



WOODLANDS
SINCE 1882

Competing from Atlantic Canada

Canadian Woodlands Forum
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Woodlands
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About us.

- **Foundation of our forest supply chain**
- **2.4M hectares under management**
1.1M - NB Crown License 6 & 7
1.3M – Freehold [NB, NS, Maine]
- **2,000-person workforce**
(direct/indirect)
- **Activities span all aspects of forest harvest & renewal.**
- **100% of lands 3rd party certified**
- **1.1 Billion trees planted since 1957**

Products



Lumber



Growing Media



Corrugated



Freehold Land



Tissue



Pulp



Pellets



Crown License 7



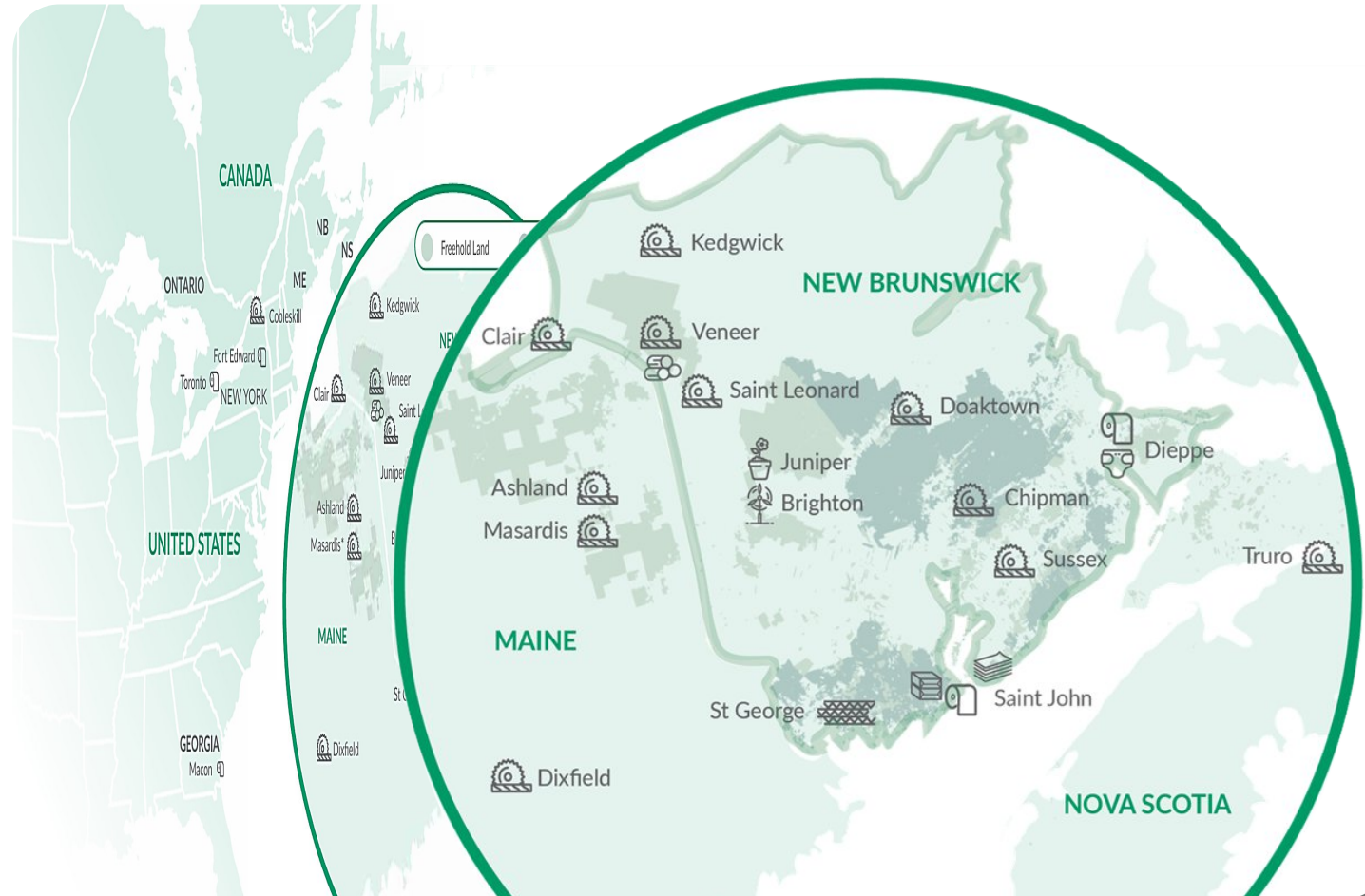
Diapers



Paper

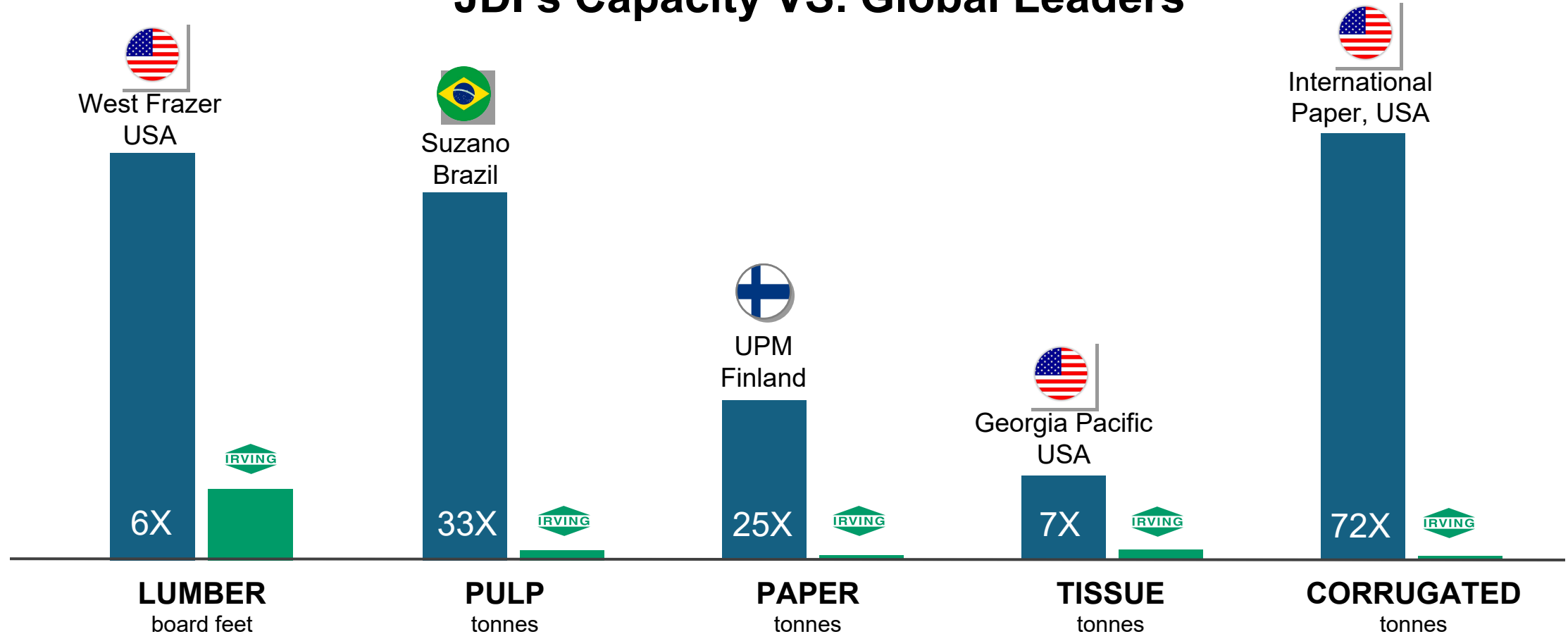


Wind Farm



JDI is BIG in Atlantic Canada, but we are small on a global level – so, we need to be very good to compete.

JDI's Capacity VS. Global Leaders



Canada's forest sector is not what it once was... and not because of a lack of forest.

Canadian wood supply should be increasing.

- Forest area in Canada has **increased** since 2014
- Wood volume has **increased by 5%** since 1990

But instead...

- National AAC has **declined by 16%**
- **Only 60%** of the total national AAC was harvested in 2022, indicating **policy/economic constraints**

An opportunity lost.

