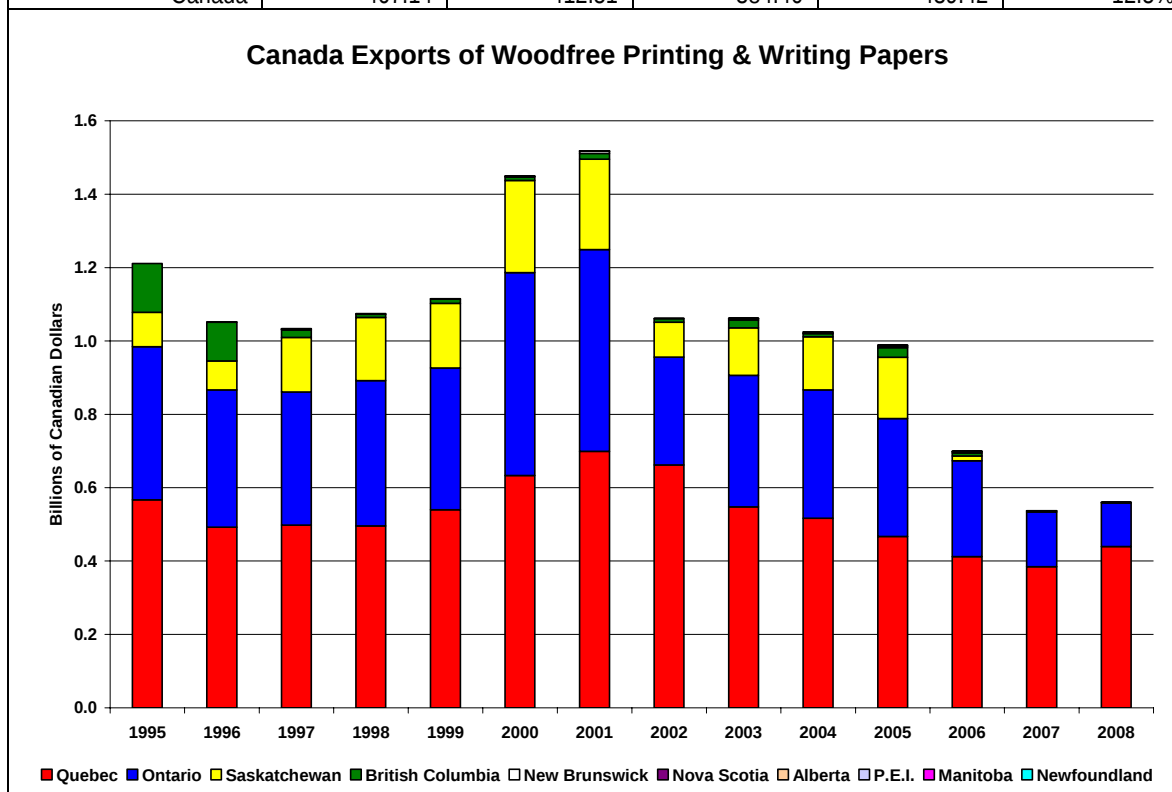
Source: Global Trade Information Services, Inc.

UNCOATED WOOD-FREE PRINTING & WRITING PAPERS

Prior to the paper mill closing in 2006, Saskatchewan's exports of uncoated, wood-free printing and writing papers ranked third in the country (behind Quebec and Ontario).

Canada Exports of Uncoated Woodfree Printing & Writing Papers, millions of Canadian Dollars

	2005	2006	2007	2008	% Change (07-08)
Quebec	467.14	412.51	384.40	439.42	12.5%
Ontario	321.73	260.56	149.46	119.19	-25.4%
Saskatchewan	166.80	13.21	0.02	0.00	-
British Columbia	25.80	8.45	2.66	1.43	-86.2%
New Brunswick	3.91	3.27	0.54	0.00	-
Nova Scotia	2.80	1.35	0.22	0.11	-101.7%
Alberta	0.21	0.15	0.11	0.14	23.1%
P.E.I.	0.10	0.17	0.02	0.02	-1.1%
Manitoba	0.06	0.22	0.01	0.00	-1982.5%
Newfoundland	0.00	0.00	0.00	0.00	-
Quebec	988.55	699.88	537.45	560.31	4.1%
Canada	467.14	412.51	384.40	439.42	12.5%



Source: Global Trade Information Services, Inc.

