

Kevin Merriam
Executive Director
Maritime Lumber Bureau

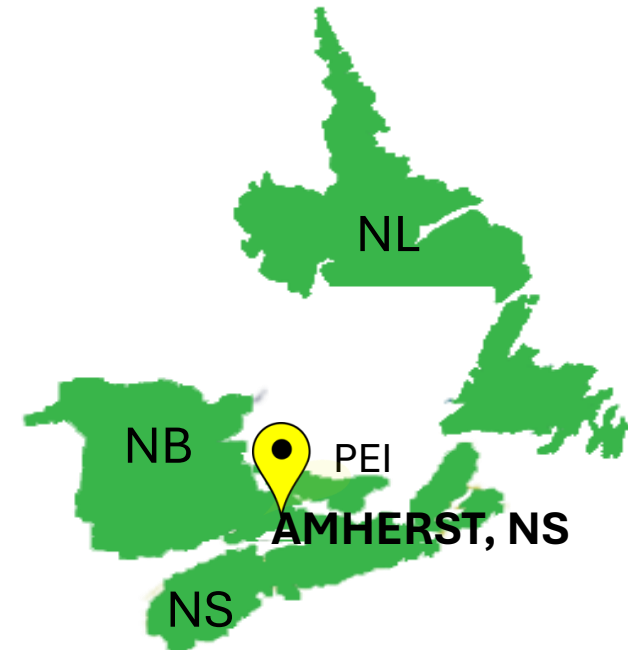
Opportunities and Challenges in a Rapidly Changing Sector

