



Backgrounder: *Canada's Commercial Forest Tenures*

EDMONTON, April 5, 2004 - Much of Canada's logging activity occurs on Crown (often referred to as "public") land and is regulated by various provincial commercial forest tenure systems that allocate cutting rights to and infer obligations on recipients of the tenures. It is these tenure systems on Crown forest land that are the focus of this Global Forest Watch Canada product.

Forty-five percent (45 percent -- 417.6 million ha) of Canada's land area is forested. Seventy-one percent (71 percent) of the forested land is owned by provincial governments, 23 percent by federal and territorial governments, and 6 percent is privately owned. Fifty-six percent (56 percent -- 234.5 million ha) of Canada's forests are considered to be commercial forests, i.e., they are capable of producing forest products; and 28 percent (119 million ha) are managed for timber purposes. Annually, Canada harvests an estimated less than 0.5 percent (1,025,429 ha, or 193.2 million m³, in 1999) of the commercial forest area. Most of this wood comes from provincial commercial forest tenures.

British Columbia logs the largest volume of timber, and has the second largest area cut. Québec logs the second largest volume of timber, and has the largest area cut. Ontario places third for both volume and area cut. These three provinces comprise 70 percent of the volume logged and 79 percent of the area cut on public forestland for all of Canada.

The general operating areas of the tenure areas of the major forest companies total approximately 228 M hectares, or approximately 40 percent of the total area of Canada's provinces (Map1). The Montane Cordillera, Pacific Maritime, Atlantic Maritime and Boreal Plains Ecozones have the greatest proportion of their areas within forest companies' tenured operating areas.

The top ten companies – based on Annual Allowable Cut allocations -- are, in declining order:

- | | |
|-------------------------|-----------------------|
| 1. Weyerhaeuser | 6. Tembec |
| 2. Abitibi-Consolidated | 7. Tolko |
| 3. Canfor/Slocan | 8. West Fraser |
| 4. Bowater | 9. Doman |
| 5. Domtar | 10. Louisiana-Pacific |

The top five of the above companies operate mainly in British Columbia, Québec and Ontario.

The top ten companies – based in terms of the size of their general operating areas – are, in declining order:

- | | |
|-------------------------|----------------------------------|
| 1. Tembec | 6. Weyerhaeuser |
| 2. Abitibi-Consolidated | 7. Tolko |
| 3. Canfor/Slocan | 8. Bowater |
| 4. West Fraser | 9. International Forest Products |
| 5. Louisiana Pacific | 10. Riverside. |

The top five of the above companies operate mainly in British Columbia, Québec, Ontario and Manitoba.

In 2000, the thirteen largest companies in declining order of tenured operating area were: Slocan, Tembec , Weyerhaeuser , Tolko, Abitibi-Consolidated, Domtar, Donahue Inc., Canfor, Daisahwa, Joint Venture Parties (ALPAC), West Fraser, Bowater and Kruger.

In 2003, the thirteen largest companies in declining order of tenured operating area are: Tembec, Abitibi-Consolidated, Canfor/Slocan, West Fraser, Louisiana Pacific, Weyerhaeuser, Tolko, Bowater, International Forest Products, Riverside, Domtar, Weldwood, and Joint Venture Parties (ALPAC).

The operating area of the top thirteen companies in 2003 is approximately 164 M ha. In 2000, the top 13 companies held the equivalent of 151 M hectares. This compares, in 2003, to the top 13 companies holding 57 percent of the operating area in the commercial forest zone, an increase of 9 percent in the 2000 to 2003 period.

British Columbia, Ontario, New Brunswick and Alberta are the provinces that have the greatest proportion of their provincial Crown land areas within forest companies' tenured operating areas.

The top two companies (based on AAC allocations, in declining order) for each province are as follows:

- British Columbia: Canfor/Slocan, Weyerhaeuser
- Alberta: Weyerhaeuser, Joint Venture Parties (Alberta Pacific)
- Saskatchewan: Weyerhaeuser, Mistik Management
- Manitoba: Tolko, Louisiana Pacific
- Ontario: Abitibi, Domtar
- Québec: Abitibi, Domtar
- New Brunswick: Irving, U.P.M. Kymmene Miramichi Inc.
- Newfoundland: Corner Brook, Abitibi

The information in this report and in the accompanying datasets was gathered in order to continue to develop an understanding of how much of Canada's forest area is under commercial forest tenures, where these tenures (including the operating areas of major forest companies) are located, and who is most likely to control them. This information and these datasets are important because of the extent of tenures and the resulting logging activity over vast areas of Canada's Crown forestland.

A data gathering effort of this size on an activity of private commerce (albeit generated mostly from Crown [i.e., public] timber resources) so widely dispersed in ownership, tenure situation and geography is impossible to accomplish error-free. Global Forest Watch Canada invites readers to submit corrections.

In 2000, Global Forest Watch Canada published a first look at the distribution of tenures in Canada, based on a data set initially developed by World Wildlife Fund Canada and then updated and refined by Global Forest Watch (see: Smith W. and P. Lee, eds. "Canada's Forests at a Crossroads: An Assessment in the Year 2000." Available at: www.globalforestwatch.ca). The data set is available from the Global Forest Watch Data Warehouse at www.globalforestwatch.ca. This new report and associated data sets provides an update of the 2000 data and analysis; it also contains more detailed information than the original data set, including a series of spatial data sets and maps and databases. It is these spatial data sets and databases that are the main products resulting from this project.

Canada's Commercial Forest Tenures, including maps, figures, and satellite pictures, as well as media briefing materials, is available for download at: [**www.globalforestwatch.ca**](http://www.globalforestwatch.ca)

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