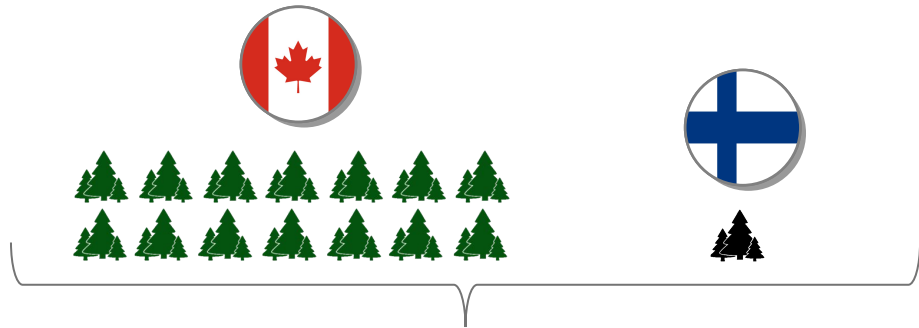
- Canada's harvest volume is at **50% of the potential**
- 130,000,000 m³ of lost opportunity
- @\$177 per m³ GDP - **\$23 Billion opportunity per year**



Canada's Forest Product Sector between 2004 and 2024

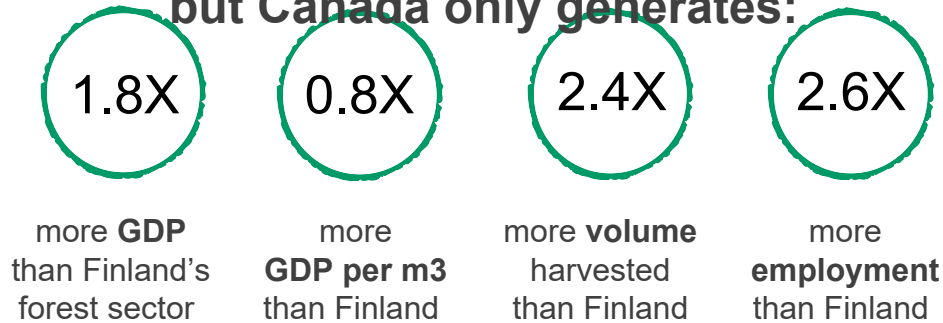


Finland is an example of what's possible when a society makes forestry a true priority sector










Canada has **14X's MORE FOREST** than Finland,

but Canada only generates:



**ALL THINGS BEING EQUAL,
CANADA'S METRICS SHOULD BE 14X**

		
	5% planted	88% planted
	42% 3 rd party certified	96% 3 rd party certified
	11% private land ownership	60% private land ownership
	9% protected areas	13% protected areas
	lost 3.5M tons of pulp capacity since 2010	added 4M tons of pulp capacity (Nordic countries)

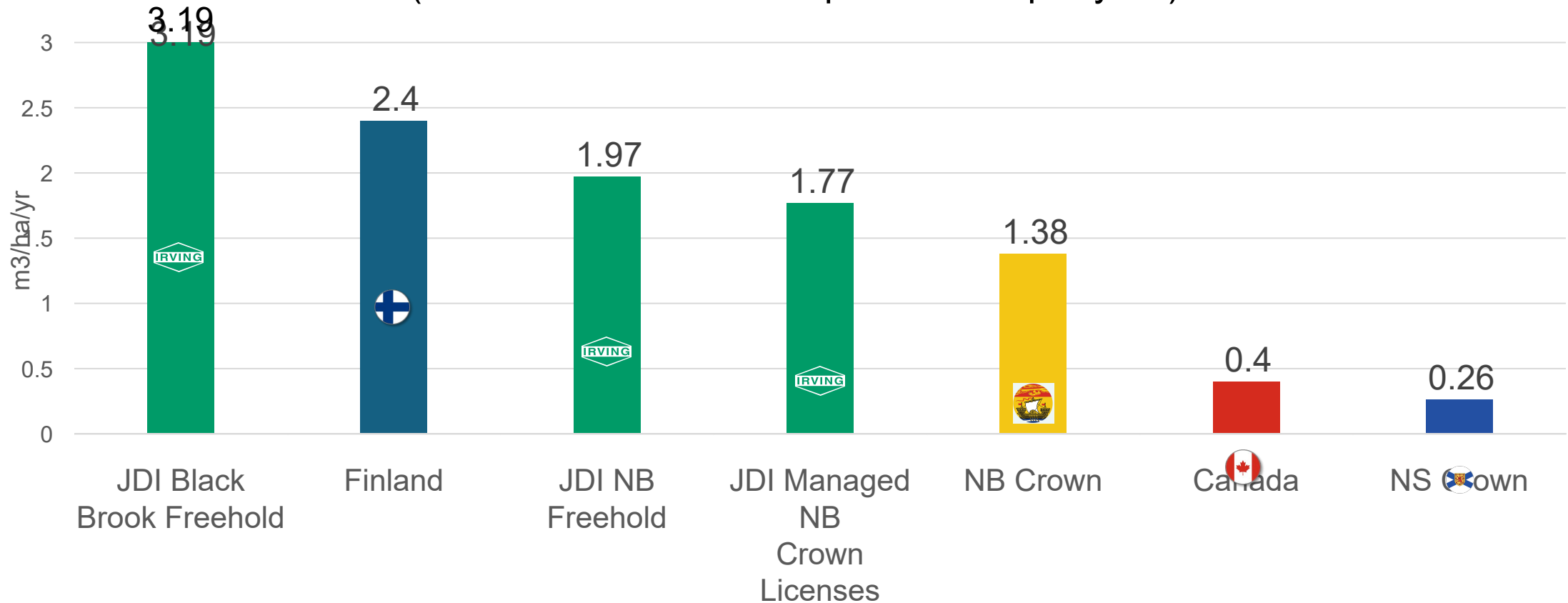
We can do this here too! Forest product investments can be made, **BUT** it requires **secure fibre availability + competitive fibre costs.**



