Light House

Market Research on Small and Medium-sized Enterprises (SMEs) involved in Recovery and Reintegration of Construction Renovation & Demolition Wood

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Executive Summary

Construction activity has a significant environmental footprint, accounting for approximately 30 percent of raw material use and waste generation globally. In Canada, the construction, renovation, and demolition (CRD) sector plays a central economic role, contributing an estimated $141 billion to national GDP in 2020, while in the process generating substantial material waste. Among CRD materials, wood represents one of the largest and most promising opportunities for waste reduction, greenhouse gas (GHG) mitigation, and circular economic development. In addition, improved CRD material circularity has the potential to advance regional self-sufficiency, reduce supply-chain bottlenecks and material price volatility.

This study builds on foundational work led by Environment and Climate Change Canada (ECCC) between 2022 and 2026, which identified CRD wood as a high potential material for recovery and reintegration into the economy. That work included national material flow mapping, stakeholder convenings, and case studies highlighting emerging recovery practices and business models. These efforts demonstrated growing interest in reclaimed wood across Canada, while also identifying the need for deeper market research focused on the small and medium sized enterprises (SMEs) driving recovery, processing, and reuse.

The objective of this study by Light House is to examine the current state of CRD wood recovery and reintegration across Canada; identify SMEs engaged in wood generation, collection, processing, remanufacturing, and enduse; assess existing supply chains and business models; and highlight challenges and opportunities that could be addressed through targeted policy interventions. The analysis focuses on high value reintegration pathways, excluding downcycling applications such as waste to energy and landfill cover.

The identified market includes more than 250 small and medium-sized enterprises (SMEs) actively engaged in reclaimed wood markets across Canada. These organizations operate across multiple sectors, including deconstruction and salvage, waste management, manufacturing, retail, and design. Activity is concentrated in more populous provinces—Ontario, Quebec and British Columbia—but viable recovery and reintegration models are also emerging in other regions. Many SMEs are small operators, often with fewer than 20 employees. Observed business models show that SMEs often span multiple stages of the value chain directly and form partnerships with other companies.

Key findings indicate that while technical solutions for wood reclamation largely exist, market development is constrained by systemic challenges. These include limited visibility into CRD wood flows, inconsistent material quality due to commingling and contamination, insufficient storage and processing infrastructure, fragmented supply chains, and underdeveloped end markets for higher value applications. Traditional demolition practices continue to limit recoverability, while deconstruction—though associated with improved material quality and employment outcomes—faces cost, capacity, and policy barriers. At the same time, demand for wood fibre in low value applications such as bioenergy risks diverting recoverable wood away from its highest value uses.

The study identifies opportunities to strengthen CRD wood recovery in Canada. These include developing regional midstream hubs for sorting and processing, improving standards and grading pathways for reclaimed wood, and supporting SMEs through coordinated market development initiatives. Best practices in some municipalities provide models that could be replicated in other jurisdictions (e.g., deconstruction bylaws, variable tipping fees, penalties/incentives to encourage source separation). Emerging business models, including vertically integrated operations, cooperative approaches, and partnerships between deconstruction firms and value-add manufacturers and retailers, represent pathways for growth when supported by adequate infrastructure and policy alignment.

Success in scaling reclaimed wood markets will depend on coordinated action across several domains. Critical factors include policy intervention, investment, infrastructure, market development, information sharing, research and development, training and skills development and data acquisition and management. Municipal, provincial, and federal governments all have roles to play, particularly through incentives, procurement, codes and standards, phased policy measures and embodied carbon policy frameworks that recognize the value of reclaimed wood.

CRD wood represents a significant, underutilized resource capable of advancing Canada's circular economy, reducing GHG emissions, and supporting economic development. Based on interviews, surveys, and desktop research, the study provides an initial overview of SME activity across Canada and outlines emerging pathways for strengthening wood recovery and reintegration. Next steps include expanding and maintaining an SME database to improve sector visibility and further examining how municipal and regional policy frameworks influence market development and growth.

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1. Background

1. Background

Globally, construction activity has a large environmental footprint, accounting for about 30% of raw material use and waste generation.[1] In Canada, the construction, renovation, and demolition (CRD) sector is a major contributor to the country's economy, estimated to have generated $141 billion GDP in 2020.[2]

A national study commissioned by Environment and Climate Change Canada (ECCC) from 2022–2023 specifically identified wood as a CRD material with high potential for diversion and economic benefit.[3] While traditionally treated as waste, CRD wood is increasingly recognized as a valuable resource that can be recovered and used in a variety of end-applications. Emerging circular businesses, regional market models, and supportive policies are creating opportunities to drive its recovery and reintegration.