April 9 2025

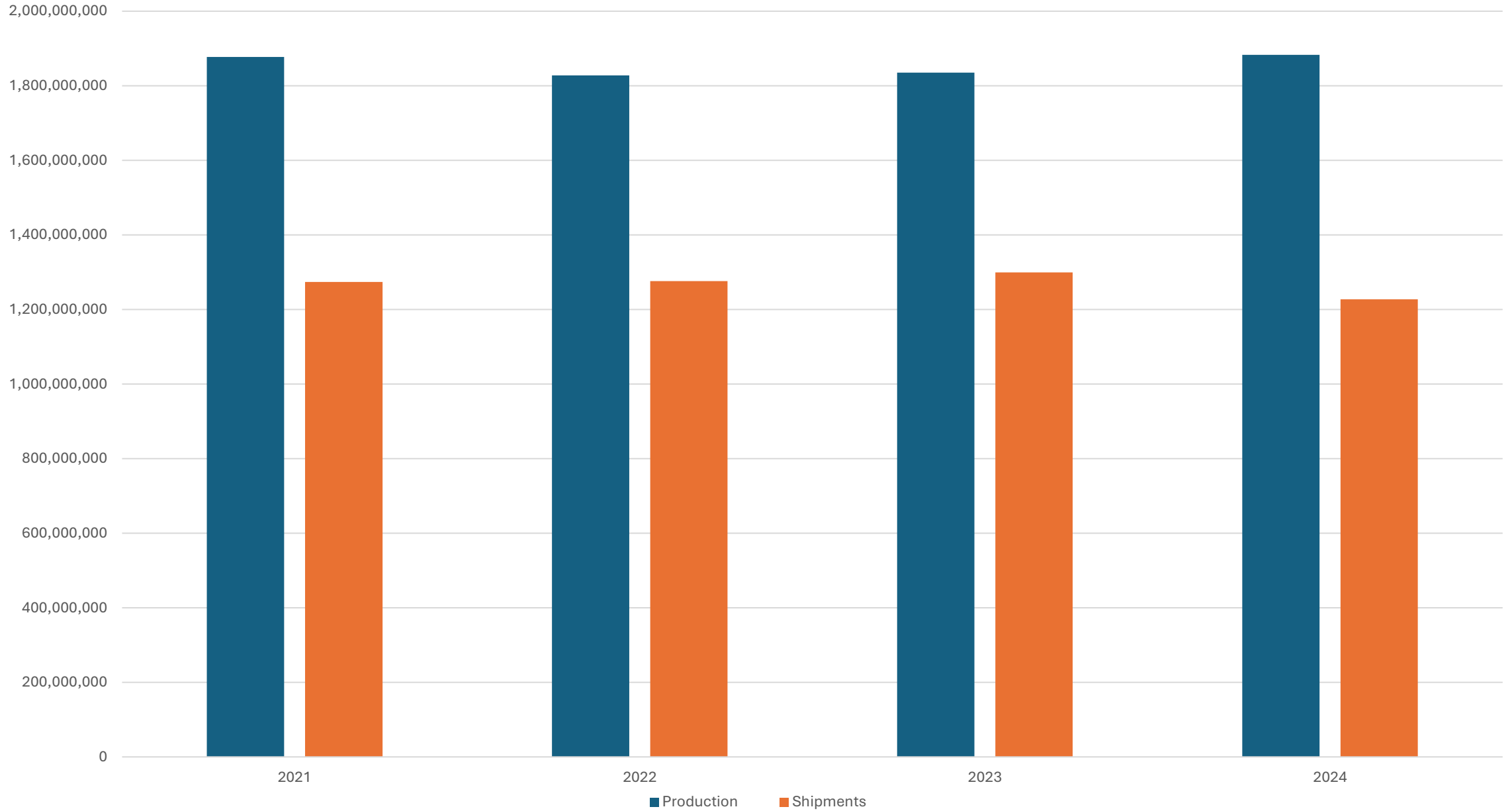


Maritime Lumber Bureau Membership

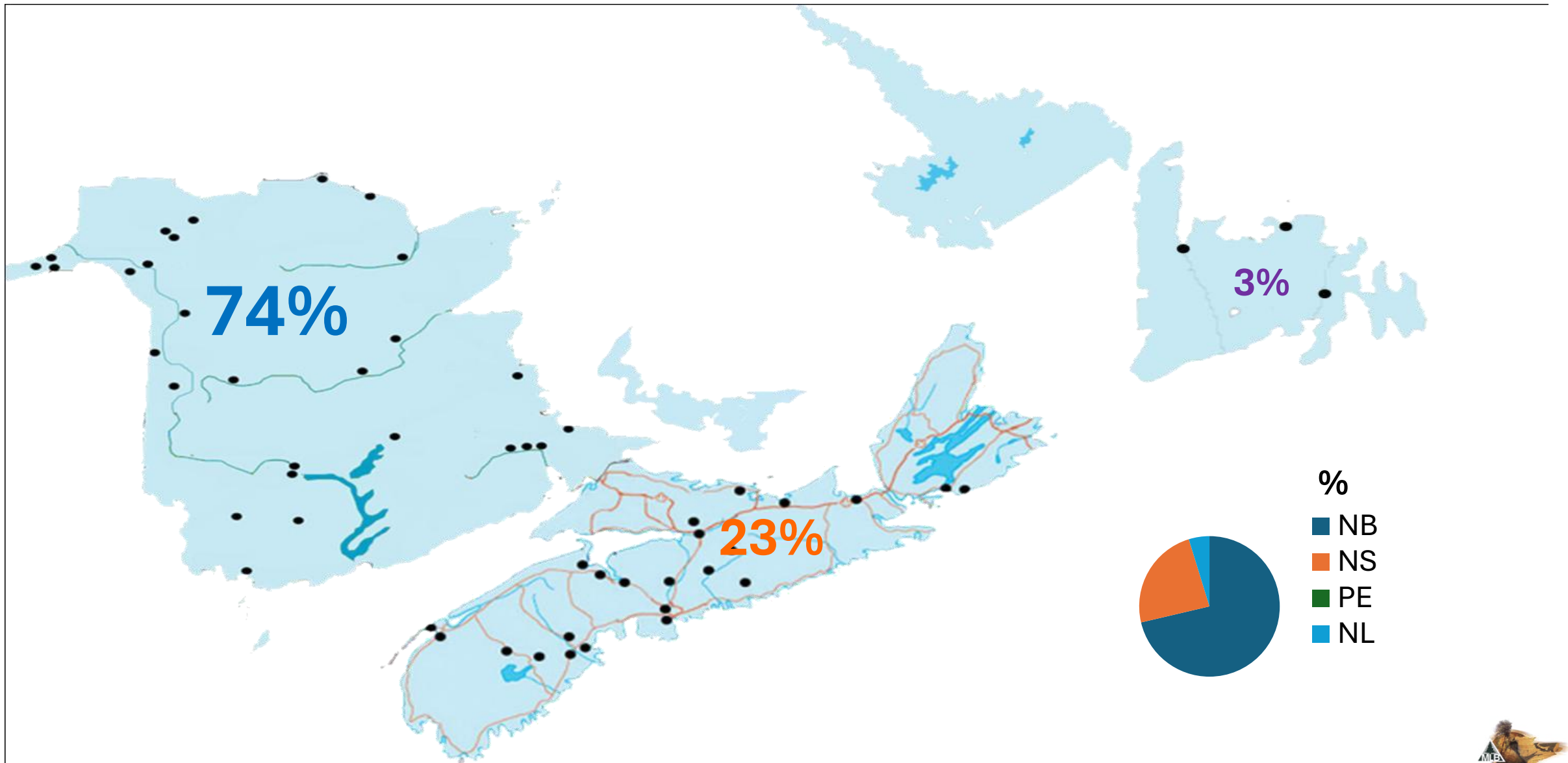
- Currently 97 Members
 - 6 Large Mills (> 100MMFBM)
 - 10 Medium Mills
(25 – 100 MMFBM)
 - 66 Small Mills
(Up to 25 MMFBM)
- 15 Producers “Other”
(Remans, wood packaging etc)



Atlantic Production vs U.S. Shipments



Provincial Percentage of Total Production



CANADIAN SHARE OF U.S. CONSUMPTION (2024)

	US Consumption (2024)	Canadian Imports (2024)	Canadian Share
Softwood Lumber (BBF)	49.80	12.00	24.10

	Fifth Administrative Review Final Results CURRENTLY IN EFFECT			Sixth Administrative Review Preliminary Results DO NOT TAKE EFFECT		
	AR5 CVD Rate	AR5 AD Rate	AR5 Combined CVD + AD Rates	AR6 CVD Rate	AR6 AD Rate	AR6 Combined CVD + AD Rates
Canfor Corporation	6.14%	10.44%	16.58%	11.87%	34.61%	46.48%
West Fraser Mills Ltd.	6.85%	5.04%	11.89%	16.57%	9.48%	26.05%
J.D. Irving, Ltd.	3.88%	7.66% (All Others)	11.54%	14.38% (All Others)	20.07% (All Others)	34.45% (All Others)
Tolko Industries Ltd.	9.61%	7.66% (All Others)	17.27%	14.38% (All Others)	20.07% (All Others)	34.45% (All Others)
All Others	6.74%	7.66%	14.40%	14.38%	20.07%	34.45%

A small, stylized toy house with a white body, a dark green roof, a red chimney, a red door, and three windows. The house is positioned on a light-colored surface. The text "DOMESTIC OPPORTUNITIES" is overlaid in the center of the image.

DOMESTIC OPPORTUNITIES

Canadian Population Forecast (StatsCAN)

