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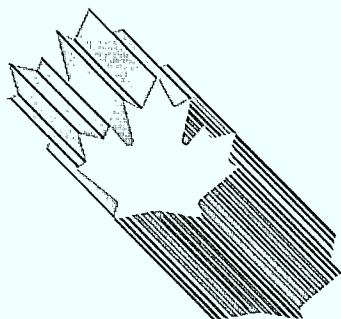


Industry, Science and
Technology Canada

Industrie, Sciences et
Technologie Canada

Softwood Lumber

Canada



INDUSTRY PROFILE SOFTWOOD LUMBER

1988

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BIBLIOTHEQUE
MINISTERE DE L'EXPANSION
INDUSTRIELLE REGIONALE

FOREWORD

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In a rapidly changing global trade environment, the international competitiveness of Canadian industry is the key to survival and growth. This Industry Profile is one of a series of papers which assess, in a summary form, the current competitiveness of Canada's industrial sectors, taking into account technological and other key factors, and changes anticipated under the Canada-U.S. Free Trade Agreement. Industry participants were consulted in the preparation of the papers.

The series is being published as steps are being taken to create the new Department of Industry, Science and Technology from the consolidation of the Department of Regional Industrial Expansion and the Ministry of State for Science and Technology. It is my intention that the series will be updated on a regular basis and continue to be a product of the new department. I sincerely hope that these profiles will be informative to those interested in Canadian industrial development and serve as a basis for discussion of regional trends, prospects and strategic directions.

Minister

1. Structure and Performance

Structure

The softwood lumber industry is a major nation-wide industrial sector in terms of sales, employment, and export earnings; it consists of sawmills and planing mills which convert softwood logs to lumber. Canada is the world's largest exporter of softwood lumber, with some 50 percent of international trade and 15 percent of world production. Lumber production totalled an estimated 54.2 million cubic metres (22.9 billion board feet) in 1986. The total value of shipments was \$5.5 billion, of which some \$4.9 billion was exported.

An important by-product, pulp chips, valued at \$1.4 billion in 1986, and other residual by-products such as hog fuel and shavings (\$200 million) are a source of raw material for other wood-based industries. In 1985, for example, purchased pulp chips accounted for some 46 percent of raw material supply to the pulp and paper industry.

Direct employment was about 56 000 people in lumber manufacturing and 35 000 in related harvesting and forest management operations.

The softwood lumber industry is based on an extensive renewable resource and can be divided into two major sectors: the *spruce-pine-fir* (SPF) sector which extends from the interior of British Columbia to Newfoundland and accounts for about 77 percent of total production; and the *B.C. coast* sector comprising the hemlock-fir (Hem-Fir), Douglas fir (DF) and western red cedar (WRC) sub-sectors which account respectively for eleven, six and five percent of total output. Eastern pine, western Sitka spruce and yellow cedar are specialty species sub-sectors and account for the one percent balance. About 90 percent of Canada's softwood timber reserves are owned and administered by the provinces.

Regionally, production is located as follows: British Columbia (61 percent), Quebec (20 percent), Ontario (nine percent), Alberta (five percent) and New Brunswick (three percent). The remaining two percent is produced in the other provinces and territories. In British Columbia, production is about 72 percent SPF and 28 percent coastal species. Other provinces produce almost all SPF lumber. The industry is widely dispersed across Canada in some 1325 establishments, according to Statistics Canada. However, this figure does not include a large number of very small sawmills which often are operated only on a periodic basis and which in aggregate account for an estimated one percent of total sector lumber output.

Approximately 225 major companies operating about 365 sawmills account for more than 95 percent of total production. An estimated 25 large integrated forest products companies account for about 50 percent of total production; however, no one company dominates the market. Provincial Crown corporations represent about three percent of sector ownership.

Although the industry is predominantly Canadian-owned, a small number of large firms are foreign-owned and account for nearly one-fifth of productive capacity. They are largely concentrated in western Canada.