SASKATCHEWAN'S ADVANCED WOOD PRODUCTS SECTOR



Credit: www.naturallywood.com

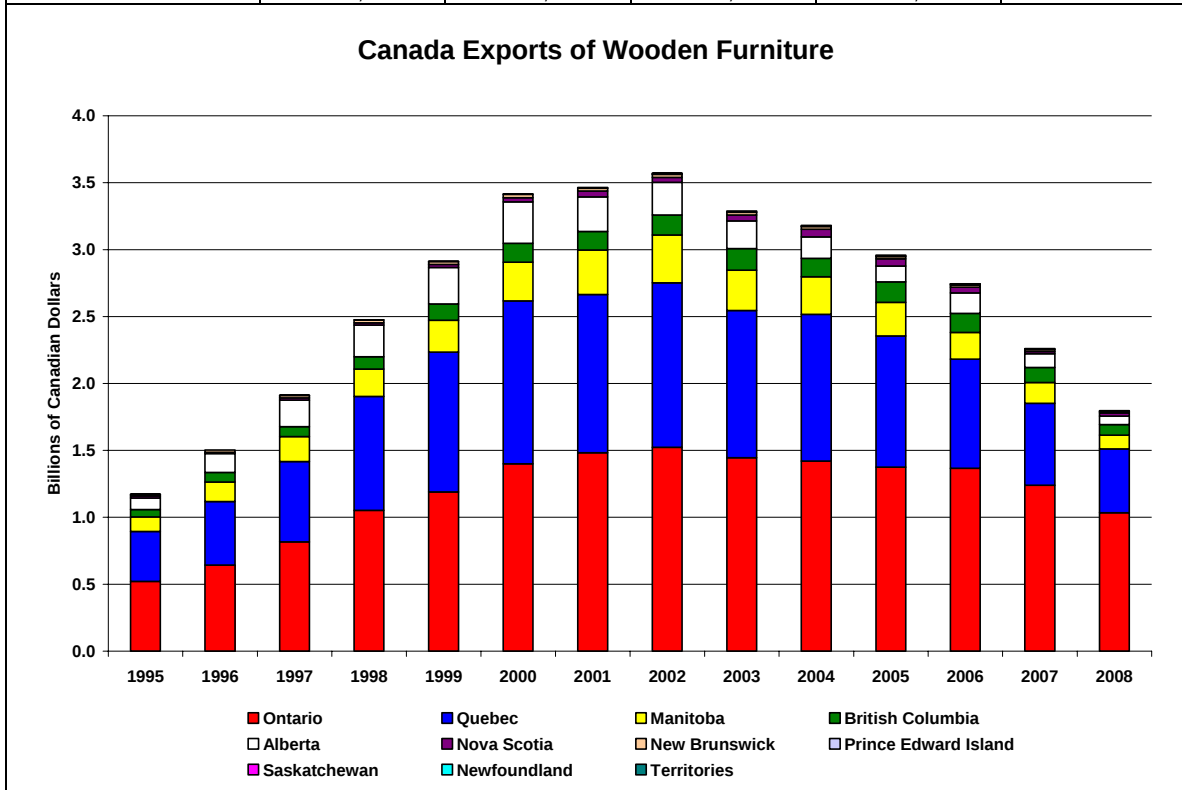
Based on a 2002/03 study, Saskatchewan is home just over 250 advanced wood manufacturers. This sector consists of manufacturers producing prefabricated buildings, cabinets, engineered building components, millwork and finished products, specialty items, and remanufactured products.

WOODEN FURNITURE

Since 2006, Saskatchewan exports of wooden furniture have been negligible (as a percentage of total Canadian exports of wooden furniture).

Canada Exports of Wooden Furniture by Provinces, millions of Canadian Dollars

	2005	2006	2007	2008	% Change (07-08)
Ontario	1,374.14	1,366.54	1,239.66	1,033.52	-16.6%
Quebec	979.69	814.71	612.05	476.59	-22.1%
Manitoba	251.69	201.31	155.20	102.80	-33.8%
British Columbia	153.75	142.03	112.42	79.44	-29.3%
Alberta	117.63	153.09	103.38	64.26	-37.8%
Nova Scotia	54.62	42.44	16.55	24.40	47.5%
New Brunswick	17.27	15.14	13.83	9.90	-28.4%
Prince Edward Island	4.61	6.39	5.24	5.71	9.0%
Saskatchewan	5.26	2.73	1.74	0.85	-51.1%
Newfoundland	0.63	0.71	0.32	0.05	-85.0%
Territories	0.00	0.02	0.01	0.01	111.9%
Total	2,959.30	2,745.10	2,260.38	1,797.54	-20.5%