ECCC convened stakeholders through a February 2024 workshop and subsequent working group, to explore current wood recovery and reintegration practices and identify small and medium sized enterprises (SMEs) active in this sector.[4] This foundational work led to the development of several material flow diagrams and narratives describing the systems and commercial opportunities available in Canada to recover wood from CRD activities and reintegrate it in the economy[5, 6] , and publication of ten case studies (to be available on the Circular Construction Canada website, under Resources) illustrating the work of various organizations. These efforts highlighted the need for further market research to better understand the scope of circular economic activity in Canada with regard to reclaimed wood.

The section below summarizes key definitions and concepts referenced in this report and built on previous work by ECCC.

Sources of Recovered Wood

Primary sources of recovered wood include new construction, renovation, demolition, deconstruction, and wood product manufacturing. Each source produces different types and qualities of wood, which influence recovery potential and market value.

New construction generates offcuts and unused materials from residential and commercial projects. This material is generally of high quality because it has not yet been installed, coated, or exposed to contaminants.

Renovation produces a mixture of salvaged wood and wood products from deconstruction and demolition, and virgin offcuts and excess materials during construction. Renovation waste can range from high quality, reusable components (e.g., solid wood cabinets, doors) to more difficult materials to reclaim due to finishes, adhesives, or embedded fasteners and nails. As buildings age, the need for maintenance increases, which in turn drives

1 Delphi Group in Partnership with Dillon Consulting. (2023). Economic & Environmental Assessment of Waste Diversion in Canada's Construction & Demolition Sector Study; and referenced by Government of Canada. (2024). Opportunities for circularity of wood in construction, renovation and demolition in Canada, Workshop report.

2 Delphi Group. (2021). Circular Economy & the Built Environment Sector in Canada. Final Report

3 Government of Canada. (2024). Opportunities for circularity of wood in construction, renovation and demolition in Canada, Workshop report.

4 Government of Canada. (2024). Opportunities for circularity of wood in construction, renovation and demolition in Canada, Workshop report.

5 Government of Canada. (2025). Material flow: Reintegrating wood from CRD sector – Sources to products

6 Government of Canada. (2025). Material flow: Reintegrating Wood from CRD Sector - Incorporating recycled content.

higher volumes of renovation-related materials entering the waste stream. Communities with older homes tend to generate more renovation waste, ranging from minor cosmetic updates to extensive structural repairs.

Demolition is a significant potential source of reclaimed wood. Traditional mechanical demolition frequently results in comingled and damaged materials, which significantly reduces their recoverability and market value. When buildings are taken down quickly, components that could have been reused are often broken, contaminated, or compacted, effectively rendering the material unrecoverable and the material value lost.

Deconstruction, by contrast, is an approach designed to maximize recovered material quantity and quality. Instead of tearing down a structure, deconstruction involves disassembling components carefully and systematically. This can include salvaging doors, flooring, cabinetry, window frames, architectural elements and structural framing lumber. Because materials are removed intact, deconstruction yields higher quality recovered wood than demolition and supports higher-value reuse and recovery markets.

Wood product manufacturing generates preconsumer waste such as offcuts, trimmings, and rejected pieces from prefabricated construction, furniture, cabinetry, and flooring production. This material is generally clean and uniform, making it suitable for recovery or conversion into value added products.

Practices that favour on-site source separation, material tracking and intentional salvage (e.g., deconstruction or 'soft-stripping' prior to demolition) significantly increase the volume of wood that can be reclaimed and reused. Conversely, practices that result in co-mingled or damaged materials immediately increase the likelihood that materials end up in landfill or used in low-value applications.

Stakeholders and the Reclaimed Wood Value Chain

The ecosystem for CRD wood (and other building materials) involves diverse activities and stakeholders, each impacting the quality and fate of recovered wood. The stakeholders that comprise the wood recovery value chain are outlined below, informed by previous work conducted by ECCC.[7]

Generators/Harvesters

Generators and harvesters are the actors responsible for supplying wood materials to the market. Deconstruction and salvage firms play a central role by dismantling structures to preserve wood for reuse or reintegration.

Collection and Sorting

Material haulers and recycling centres support this process by transporting, receiving, and sorting wood materials into recoverable streams. Reuse centres, material exchanges, and brokers, whether operating through physical yards, online platforms, or both, connect suppliers with potential buyers, helping to ensure that reclaimed wood materials enter the market for additional value generation.

Processing and Manufacturing

After wood materials have been sorted and prepared, they can be processed, resold or donated. Once processed, manufacturers produce a range of reclaimed wood products for enduse applications. The source of the wood significantly influences its quality, value, and potential enduse.[8] Clean wood, which is free from contaminants

7 Definitions reference work done by Environment and Climate Change Canada, Circularity of Wood in Construction – Stakeholder Ecosystem Diagram.