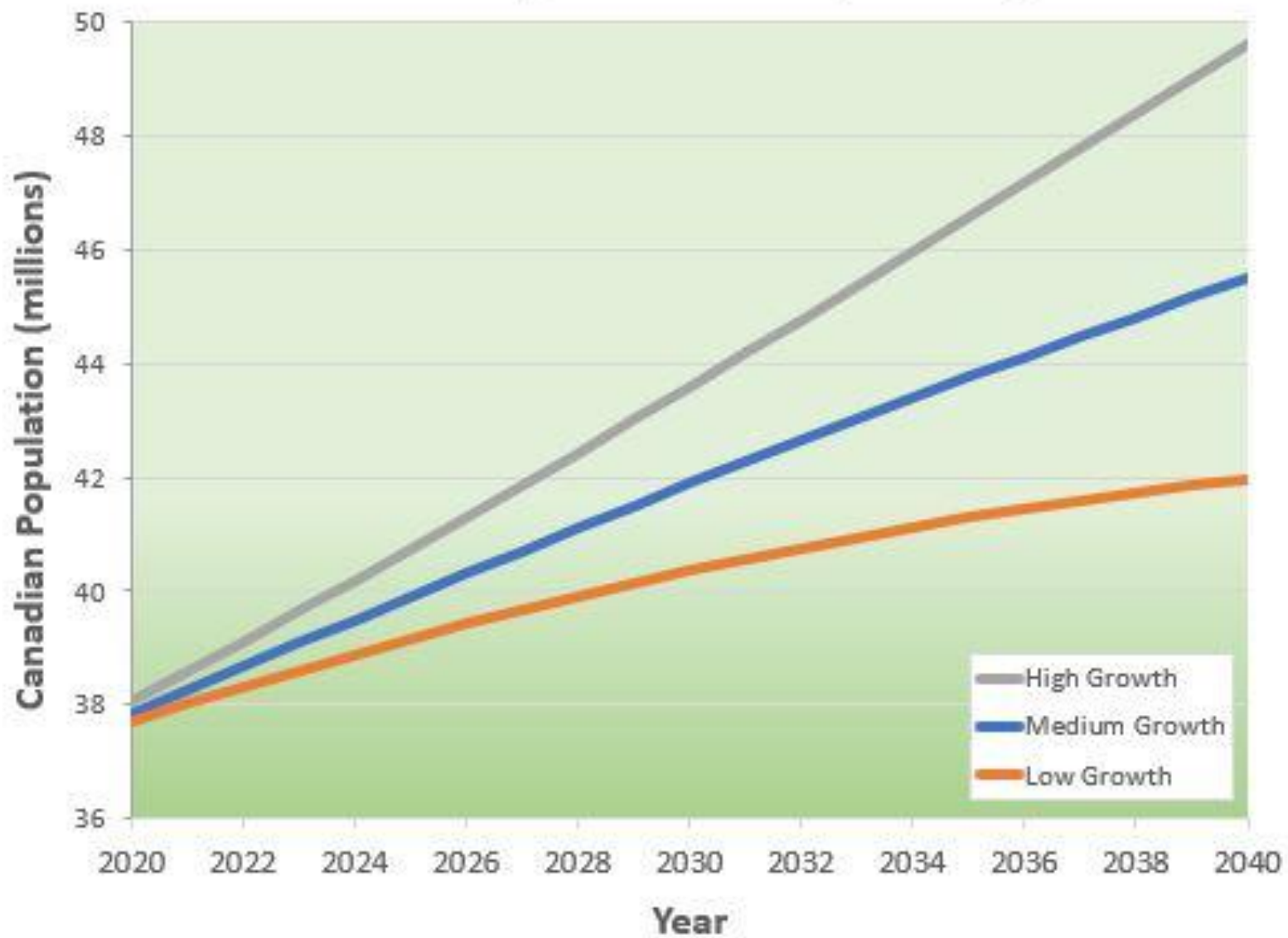


Table 1: Core demographic data

	2023, Housing gap report 2022	2023, Housing gap report 2023	2030, Housing gap report 2022, Baseline	2030, Housing gap report 2023, Baseline	2030, Housing gap report 2023, High-population- growth scenario
Population	38.8m	38.9m	42.8m	43.0m	44.1m
Household	15.5m	15.7m	17.6m	17.7m	18.0m

Source: CMHC calculations based on Oxford Economics, Statistics Canada and CMHC (2022) data.

Table 2: Projected supply

	Estimated housing stock, 2022 (millions)	Projected housing stock in 2030 (2022 report) (millions)	Projected housing stock in 2030 (2023 report) (millions)	Change in projected stock between 2022 and 2023 reports (millions)	Change in projected stock between 2022 and 2023 reports
Ontario	6.03	6.71	6.61	-0.10	-2
Quebec	4.12	4.57	4.45	-0.12	-3
British Columbia	2.26	2.64	2.58	-0.06	-2
Alberta	1.81	2.17	2.09	-0.08	-4
Manitoba	0.58	0.65	0.65	0.00	-1
Saskatchewan	0.52	0.56	0.55	-0.01	-1
Nova Scotia	0.48	0.52	0.51	-0.01	-2
New Brunswick	0.37	0.40	0.39	0.00	-1
Newfoundland & Labrador	0.27	0.28	0.27	0.00	-1
Prince Edward Island	0.08	0.09	0.08	0.00	-4
Canada	16.53	18.58	18.19	-0.39	-2

Source: CMHC calculations. Numbers may not add up because of rounding.

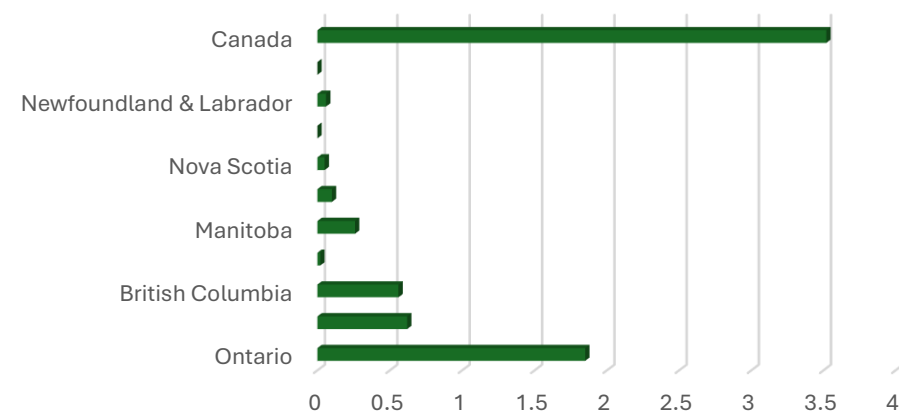
Table 3: Projected supply gaps, 2022 and 2023 reports (in million units)

	Estimate of supply gap in 2030, CMHC (2022)	Baseline scenario estimate of supply gap in 2030, 2023 update
Ontario	1.85	1.48
Quebec	0.62	0.86
British Columbia	0.56	0.61
Alberta	0.02	0.13
Manitoba	0.26	0.17
Saskatchewan	0.10	0.06
Nova Scotia	0.05	0.07
New Brunswick	-	-
Newfoundland & Labrador	0.06	0.06
Prince Edward Island	-	-
Canada	3.52	3.45

Source: CMHC calculations.

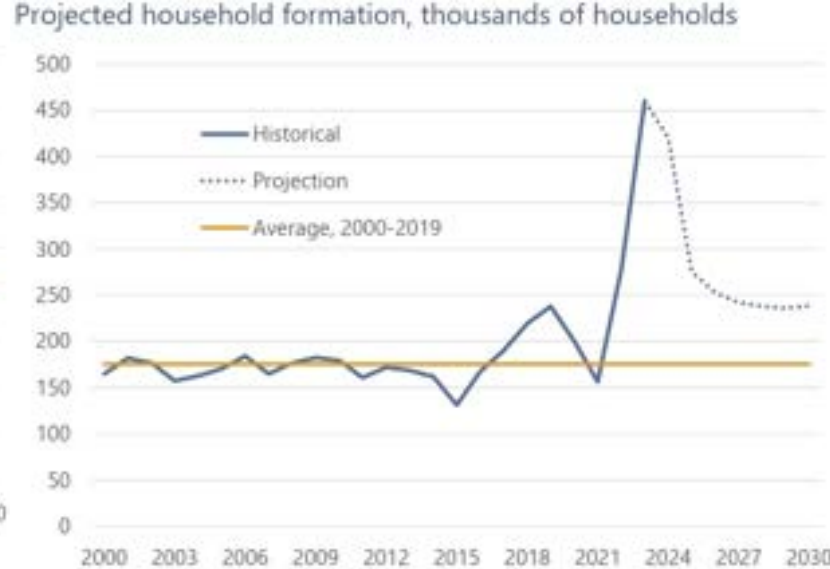
Note: There is no supply gap in New Brunswick or Prince Edward Island under this methodology. Numbers may not add up because of rounding.

Estimate of Supply Gap in 2030 (in million units)





Source:
Statistics Canada and Office of the Parliamentary Budget Officer.



Source:
Statistics Canada and Office of the Parliamentary Budget Officer.

Note:
The projection period covers 2024 to 2030. Estimates in 2022 and 2023, as well as projections over 2024 to 2030, reflect only the demographic demand for housing.



Source:
Office of the Parliamentary Budget Officer.

Note:
The projection period covers 2024 to 2030.

Baseline net housing completions and estimated housing gap

	Number of housing units
Excess demographic demand	385,000
Suppressed household formation	631,000
Return to average vacancy rate	250,000
Housing gap in 2030	1,266,000
Baseline net completions, 2024-2030	1,785,000
Total net housing completions, baseline and housing gap, 2024-2030	3,051,000

Source:
Office of the Parliamentary Budget Officer.

In its [September 2023 update](#), CMHC estimated a housing supply gap in Canada of 3.5 million units. CMHC's housing gap represents the additional units that would be required to restore housing affordability to levels "last seen around 2004" by 2030.

CMHC's estimated housing gap in 2030 of 3.5 million units is almost three times larger than PBO's estimate of 1.3 million units. This difference presumably reflects returning housing affordability to the highly favourable conditions targeted under CMHC's approach.