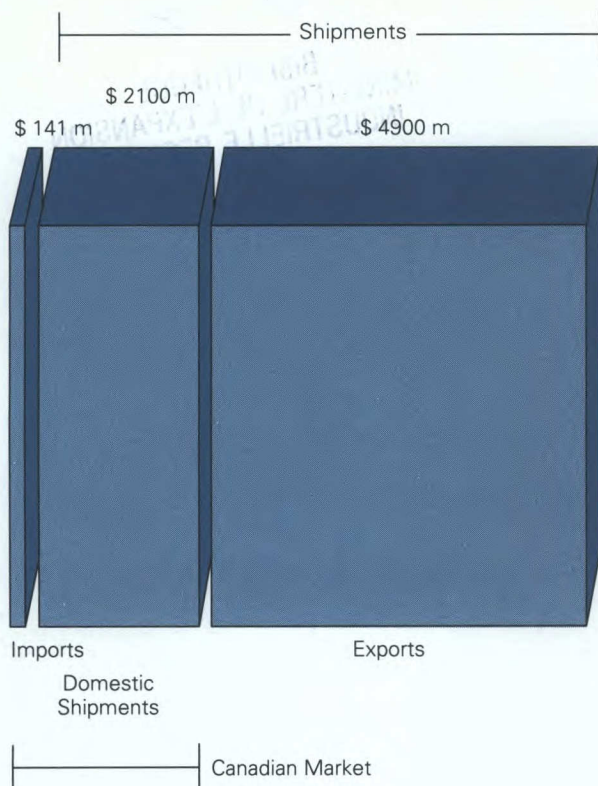
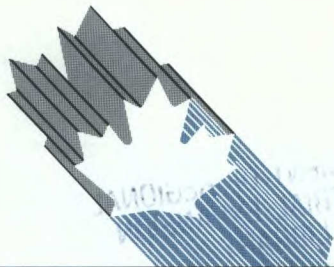
About 75 percent of industry production workers are unionized. Collective bargaining in eastern Canada is more fragmented than in the West, where unions typically have larger memberships.

Canada



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**Imports, Exports and Domestic Shipments
1986**

The industry is highly export-oriented: 69 percent in terms of volume. The major export market is the United States, which consumed nearly 60 percent of Canadian production volume in 1986. Imports from Canada are estimated at 30 percent of the total U.S. consumption of 48 billion board feet. Another nine percent of production volume was exported to offshore markets in Japan, the European Community (principally the United Kingdom), the Middle East, North Africa, Australia, and the People's Republic of China (P.R.C.). U.S. producers are Canada's principal competitors in the United States, Japan, Australia, and the P.R.C. In the European Community (E.C.), the Middle East, and North Africa, Scandinavian and Soviet exporters are the principal competitors to Canadian exporters.

The Canadian industry supplies about 95 percent of the domestic market which consumes about 31 percent * of production. Softwood lumber imports, valued at \$141 million in 1986, include items for re-export, mainly to overseas markets, and species not indigenous to Canada that are used for millwork. A large portion of these re-exports are shipped from British Columbia.

* Including chips & residues.

Performance

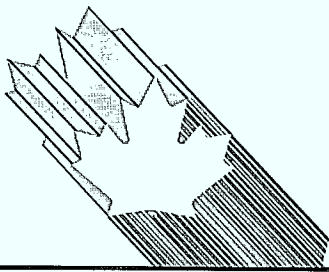
During the 1970s, considerable expansion of production and rationalization of facilities occurred and international competitiveness was enhanced. Over this decade, the number of establishments reported by Statistics Canada has declined 26 percent, reflecting a trend towards larger, more capital-intensive sawmills, while production and exports increased 60 percent and 67 percent respectively.

This rapid growth can be attributed to high levels of lumber demand for housing in North America and the technological development of systems enabling the economic processing of small-diameter logs at high lineal-feed rates. Expansion in the B.C. interior, Quebec and Alberta was made easier through integration with the pulp and paper sector, which has provided an increasingly important source of revenue from pulp chips for the sawmills.

In 1981 and 1982, the industry in all regions went through the deepest market downturn in 40 years. Heavy losses occurred and the debt load was greatly increased. During this period, the trading environment in North America was highly competitive with prices depressed because of oversupply and reduced consumption levels. The high value of the Canadian and U.S. dollars in relation to other foreign currencies led to a loss in competitiveness in offshore markets and additional lumber availability for the North American market. As a result, many Canadian firms faced a tenuous financial situation.