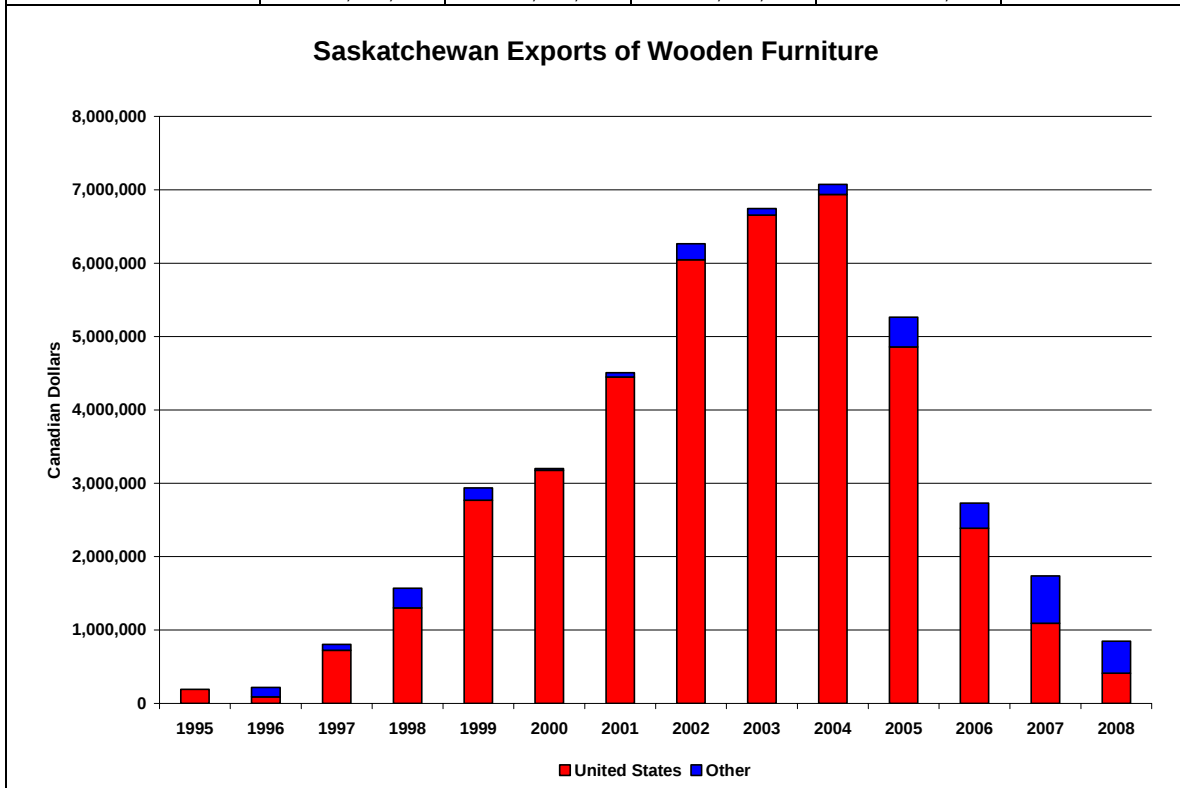


Source: Global Trade Information Services, Inc.

Of the small amount that is exported from Saskatchewan, the US has been the province's primary consumer of wooden furniture. However, in 2008, countries outside of the US (notably the Cayman Islands and Bermuda) have imported more wooden furniture from Saskatchewan than the US did. Exports to the US declined 62% from 2007 to 2008.