Similar to PBO's approach, CMHC's housing gap is in addition to housing units constructed under a baseline projection. Under its baseline, CMHC projected that 1.7 million units would be completed (on a net basis) over 2023 to 2030, which is equivalent to 208,000 net housing completions per year on average. This pace of housing construction is well below PBO's baseline of 255,000 units per year assumed over 2024 to 2030.



Future Mid-Rise



Dartmouth Crossing Hotel



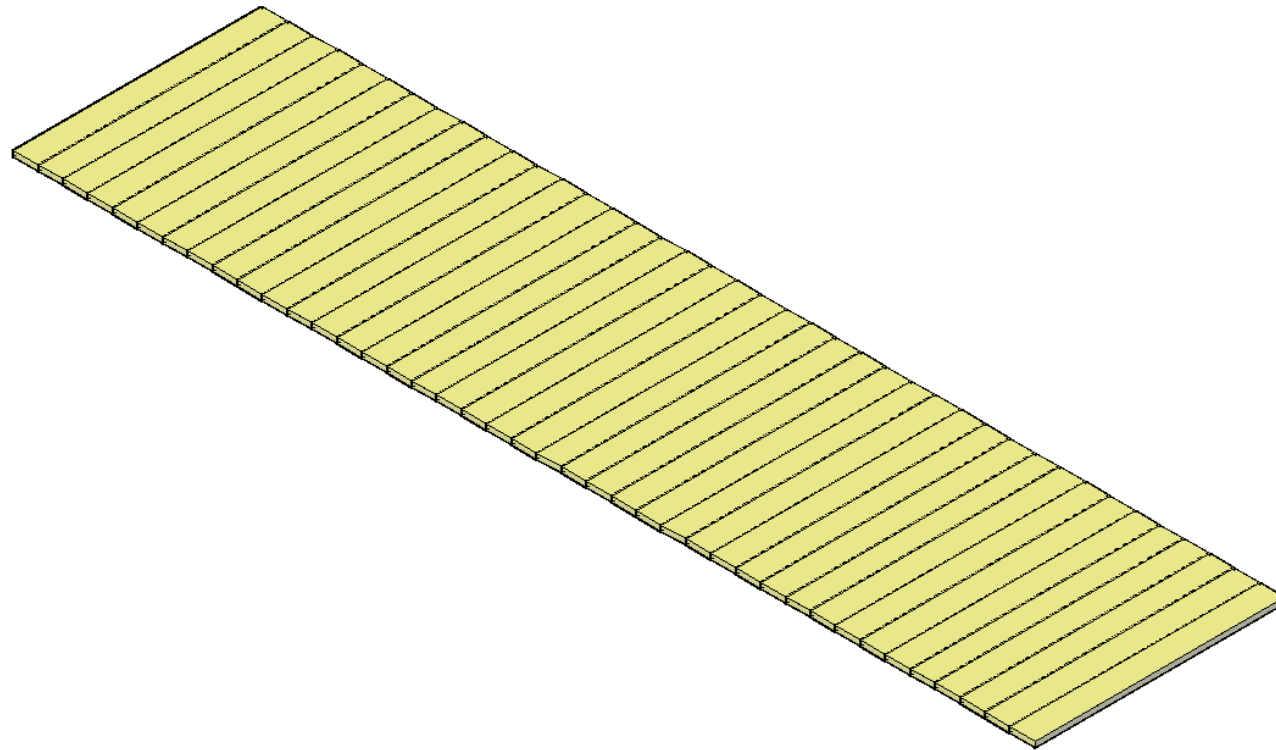
Mass Timber Products

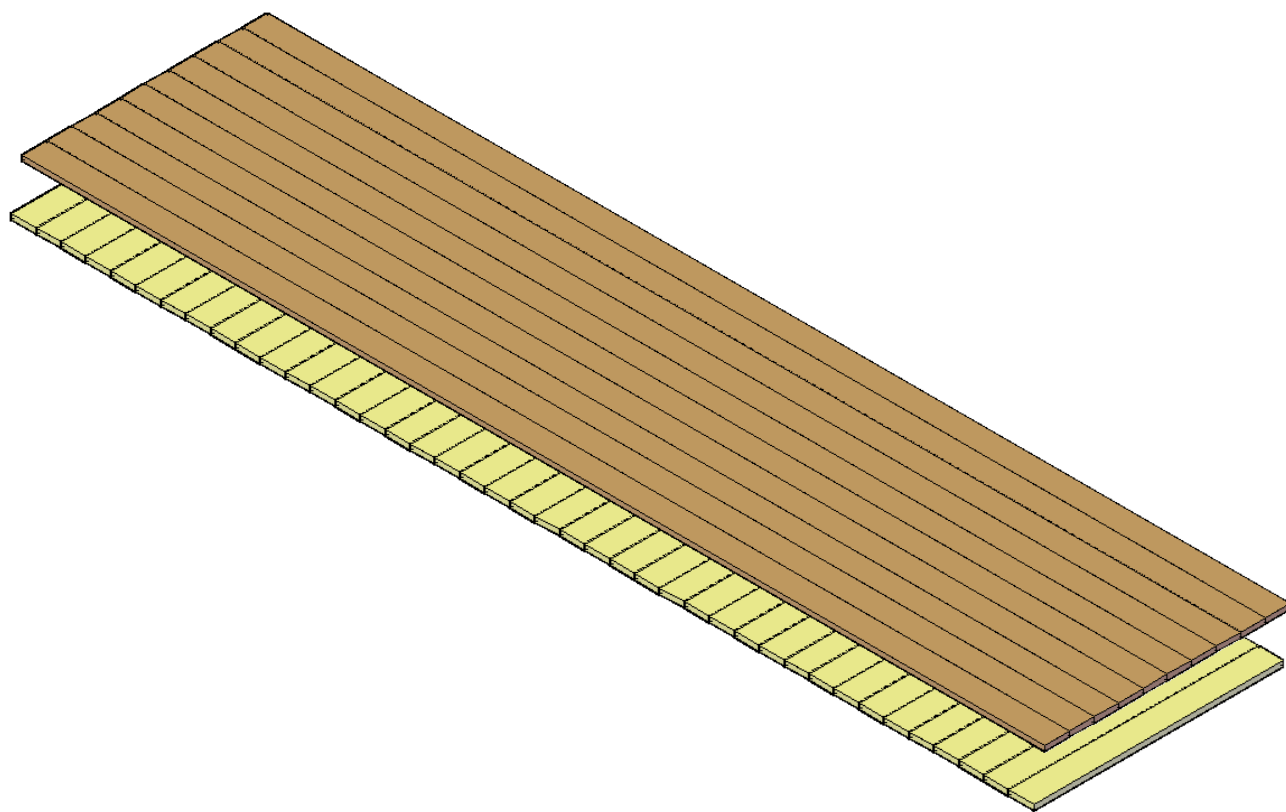