During the mid-1980s lumber markets recovered. Record output levels were established each year from 1983 to 1986, despite a prolonged labour dispute in British Columbia which reduced 1986 production levels in that province. Production in 1986 was 24 percent higher than in 1980, while employment declined by about 7000. Together, these statistics indicate a significant increase in labour productivity. Capacity utilization was more than 90 percent in 1986, up from a low of 68 percent in 1982.

Between 1984 and 1986, the substantial competitive advantage provided by the relatively low value of the Canadian dollar in terms of the U.S. dollar allowed the domestic industry to increase exports to the United States significantly. At the same time, the weakening of the Canadian dollar vis-à-vis other foreign currencies enhanced competitiveness in most overseas markets. During 1986 and the first half of 1987, prices and export volumes showed marked improvement. As a result, financial operating results have improved significantly during the last two years. In 1987, the volume of exports to the United States increased by nearly 2.8 percent over 1986.



A review of corporate investment in the wood industries, including softwood lumber, during the first half of the 1980s shows that capital investment in 1985 was 24 percent below 1981 levels. However, reflecting the cyclical nature of the industry, there has been substantial recovery and it is estimated capital and repair expenditures in 1987 exceeded \$750 million or close to 33 percent above 1981 levels.

2. Strengths and Weaknesses

Structural Factors

The scale of lumber manufacturing operations in Canada compares favourably with that in other producing countries. Economic mill size varies greatly and is governed by log availability, raw material characteristics and forest location relative to the sawmill, as well as the regional demand for pulp chips. For the most part, sawmills with annual capacities greater than 50 000 cubic metres are more efficient than smaller units. There are about 325 mills of this capacity or greater in Canada. While these mills represent about 25 percent of the total number, they account for about 95 percent of estimated total industry capacity.

The large number of small sawmills have a limited impact on total capacity but can process pockets of resource unattractive to larger organizations. They often produce specialties or service regional markets and provide employment in numerous single-industry communities. The majority are located in central and eastern Canada. In addition, there are a number of mills on the coast of British Columbia carrying out custom cutting and this is growing. Further rationalization will likely continue to occur in all regions, but mostly in central and eastern Canada.

The industry benefits from proximity to the U.S. market which consumes about 60 percent of Canadian softwood lumber production. Fifty-four percent of these exports are shipped from British Columbia. However, it is also very sensitive to North American residential construction activities, which tend to be highly cyclical. Exports of lumber to the United States are largely in the standard construction sizes and manufactured in highly productive SPF mills in the B.C. interior and other provinces east of the Rockies. The non-SPF B.C.-coast producing region has relatively high raw material and manufacturing costs and the production of standard construction lumber is more costly in general than SPF construction lumber. However, these higher costs are somewhat offset by the production of higher value goods which allow these mills to be commercially viable.

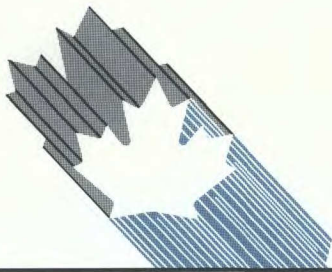
The Canadian industry is cost-competitive in U.S. northern states as well as eastern and western seaboard markets. This advantage, provided primarily by the favourable exchange rate, has also been a contributing factor in Canadian producers' penetration of more remote market regions. The 1985 U.S. International Trade Commission Section 332 investigation report concluded that productivity of sawmills in Canada was somewhat higher than in the United States due to technology and wood supply. While keen competition will likely continue from the U.S. south producing region because of its proximity to large consumer markets, SPF lumber is often preferred over southern yellow pine for residential construction. Also, future production growth in the south may be restrained by wood supply problems resulting from more attractive alternative land use.