Saskatchewan Exports of Wooden Furniture, Canadian Dollars

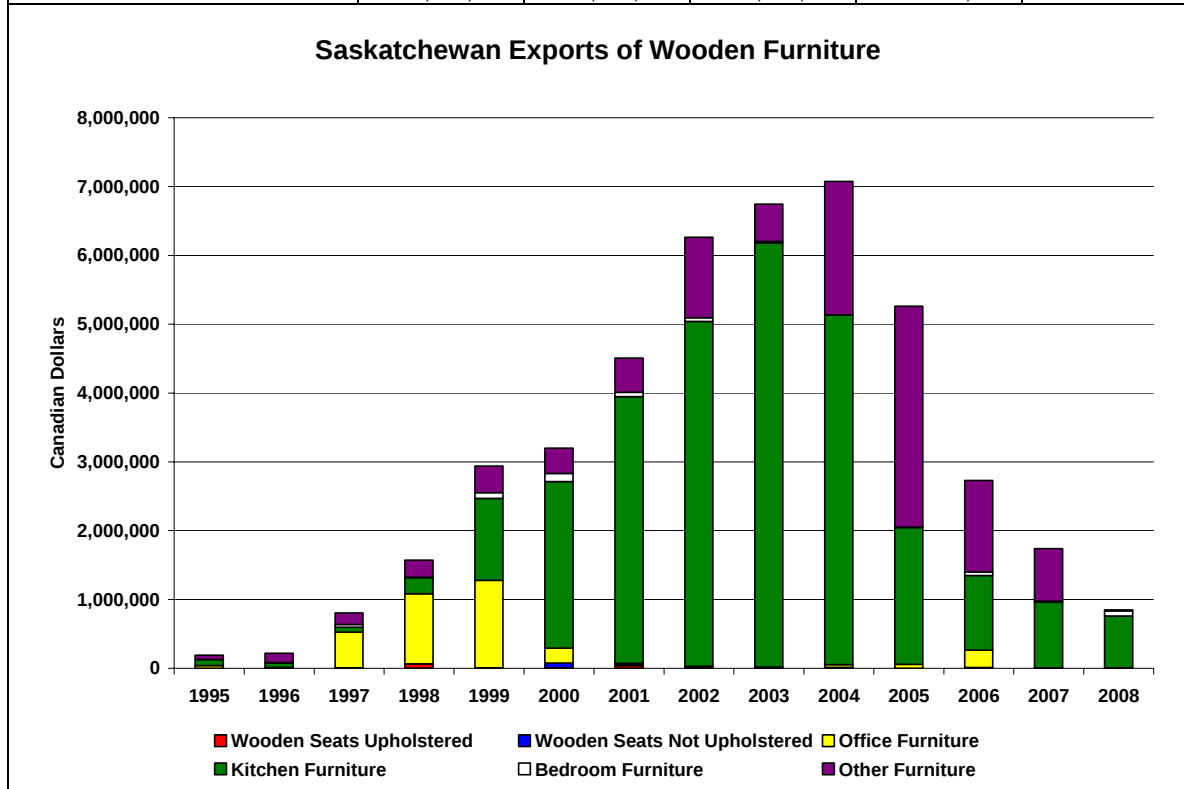
	2005	2006	2007	2008	% Change (07-08)
United States	4,859,142	2,386,808	1,092,058	410,388	-62.4%
Other	404,075	342,564	645,114	438,636	-32.0%
Total	5,263,217	2,729,372	1,737,172	849,024	-51.1%



Source: Global Trade Information Services, Inc.

Saskatchewan Exports of Wooden Furniture, Canadian Dollars

	2005	2006	2007	2008	% Change (07-08)
Wooden Seats Upholstered	0	7,066	0	0	-
Wooden Seats Not Upholstered	0	5,735	0	0	-
Office Furniture	58,194	251,133	4,891	6,540	33.7%
Kitchen Furniture	1,986,246	1,084,338	956,675	754,083	-21.2%
Bedroom Furniture	10,498	52,722	14,528	74,080	409.9%
Other Furniture	3,208,279	1,328,378	761,078	14,321	-98.1%
Total	5,263,217	2,729,372	1,737,172	849,024	-51.1%