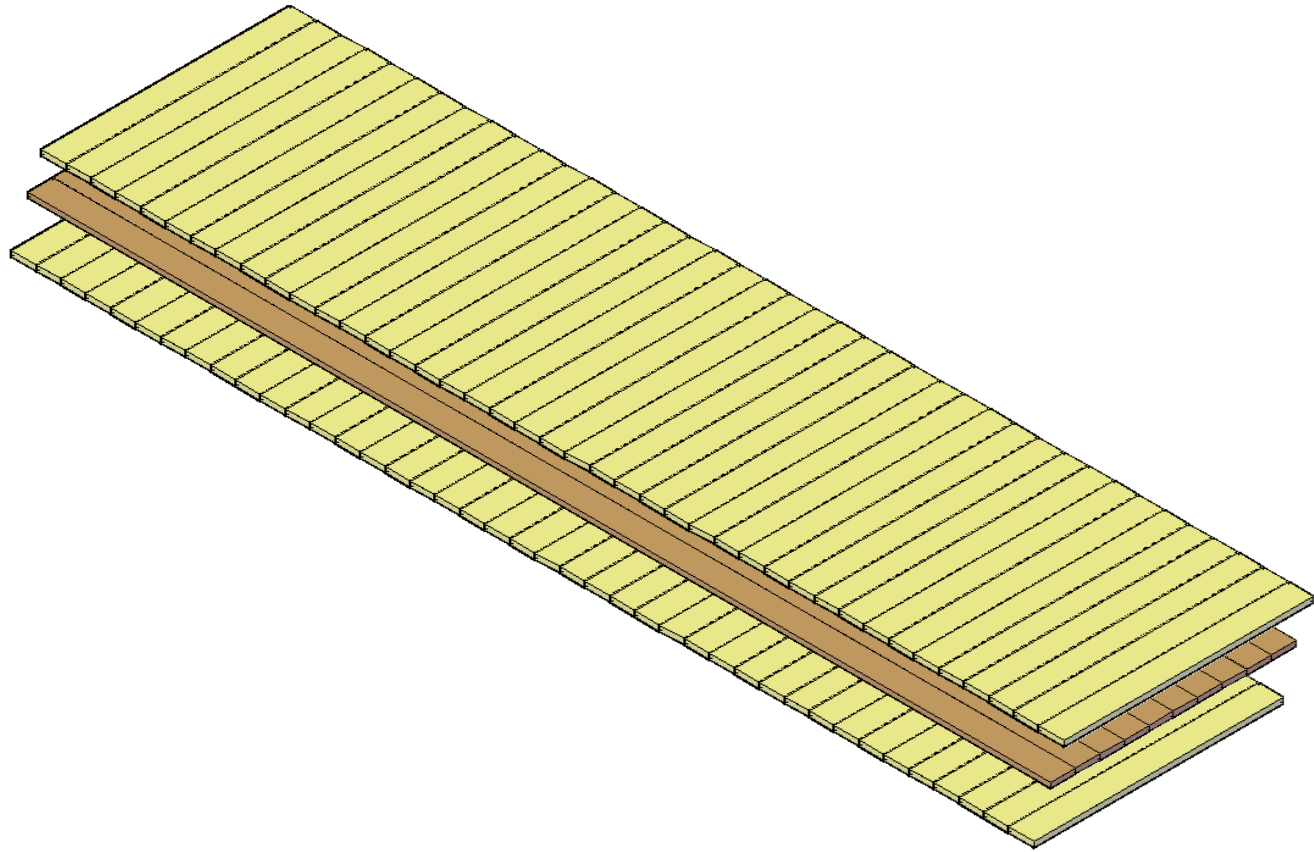
Cross Laminated Timber (CLT)

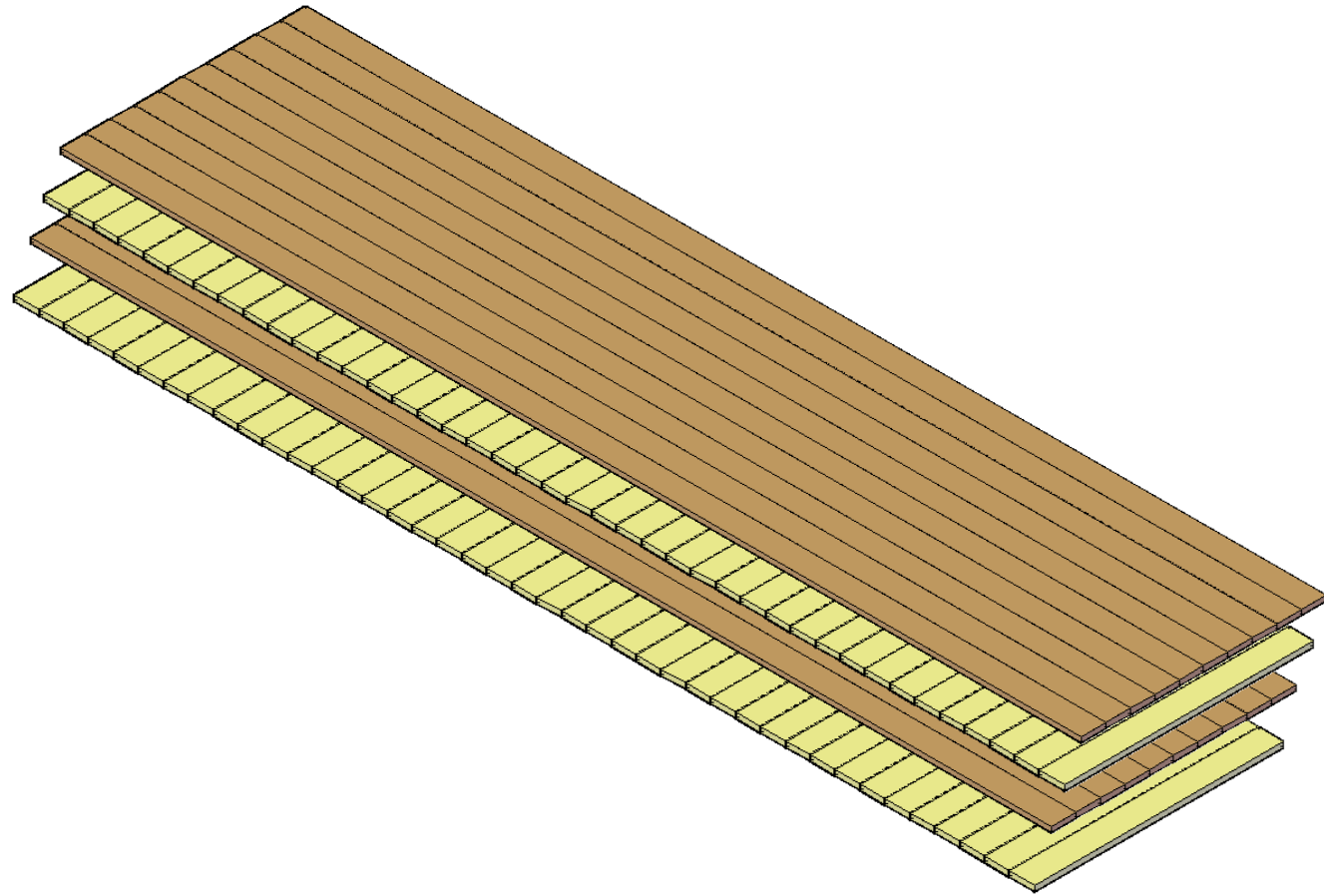
- Product developed in Europe
- Lightweight & prefabricated systems
- Wood strips stacked crosswise on top of each other (glued or nailed)
- Creates thick and large panels
- Thicknesses of the panels vary from 50 to 600 mm
- Cross lamination minimizes swelling and shrinkage in the board plane
- Increases considerably the load-bearing capacity
- Two way action such as concrete slab – *ability to span width and lengthwise.*