Transportation costs are a major factor in the delivered price of lumber. Many Canadian producers, especially in British Columbia and Alberta, are located at greater distances from key markets and, therefore, face higher transportation costs than their competitors. A well-developed network of distribution centres and reload facilities has been developed. These, along with competitive overland transportation costs, have minimized the transportation disadvantages and enabled British Columbia interior, Alberta and certain eastern Canadian mills to continue to participate in the U.S. market. Softwood lumber shippers from the B.C.-coast producing region are able to utilize competitive foreign, waterborne shipping to the U.S. eastern seaboard. Because of the U.S. *Jones Act*, their competitors in the U.S. Pacific northwest must utilize the higher-cost U.S. shipping. As well, specialized large-volume ships with long-term chartering arrangements have enabled British Columbia mills to compete in overseas markets.

Wood costs on a delivered mill basis are considered, on the whole, to be competitive with those in the United States. However, as a result of decreasing log diameters, together with increasing distances between harvesting and mill sites, Canadian lumber production costs tend to be on the rise.

Nationally, the sustainable rate of forest harvest based on sound forest management principles is considered sufficient to support the present level of lumber production. While in most regions the industry is operating at the upper limit of economic wood supply, some increased level of forest harvest may be possible for the SPF sub-sectors in the B.C. interior and Alberta.

Better forest management techniques and silvicultural practices should, in the future, increase the rate of forest production and subsequently allow for a higher annual allowable cut.



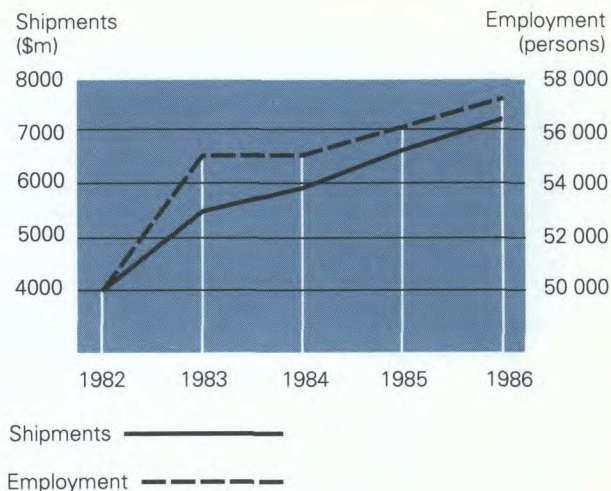
In the short to medium term, the large SPF sector has little scope to diversify from construction usage to further manufactured products of higher value because of inherent species characteristics and the highly specialized production facilities. Upgrading through end and edge gluing as well as production of stress-rated lumber is providing some opportunities. Lodgepole pine is a species that offers potential over the longer term for use in European joinery markets. There is also potential for specialty construction products. The B.C.-coast sub-sectors have valuable species and more flexible production facilities which lend themselves to the production of higher-valued cuttings and offer potential for product upgrading. Investment in kiln drying facilities and secondary manufacturing plants is needed to facilitate this trend.

Trade-related Factors

In general, non-tariff barriers and currency exchange relationships are of greater concern than tariffs. Exceptions include the eight percent tariff on planed whitewood (SPF) in Japan, the four percent E.C. tariff on planed Canadian Standard lumber, the 15 percent tariff in Korea and significant tariffs on structural sizes in Australia, all of which have a significant impact on Canada's export potential.

Until June of 1986, the United States and Canada were considered by the Canadian industry to jointly comprise a common duty-free market for almost all sizes and grades of softwood lumber, even though on certain lumber products representing a small percentage of current trade, tariffs of up to 15 percent apply. The Canadian industry held a strong competitive position in the United States which was enhanced by the currency exchange rate. The Canadian share of total U.S. consumption in 1985 was approximately 33 percent, as compared to 28 percent in the early 1980s.

In June 1986, in the face of increased lumber imports from Canada, a countervailing duty petition was submitted contending that Canadian lumber production was subsidized. The Canadian industry had successfully defended itself against a similar petition initiated by the U.S. industry in 1983. A settlement of the 1986 action was negotiated on December 30, 1986 between the Canadian and U.S. governments, in which Canada agreed to impose an export charge of 15 percent on certain softwood lumber products being exported to the United States, to be applied as of January 8, 1987. This Memorandum of Understanding (MOU) also stated that this charge could be reduced or eliminated by increases in stumpage fees and other provincial charges on softwood lumber production. Both governments must consult and agree on the value any changes represent in relation to the export charge.