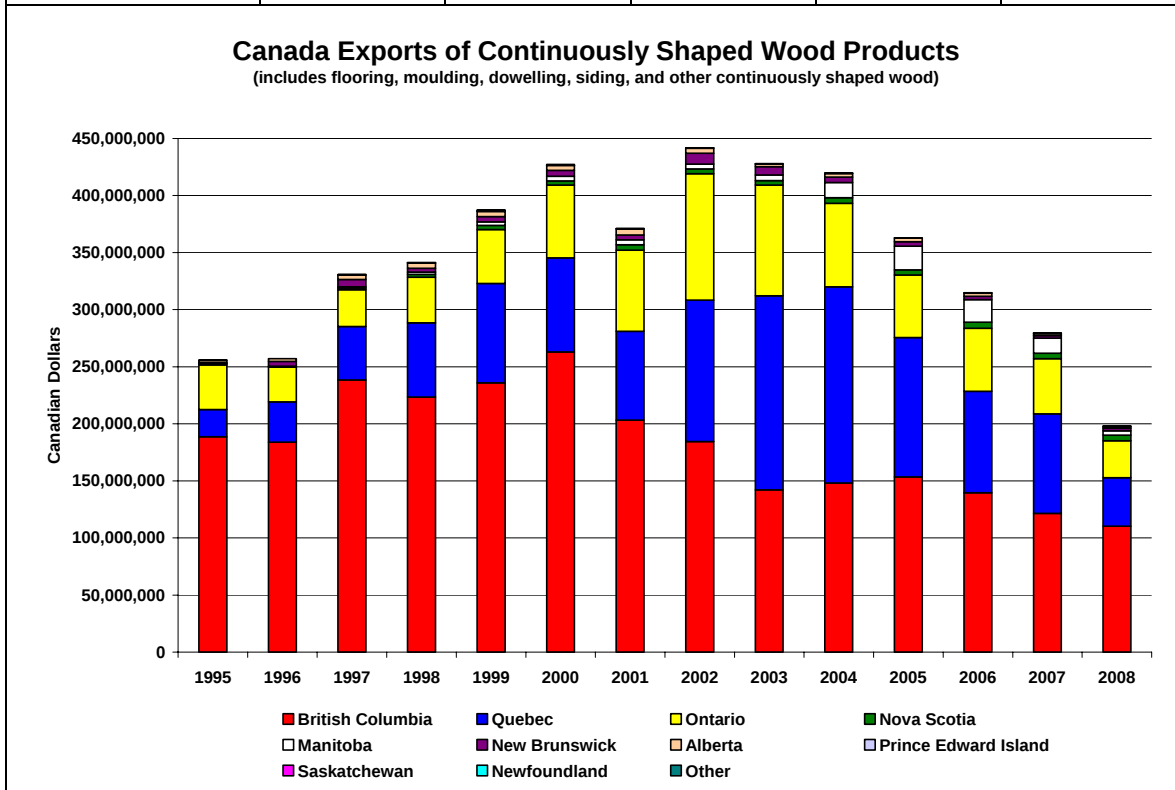
Source: Global Trade Information Services, Inc.

CONTINUOUSLY SHAPED WOOD PRODUCTS

Continuously shaped wood products consist of products such as flooring, moulding, dowelling and siding. With respect to trade, Saskatchewan holds a very small percentage of Canada's exports of continuously shaped wood products. British Columbia and Quebec have been Canada's top exporting provinces for this segment. Continuously shaped wood product exports overall by all provinces have fallen since peaking in 2002.

Canada Exports of Continuously Shaped Wood Products, millions of Canadian Dollars

	2005	2006	2007	2008	% Change (07-08)
British Columbia	153.52	139.70	121.46	110.32	-9.2%
Quebec	122.01	88.71	87.27	42.38	-51.4%
Ontario	54.85	55.38	48.31	32.49	-32.8%
Nova Scotia	4.53	5.20	4.82	4.88	1.2%
Manitoba	20.73	19.71	13.13	3.81	-71.0%
New Brunswick	3.94	3.07	2.36	2.17	-8.1%
Alberta	3.27	2.68	1.57	1.55	-1.1%
Prince Edward Island	0.08	0.25	0.60	0.22	-63.1%
Saskatchewan	0.07	0.11	0.02	0.18	650.8%
Newfoundland	0.00	0.01	0.01	0.01	13.3%
Territories	0.00	0.00	0.01	0.00	-100.0%
Total	363.01	314.82	279.56	198.01	-29.2%



