

The Current Environment

- **Forest Sector Transformation**
 - Supported by Bio-Pathways technical analysis
 - Strong R&D (FPInnovations, NSERC)
- **Government Policies**
 - Pan-Canadian Framework on Clean Growth and Climate Change
 - Forest Bioeconomy Framework for Canada
- **Government Programs**
 - Investment in Forest Industry Transformation
 - Clean Growth Program

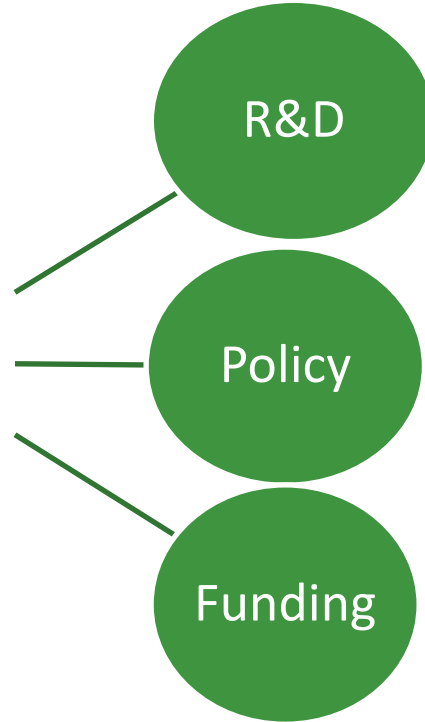
Key Drivers & Variables

- Healthy and sustainable forests
- Social responsibilities
- Trade disputes on traditional products
- Market diversification – products & destinations

“Healthy Forest”



Sustainable, stable and economic access to fiber



- Equipment (harvesting)
- Silviculture techniques
- Risk mitigation (pests, fires)
- Bio-products

- SARA (multi-species, Caribou)
- Climate Change
- Forest Management Plans (Provincial)

- Restoration programs
- IFIT/SDTC
- New funding program like PPGTP

Transitioning to Low Carbon Economy

Continued investment and policies that addresses all facets of the innovation spectrum

Research and
Development



De-risk
Commercialization



Deployment of
Clean Tech



Market Access

Expanding to new value chains