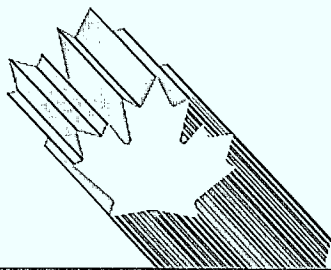
Total Shipments and Employment

On December 16, 1987, the governments of Canada and the United States agreed to amend the MOU incorporating several changes. As of December 1, 1987, the export charge was eliminated on softwood lumber first milled in British Columbia; a regional exemption for the four Atlantic provinces was granted from January 1, 1988. Effective April 1, 1988, exports to the United States of softwood lumber produced in Quebec is subject to the reduced export charge of eight percent. The twenty individual company exclusions were cancelled at the end of 1987. Lumber manufactured from logs originating in the United States is exempt from the export charge to an annual limit of 365 million board feet. Several remanufactured products were added to the current list which specifies that the export charge will be calculated on the raw material cost rather than the final sales price.

The export charge has either been eliminated or significantly reduced on more than 80 percent of Canada's exports of softwood lumber to the United States.

An additional issue involves possible revisions to U.S. standards on strength and physical performance of lumber which are currently being developed. As part of ongoing co-operation, the Canadian industry's "in-grade" testing project on the engineering properties of lumber is being co-ordinated with similar work in the United States to ensure that Canadian lumber will meet the new standards when adopted.

With respect to the European Community, major factors which impact on trade in softwood lumber include: a four-percent duty on planed construction lumber, whereas European free-trade area countries have duty-free entry; the difference between European building codes and product standards and North American ones; some phytosanitary import regulations; and the potentially accelerated harvest of acid-rain-damaged forests in some E.C. countries.



The key issues in lumber trade with Japan include the eight percent tariff on imports of planed whitewood (SPF) and Japanese building codes, which, for example, do not accept platform frame construction for three-storey, horizontally separated apartment buildings.

Important positive elements of the Canada-U.S. Free Trade Agreement (FTA) are the establishment of new trade remedy procedures and a bi-national dispute settlement mechanism. Applicable tariffs will be eliminated over a five-year period. The MOU on softwood lumber will not be affected by the FTA as it is specifically "grandfathered".

Technological Factors

During the 1970s, the Canadian industry achieved an international reputation for technological development with the high-speed processing of small-diameter logs which allowed increased throughput and improved productivity. More recently, technological development has tended to shift to the Scandinavian industry, where advanced micro-electronic-assisted processing equipment is being used more extensively than in Canada or the United States to optimize lumber yield and maximize product value.

At the present time, the industry is adapting existing technology in the face of increasing wood costs and intense competition. Emphasis is being placed on maximizing product value and optimizing yield from wood input, rather than the past thrust which was directed primarily toward higher labour productivity. There is also considerable scope to achieve a higher degree of energy self-sufficiency in the industry by use of waste material as fuel.

Other Factors

The Co-operative Overseas Market Development Program (COMDP) was established several years ago to diversify the market base of the wood products industry in British Columbia through the development of offshore markets. The COMDP is jointly funded by the federal and B.C. governments and the provincial wood products industry represented by the Council of Forest Industries of British Columbia. A tripartite agreement was concluded in 1985 to launch a similar five-year project for the Quebec industry. Consequently, offshore market development will continue to be an important industry thrust.

The Forest Sector Advisory Council (FSAC), made up of industry and labour representatives, provides input to policy development on a range of issues. The Federal-Provincial Forest Industries Development Committee (FIDC) meets twice yearly to discuss forest industry policy issues and programs at the federal and provincial government levels.

3. Evolving Environment

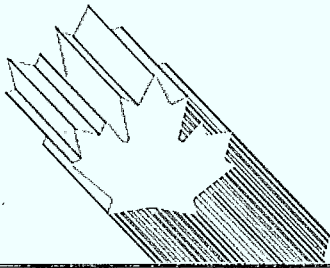
The current consumption trend is in a minor decline. Private sector forecasts suggest annual U.S. lumber consumption will decline to 1985 levels by 1990 (44.9 billion feet). This will undoubtedly have some effect for producers, particularly when recently increased costs in several regions are taken into consideration. Recovery is expected to follow in 1992 when U.S. consumption is projected to reach and surpass the record high level of 1987 estimated at 49 billion board feet.