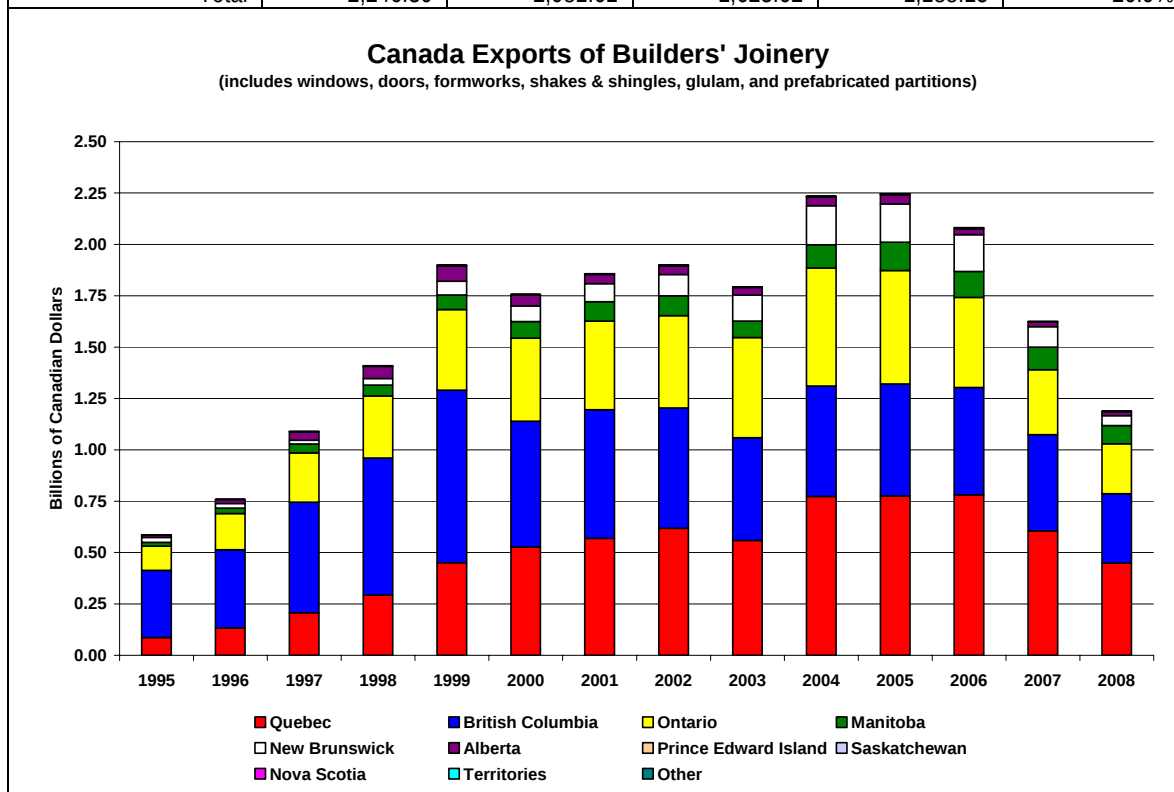
Source: Global Trade Information Services, Inc.

BUILDERS' JOINERY

Builders' joinery consists of products such as windows, doors, formworks, shakes and shingles, glulam, and prefabricated partitions. Similar to continuously shaped wood products, Saskatchewan's exports of builders' joinery represent a small portion of Canada's total exports – less than 1%. Quebec and British Columbia continue to be Canada's dominating provinces with respect to builders' joinery exports. Exports of builders' joinery from Saskatchewan peaked in 2006, but have since dropped by more than half.

Canada Exports of Builders' Joinery, millions of Canadian Dollars

	2005	2006	2007	2008	% Change (07-08)
Quebec	775.42	781.03	606.04	449.17	-25.9%
British Columbia	545.04	522.88	468.07	337.92	-27.8%
Ontario	552.57	438.05	315.12	242.13	-23.2%
Manitoba	136.97	126.09	110.90	89.43	-19.4%
New Brunswick	186.94	178.52	99.59	48.38	-51.4%
Alberta	44.81	28.84	22.99	18.91	-17.7%
Prince Edward Island	0.54	0.33	0.37	0.88	137.4%
Saskatchewan	2.01	3.49	0.74	0.58	-22.3%
Nova Scotia	1.22	1.92	1.28	0.46	-63.7%
Territories	0.62	0.45	0.50	0.27	-47.2%
Newfoundland	0.17	0.00	0.01	0.02	87.7%
Total	2,246.30	2,081.61	1,625.62	1,188.15	-26.9%



Source: Global Trade Information Services, Inc.

A vertical strip on the left side of the cover features a close-up, slightly blurred image of tall, thin blades of grass in shades of green and yellow.

**WOOD
MARKET
STATISTICS**

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Pulp and Paper*

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in **SASKATCHEWAN**