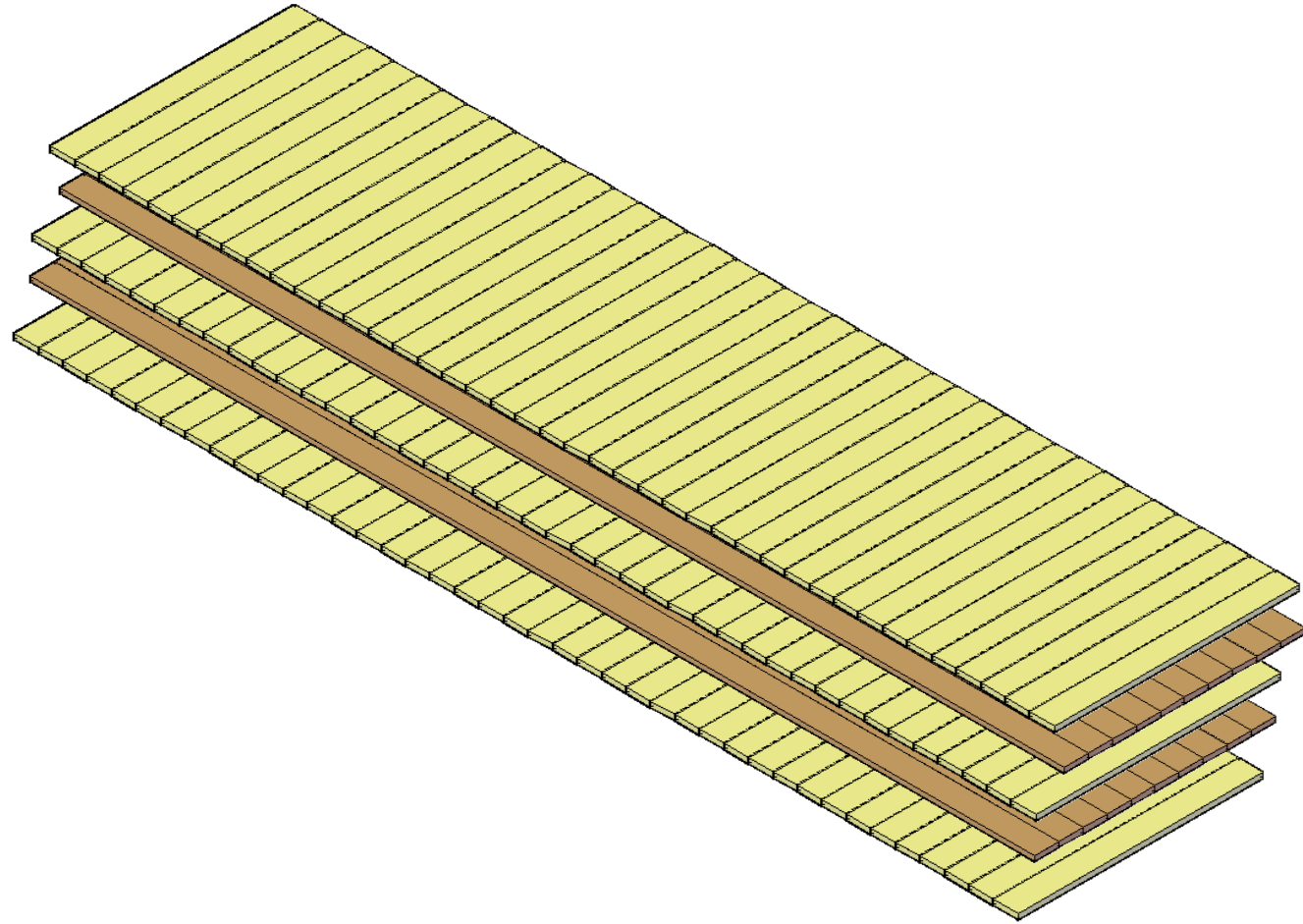














Glue-Laminated Timber

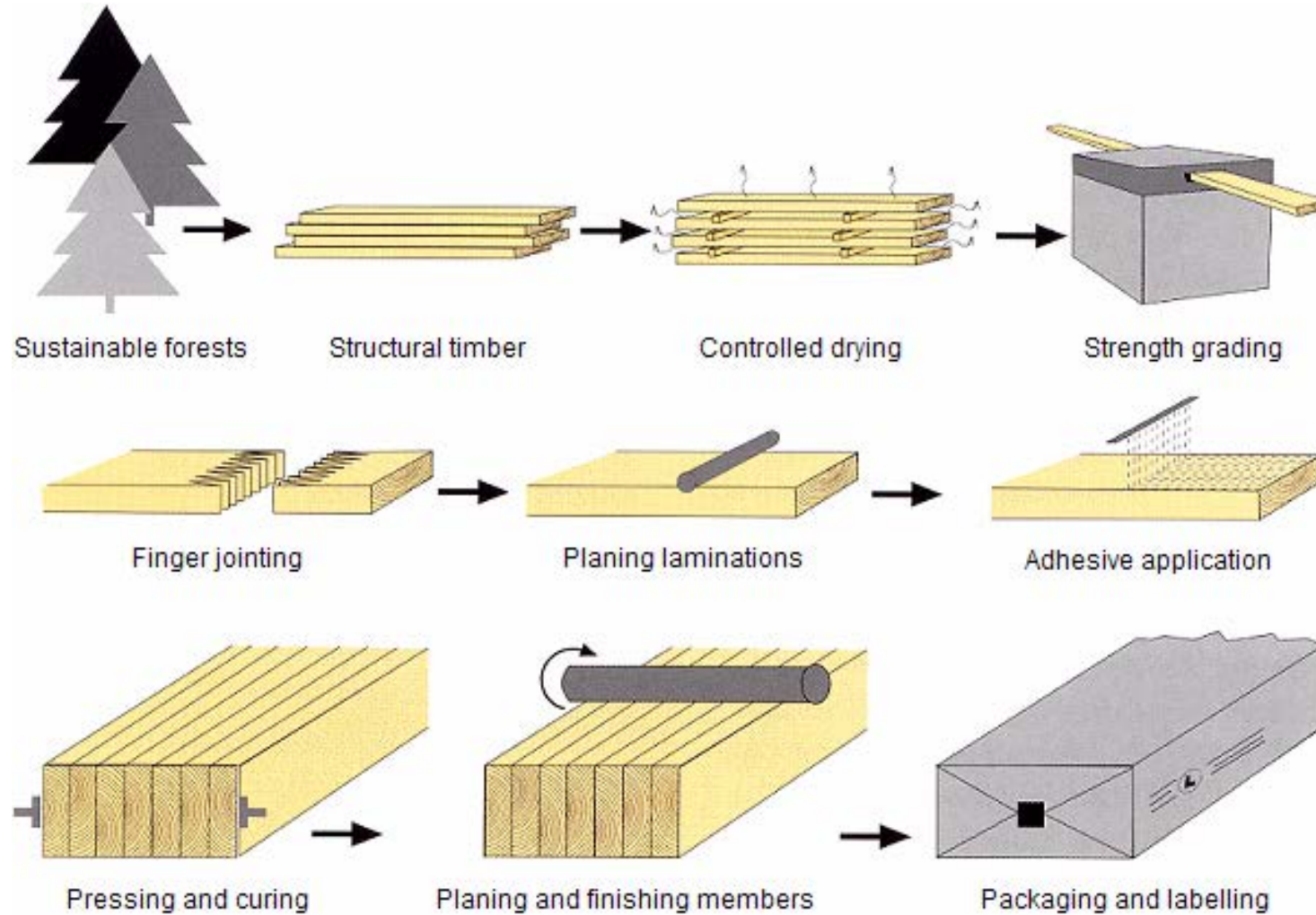






Photo: Greg Hanlon



Decarbonizing Industrial Buildings

Activities to help grow this sector

- Design Solutions for Warehouse/Industrial structures
- Compliance document
- Cost Comparison
- Topics at seminars



ONTARIO

SHOPPERS DRUG MART FLAGSHIP STORE

Toronto, ON
Owner: H&R REIT/Loblaw Companies Ltd.
Architect: Brook McIlroy Inc.
Retail Architect: Petroff Partnership Architects
Heritage Architect: ERA Architects Inc.
Structural Engineer: Blackwell Structural Engineers
General Contractor: JMC Building Developments
Photography: Scott Norsworthy



ALBERTA

PETERS' DRIVE-IN COMMERCIAL DEVELOPMENT

Edmonton, AB
Architect: Berry Architecture + Associates
Structural Engineer: LEX3 Engineering
General Contractor: Premier Building Solutions
Photography: Berry Architecture + Associates



QUEBEC

TANGUAY

Trois-Rivières, QC

Owner: Groupe AMT (Groupe Immobilier Tanguay)

Architect: Coarchitecture

Structural Engineer: Les Consultants S.M. Inc.

Wood Supplier: Nordic Structures

Photography: Stéphane Groleau





LOCATION

Vancouver, BC

TENANT

[MEC](#)

TIMBER FABRICATOR

[Structurlam Mass Timber Corporation](#)

SIZE

5,730 square metres

ARCHITECT

[Proscenium Architecture + Interiors](#)

PROJECT MATERIALS

Cross-laminated timber (CLT)

Glue-laminated timber (Glulam)

COMPLETION

2021

STRUCTURAL ENGINEER

[Fast+Epp](#)

STRUCTURAL SYSTEMS

Hybrid / Wood

Low rise

Mass timber

Panellized

Post + beam

Prefabricated

OWNER

[Beedie Group](#)

CONTRACTOR

[Heatherbrae Builders](#)

Education Buildings

Activities to help grow this sector

- Work with the Provinces and institutions
- Focus on Hybrid structures and solutions
- Building Tours
- Build off our current successes







MISS VICKY'S CLASS



EXIT
EXIT ONLY



WELCOME



THE
CALENDAR
BOX



Studies of Health and Wellness

Recent studies have shown that wooden interior materials can positively affect human health and wellness. School interiors that create a connection to nature through views and the use of natural materials can have positive psychological impacts.

- A 2010 study by the University of British Columbia found that being surrounded by wood and plants reduced their participants' stress.⁷