While softwood lumber will probably remain cost-competitive in relation to alternative construction materials, additional growth in demand will likely depend on new product development for increased industrial and non-residential construction use, which appears to offer potential.

Current forecasts anticipate that growth in overseas markets will continue, over the medium to longer term, albeit at a slower rate than during the current year. The value of the Canadian dollar against other currencies will continue to be a key factor in export sales. In the longer run, developing economies such as China, Korea, India and North Africa will become increasingly important markets. Further development of traditional offshore markets is also required in order to pursue new and higher-value end uses.

Resource supply parameters are changing, wood costs are rising; consequently, there is a continuing need for industrial adaptation and modernization of production facilities to maximize material yield and product value. The potential for an increase in supply will only be realized through better silvicultural practices, improved lumber yield and the use of less economically attractive resources located far away from processing facilities. Investment in advanced equipment and processes, however, will likely take place as the industry continues to keep abreast of changing technology and market conditions. Additional integration with the pulp and paper and other wood products sectors is also likely in the ongoing effort to achieve further economies with improved raw material utilization.

Research and the application of new technology can be expected to increase, given the emphasis placed on these activities by both government and industry. It is also expected that the level of industrial energy self-sufficiency will continue to grow with the increased use of sawmill and forest waste as a fuel source. Over the longer term, a new generation of reconstituted and composite wood products for structural applications utilizing new manufacturing techniques could replace sawn-lumber products to some degree. In addition, there is a trend towards secondary products and components for use in both construction and millwork applications. The final outcome of "in-grade" testing research work in the United States and Canada could have a considerable bearing on residential structural designs, and non-residential building uses for lumber.



The principal impact of the FTA will be on the enhanced security of access and more stable trading environment provided by the new trade remedy procedures and dispute settlement mechanisms. While the Memorandum of Understanding (MOU) of December 30, 1986 concerning softwood lumber products has been grandfathered under the agreement, the new dispute settlement mechanism is expected to provide greater protection from any future arbitrary and unfair application of U.S. trade laws. The elimination of remaining tariffs will enhance the competitiveness of the products affected, and remove tariff impediments to industry to take advantage of new opportunities by upgrading products.

4. Competitiveness Assessment

While competitive positions vary with currency exchange fluctuations, SPF structural lumber producers in most provinces have competitive delivered costs to most U.S. markets. SPF lumber is often preferred over southern yellow pine for residential construction even in the southern United States. The SPF producers generally have competitive manufacturing costs, and are highly specialized to produce standard structural lumber sizes. Except for producers in British Columbia, the SPF sector tends to have a high proportion of production in narrow widths and short lengths of lumber. This, as well as material characteristics, suggest that opportunities for product diversification and upgrading of SPF are less likely to occur in provinces other than British Columbia.

While the above competitive situation has existed for the past few years despite significant cost increases applied to Canadian production, some industry representatives have expressed the concern that increased costs, such as the export charge on certain shipments to the United States and provincial replacement measures, will have a more significant impact during future market downturns.

In offshore markets for structural lumber, SPF producers in regions relatively close to tidewater are generally competitive, but face tariff and non-tariff barriers such as lack of full acceptance of Canadian sizes and grades within building codes.

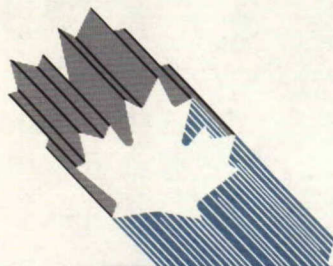
Given its valuable wood species, the B.C.-coast lumber industry is competitive in certain regions of the United States and in offshore markets such as the European Community and Japan, and in its higher-valued lumber items and remanufacturing grades. The region benefits from competitive waterborne transportation costs to the U.S. east coast and overseas markets. While most B.C.-coast mills also produce standard structural lumber, they are generally less competitive than the SPF producers in these grades because of the high cost of raw materials. However, considerable potential exists for product upgrading within the B.C.-coast sub-sectors.