*Making an investment means having
‘confidence in the future’.*

Yield is a function of leadership focus and investment

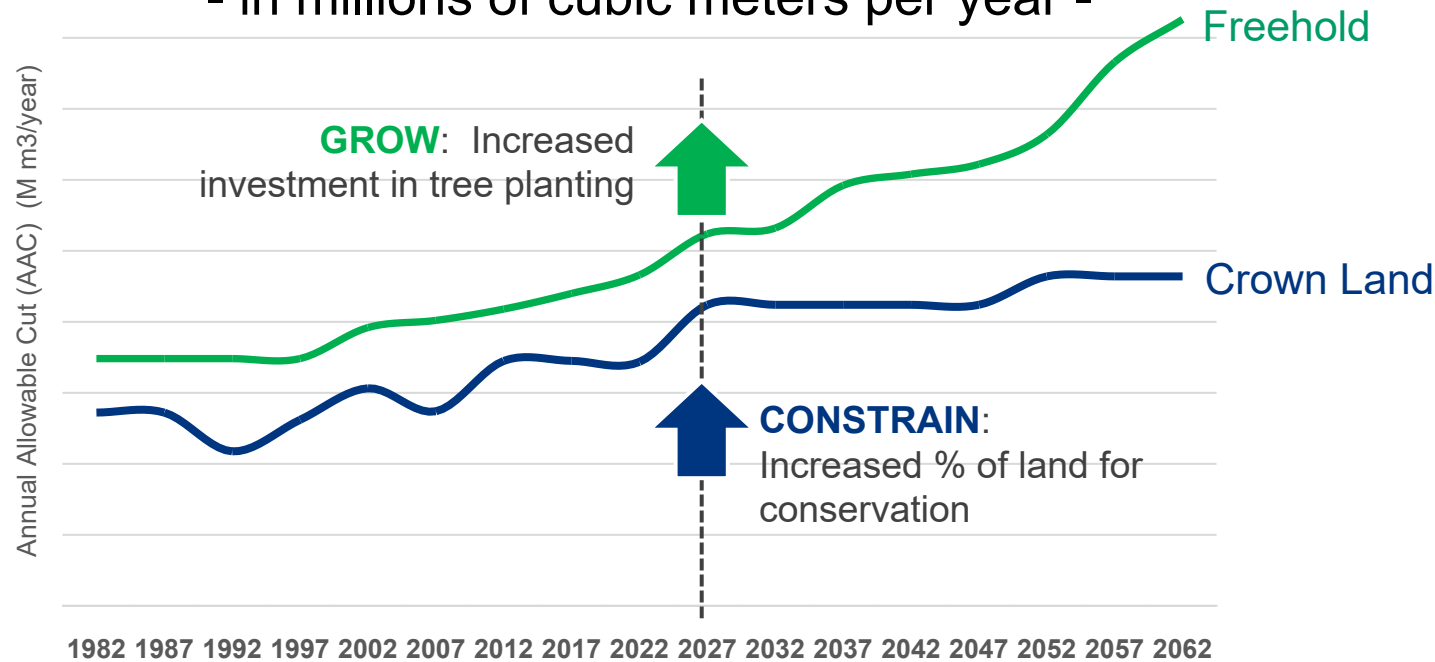
Spruce/Pine/Fir Production (harvest in cubic meters per hectare per year)



Increasing fiber availability and quality is possible - it's about management choices and government policy.