8 Environment and Climate Change Canada. Material Flow- Sources to Products: Reintegrating Wood from Construction, Renovation & Demolition (CRD) Sector.

such as paint, chemicals, and preservatives, can often be reused or recycled into higher value products. Treated wood (also commonly referred to as 'dirty' wood) contains preservatives, glue, paint, or other chemical additives. Contaminated wood may contain nails, fasteners, or residues from being commingled in mixed loads. Processing can address contaminants (e.g. removal of nails, fasteners) and prepare the wood for higher value applications (e.g. furniture, flooring). Treated wood that is stained or painted (e.g. flooring) can also be processed into higher value applications. In other cases, contaminated wood is not suitable for processing into higher value products (e.g. if reclaimed wood involves lead-based paints) and such wood is relegated to lower value applications (e.g. waste to energy).

Retail

Retailers sell recovered or reintegrated wood materials and products, connecting waste recovery output to end-users and projects.

End Users

End users of reclaimed wood encompass a diverse range of groups and industries, spanning both structural and non-structural applications. Residential and commercial markets use higher value reclaimed wood in applications such as lumber and other building materials (including structural beams[9], flooring, interior finishes, and furniture—cabinets, etc.), intermediate products (e.g., particleboard and medium density fibreboard (MDF) and outdoor products, including siding, decking, and fencing. In addition, several specialty industries make use of reclaimed or lower grade wood, including as bedding for agriculture, and mulch for landscaping. Low grade material is also often sent to downcycling applications, such as landfill cover and conversion into biomass energy. And finally, DIY homeowners frequently repurpose wood for personal projects.

9 Environment and Climate Change Canada. March 2025. Reintegrating CRD Wood in the Economy: Constructing a Mass Timber Visitor Centre. PkCn-Summ-EN-FINAL.pdf

2. Project Scope and Objectives

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ECCC commissioned two studies, each designed to address different aspects of the market for construction, renovation and demolition (CRD) wood waste.

One study, by Canadian Wood Council, assessed secondary market opportunities for recovered CRD wood materials. The report focuses on the technical, commercial, and standards foundations necessary for broader secondary markets (including structural reuse) over time, moving beyond isolated pilots toward regional scalability and consistent market growth. This study can be found on the organization's website The Canadian Wood Council (CWC).

This Light House study focuses on the recovery and reintegration of wood materials generated from the CRD sector across Canada. Its objective is to examine the current state of CRD wood reuse and reclamation in Canada; identify small and medium-sized enterprises (SMEs) involved in the generation, collection, processing, and value-add of CRD wood materials; understand existing supply chains, business models, endmarkets, and areas of potential market growth; and highlight challenges and opportunities that could be supported or enhanced through policy interventions.

For the purposes of this study, reintegrated wood is defined as post-consumer wood that can be used again in high-value applications, such as construction, furniture, wood-based insulation and other durable applications, preserving materials in their original form as much as possible. Reintegration excludes pathways that downcycle materials, including waste to energy, landcover, and landscaping applications.

3. The Case for Recovered Wood

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Building markets for recovered wood has the potential to support the transformation of Canada's resource economy by enabling new business development, while also significantly reducing waste from CRD activities, reducing greenhouse gas (GHG) emissions and preserving embodied carbon.

Virgin fiber is declining due to climate change, reductions in allowable annual cuts, and conservation measures aimed at protecting sensitive habitats.[10] Closures and curtailments of forestry mills in British Columbia and other regions have also contributed to unemployment and underemployment, underscoring the need to develop complementary business models, diversify economic activities and identify new pathways for job creation.

Economic Opportunity

Wood accounts for nearly 40% of all waste generated from the construction, renovation, and demolition sector in Canada. National estimates suggest that approximately 3.6 million tonnes of wood generated annually from CRD activities are potentially available for recovery and reintegration.[11] From an economic perspective, one industry whitepaper issued by the Vancouver Economic Commission, Unbuilders, and the BC Institute of Technology in 2020 determined the value of salvaged wood itself at $342 million per year in Metro Vancouver, not including revenue from value-added applications.[12]

In this context, the volume of CRD wood waste presents an opportunity to help address wood material supply gaps if a greater proportion of this resource is recovered. Harnessing even a fraction of the estimated wood generated through CRD activities can complement the forestry sector and support the creation of direct and indirect jobs across the recovery, processing, and reuse value chain.