The FTA will not have a significant direct impact on this industry. The establishment of new trade remedy procedures and a dispute settlement mechanism will provide more secure access to the U.S. market, and the elimination of remaining tariffs will enhance market access for existing and new products.

For further information concerning the subject matter contained in this profile, contact:

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PRINCIPAL STATISTICS

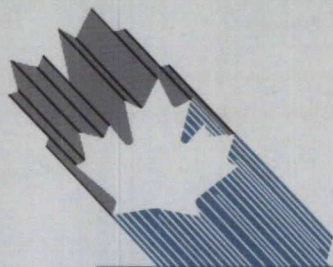
SIC(s) COVERED: 2512 (1980 basis)

	1973	1982	1983	1984	1985	1986
Establishments (e)	1 519	1 230	1 290	1 325	1 325	1 325
Employment (e)	60 000	50 000	55 000	55 000	56 000	56 900
Shipments (\$ millions)(e)	2 327	4 033	5 504	5 900	6 600	7 100
(Softwood lumber)	2 127	3 033	4 504	4 800	5 200	5 500
(Residues)	200	1 000	1 000	1 100	1 400	1 600
**Gross domestic product (constant 1981 \$ millions)	992	1 143	1 492	1 760	1 893	1 737
*Investment (\$ millions)	277	336	391	473	495	540
***Profits after tax (\$ millions)	187	-165	83	N/A	N/A	N/A
(% of income)	9.0	-4.8	1.9	N/A	N/A	N/A

TRADE STATISTICS

	1973	1982	1983	1984	1985	1986
Exports (\$ millions)	1 574	2 945	3 984	4 264	4 603	4 900
Domestic shipments (\$ millions) (e)(f)	753	1 088	1 520	1 636	1 997	2 100
Imports (\$ millions)	60	72	123	108	113	141
Canadian market (\$ millions)(e)	813	1 160	1 643	1 744	2 110	2 241
Exports as % of shipments (vol.)	69	75	72	76	73	69
Imports as % of domestic market (vol.)	6	5	6	5	5	5
Canadian share of international trade	38	46	50	N/A	N/A	N/A
Source of imports (% of total value)			U.S.	E.C.	Asia	Others
		1982	99	—	—	1
		1983	99	1	—	—
		1984	99	—	—	1
		1985	99	—	—	1
		1986	99	—	—	1
Destination of exports (% of total value)			U.S.	E.C.	Asia	Others
		1982	77	8	10	5
		1983	83	5	7	5
		1984	84	5	7	4
		1985	87	3	7	3
		1986	87	5	6	2

(continued)

**REGIONAL DISTRIBUTION — Average over the last 3 years**

	Atlantic	Quebec	Ontario	Prairies	B.C.
Establishments — % of total	19	31	18	6	26
Employment — % of total	4	22	10	7	57
Shipments — % of total	3	18	7	6	66

MAJOR FIRMS

Name	Ownership	Location of Major Plants
1. Canfor Corp., Vancouver	Public	British Columbia, Alberta
2. B.C. Forest Products Ltd., Vancouver	Public	British Columbia, Alberta
3. MacMillan Bloedel Ltd., Vancouver	Public	British Columbia
4. Noranda Forest Sales Inc., Toronto	Public	British Columbia, New Brunswick
5. Normick Perron Inc., La Sarre	Public	Quebec, Ontario
6. Domtar Inc., Montreal	Public	Quebec
7. J.D. Irving Ltd., Saint John	Private	New Brunswick

Figures shown represent percentages of reported sawmill and planing mill statistics by Statistics Canada since the total figures include the hardwood sawmilling sector:

- * 90%,
- ** 85%, and
- *** 100%.
- (e) Estimated
- (f) Includes chips and residues

Establishments: It should be noted that the inclusion of very small enterprises would at least double the number of establishments.

SIC: 2512: The Softwood Lumber and Planing Mill Industry also includes residual products such as: woodchips, sawdust and shavings, slabs, and hog fuel. Wood chips are considered as a significant by-product and statistics such as value of shipments are shown separately as residues. The other by-products are of much lesser significance.

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