JDI Managed Lands Annual Allowable Cut Levels

- in millions of cubic meters per year -



From 1982 to 2027:

- 63% increase in JDI managed Crown Land AAC
- **78% increase** in JDI Freehold AAC

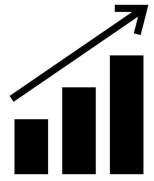
In 2002, JDI set a **goal to double** its freehold softwood AAC by 2050.

- **We expect to achieve that goal by 2037.**



PROJECT NEXT GEN

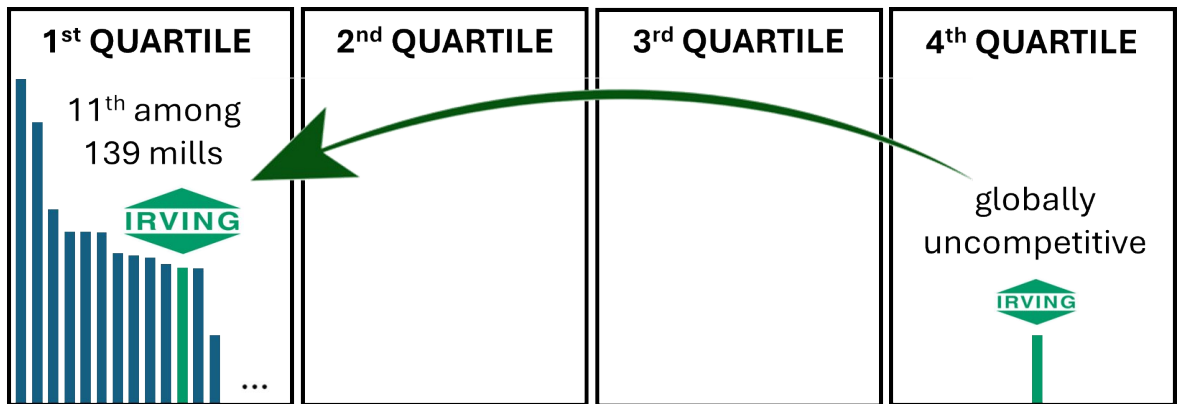
A generational investment in Canada's Forest Product Industry



Currently underway at **Irving Pulp & Paper** in Saint John, NB.

The **\$1.5B project** will increase the mill's capacity from **1,000 to 2,000 tonnes/day**.

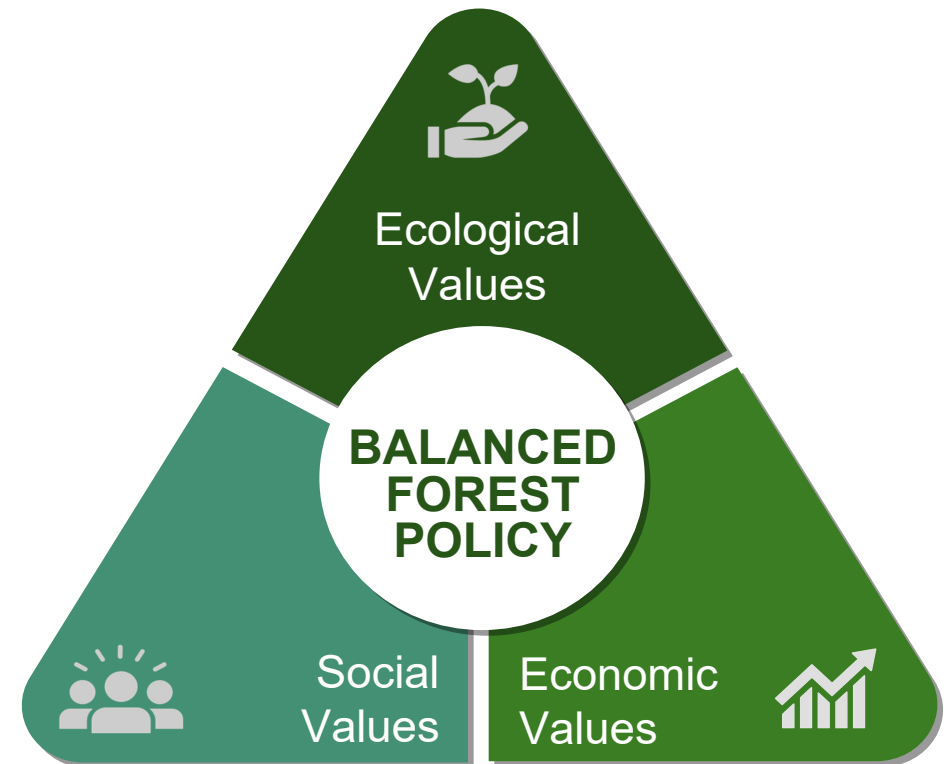
Moving it from **4th quartile to 1st quartile**, placing it among the top producing kraft pulp mills in the world.