- A study commissioned by Forest and Wood Products in Australia linked the connection to nature, biophilic design and using natural materials like wood with improved physical and mental well-being. The study found that those who worked in spaces with the presence of wood overall had higher satisfaction at work, lower absenteeism, higher levels of concentration and improved productivity.⁸

Benefits of School Design

Studies have found that:

- Office design: productivity can be increased by 8%, and rates of well-being can be increased by 13%.
- Education spaces: increased learning rates, improved test results, concentration levels and attendance, reduced impacts of ADHD.⁹

7 Augustin, "Wood as a Restorative Material in Healthcare Environments."

8 Knox and Parry-Husbands, "Workplaces: Wellness+Wood=Productivity."

9 Knox and Parry-Husbands.



Student Stress Reduction

- The average reduction in student stress from the beginning to the end of class was much higher in the biophilic classroom when compared to the control classroom.

Learning Outcomes

- Improvement in average Math test scores over seven months was more than three times higher in the biophilic classroom compared to a control classroom.
- After seven months in the biophilic classroom, 7.2% more students tested at grade level than control classroom students.

Average change in HRV scores per month



iReady Test Score Averages



Offices

Activities to help grow this sector

- Local building tours
- Lowrise, midrise, and tallwood office spaces
- Economic benefits for developers
- Biophilic benefits for architectural design



Fully Encapsulated



Partially Encapsulated



Fully Unencapsulated







THE ROGER BACON BRIDGE

Nappan, Nova Scotia



Timber Service Life

Naturally durable material

Can withstand short-term overloading

Not damaged by repeated freeze-thaw cycles

Not damaged by deicing chemicals (causes corrosions in steel and concrete)

Resistant to fatigue damage

Large timber members have fire resistance properties

A well-designed and properly maintained timber bridge can have a service life of 75-100+ years.

Many examples exist of 200+ year old timber bridges

Vaughn Creek Covered Bridge



TEMISCAMIE RIVER BRIDGE

CHIBOUGAMAU, QUÉBEC

North of Lakes Albanel and Mistassini, the Temiscamie River timber bridge features a straight section supported on arched beams spanning 30 m. The roadbed, at 34 m overall length, is comprised of treated hemlock timbers sitting on a concrete foundation that takes over the lateral thrust of the arches.