The best path forward is found in balance – one that sustains the environment, the economy, and community values.

Opportunity still exists to make the region more competitive

- Today, there is **no economic objectives for Crown Land** – it's not seen as an asset
- Wood supply is a residual output of meeting ecological constraints
- In other words, there are objectives for everything ecological (water, soil, forestry type and age, habitat) but nothing for timber economics, nor the social needs of individual communities.
- **Balance is key.**



CASE STUDY: New Brunswick's Shared Landscape Initiative

Irving Woodlands proposal for balanced policy and... the response.

ECOLOGICAL

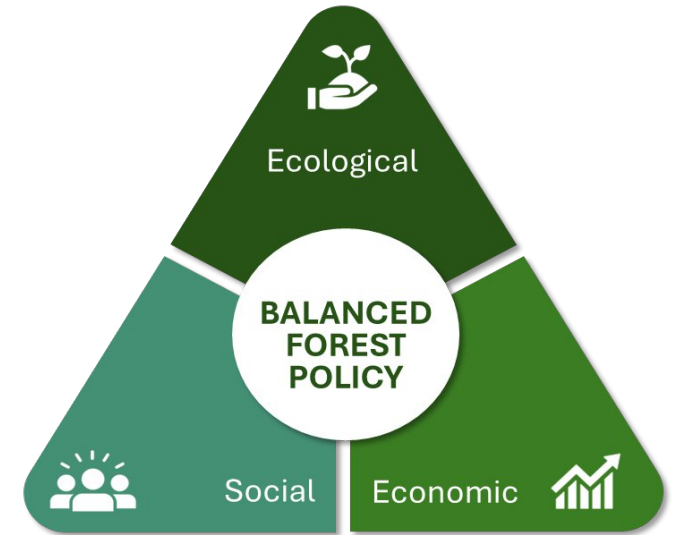
- **Exceeded** DNR conservation target by **1.3X**
- **Added** a net increase of **46,000 hectares** into conservation
- **Added** protection and connectivity for wetlands & water
- **Exceeded** DNR target for old forest conservation by **1.8X**

SOCIAL

- **Added** protected areas around non-forestry communities for: tourism corridors, drinking water supply, low impact forestry...
- **Reduced** logging trucks on public roads



- **Adjusted** the location of some conservation and working areas
- **Returned** 32,000 hectares near forest-dependent communities
- **Improved** the sector's cost competitiveness (via increased piece size, more saw material, reduced freight distances)
- **Sustained** good jobs in forest-dependent rural communities



Conclusion: Canada's forestry industry once led the world – we've lost this leadership position, but we can reclaim it. And our region can lead the way.

1. We should be proud of our work.

Our forestry sector is doing a great job and has the skills to outperform other jurisdictions – we should be proud of our heritage and our skills.


2. We need to focus on the fundamentals.

By improving fiber availability and reducing fiber cost, the competitiveness of the forestry sector will improve, attracting more investment and growth for all.

3. We need our federal & provincial governments to

champion the industry again.

Our forestry resource is one of Canada's natural



**We have
the skill -
if politicians
have the
will!**



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Thank you.