OWNER

Chantiers Chibougamau

STRUCTURE

Michel St-Germain

SPAN

32.0 m

LOAD

custom truck, CF3E-140t

COMPLETION

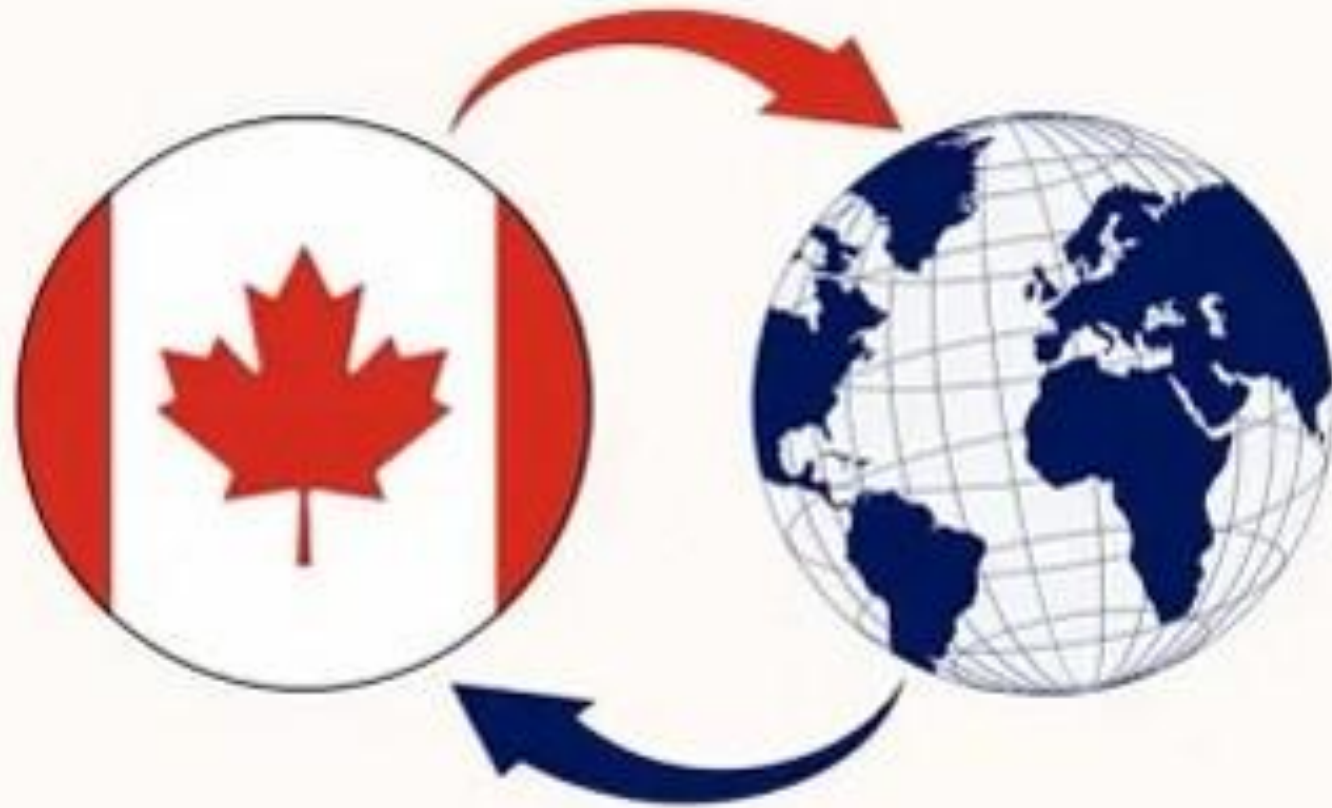
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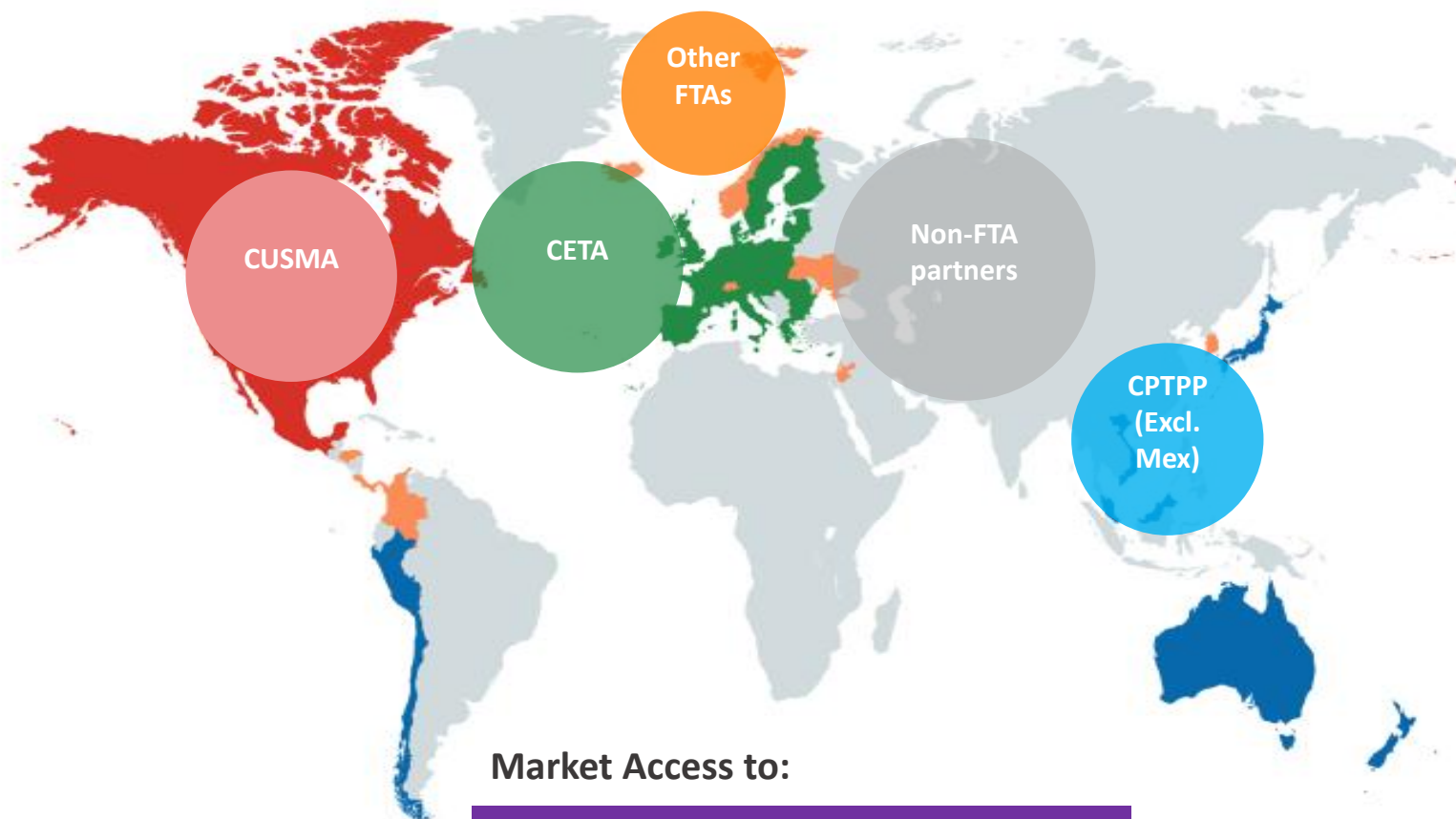


International Opportunities



... EXCELLENT GLOBAL MARKET ACCESS FOR BUSINESSES...

- Through 14 free trade agreements, Canada has preferred market access to 51 foreign countries



Market Access to:

1.5 billion consumers

Over US\$ 52 trillion or nearly 62% of global GDP

is a Top 10 Global Exporter of these Forest Products:



... FACILITATED BY EFFICIENT TRANSPORT LINKAGES TYING NORTH AMERICA TO ASIA AND EUROPE.



Strategic Access

Canada's Gateways offer an integrated and efficient transport network that spans from coast to coast, reaching deep into North America's economic heartland. The Gateways' strategic locations offer the most direct routes to and from Asia and Europe.

Up to two days shorter

Sailing times from Canada's Atlantic and Pacific deep-water ports are up to two days shorter than from other North American ports.



ELBOWS UP