CRD Activities

One factor impacting the market potential for recoverable wood is the scale of demolition in urban centres across Canada (others include construction practices and renovations), which is set to grow as governments and builders make room for new and densified housing. The potential for recovery and successful reintegration of this wood will be shaped by the dwelling type, development pressures, deconstruction methods versus traditional demolitions, variations in market maturity, (e.g., capacity to recover and process material), motivation and incentives for partnerships and coordination among various value chain actors (e.g., deconstruction/salvage operators, builders, developers, designers, architects and engineers) and the availability of secondary markets, buyers and end-users. Figure 1 provides annual historic and forecasted single-family homes demolitions in seven urban centres.[13]

10 FPInnovations, Overview of Canadian CRD Wood Waste Recycling and Valorization Ecosystem, InfoNote, accessed January 14, 2026.

11 Diane Schorr and Gabrielle Boivin, Overview of Canadian CRD Wood Waste Recycling and Valorization Ecosystem, FPInnovations Info Note 15 (September 2023).

12 Kinsey Elliott, Erica Locatelli and Carl Xu. July 2020. The Business Case for Deconstruction. Vancouver Economic Commission.

13 G. Yaron, Coulter, M. & Wang, S. 2025. Home Relocation and Renewal Feasibility Study. Light House Sustainability Society. Our Research - Light House

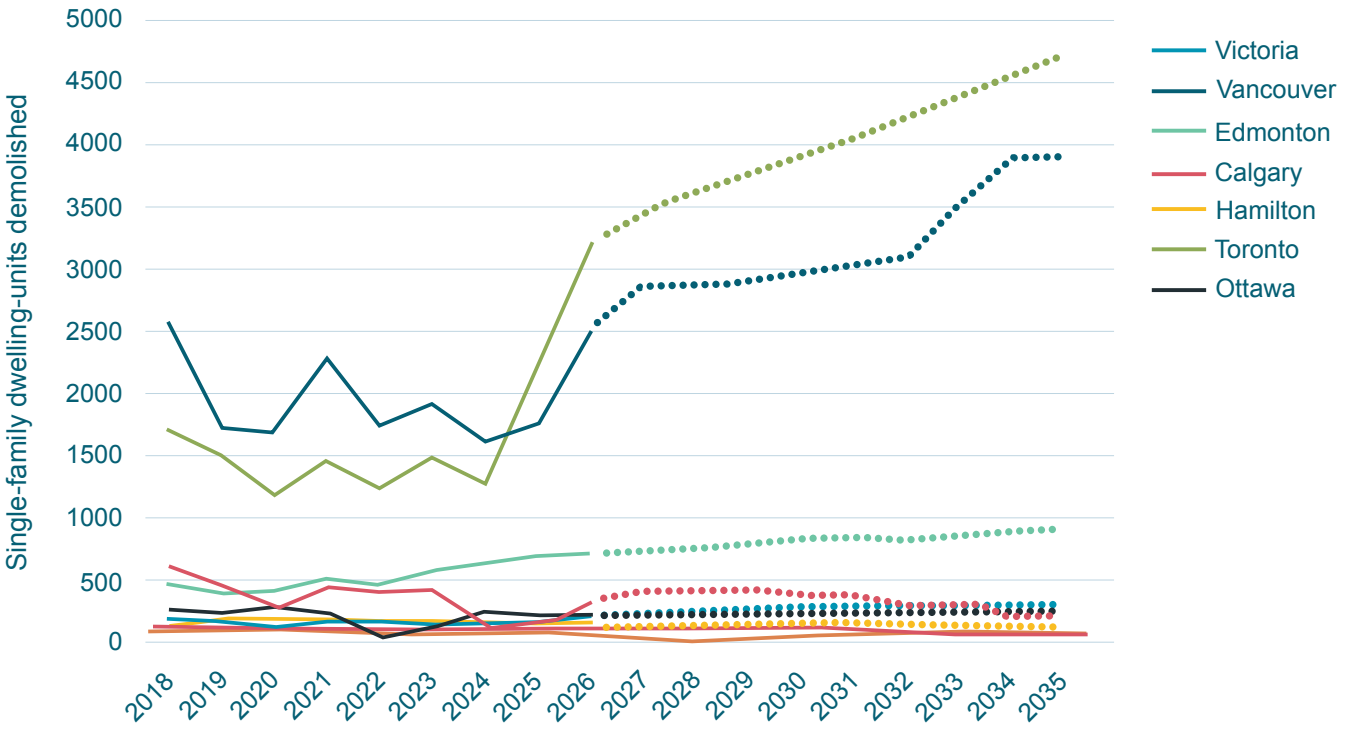


Figure 1: Annual Historic/Forecasted Single-Family Home Demolitions by Target Urban Centre (2018-2035)

A typical 1,300 sq ft wood-frame single family home is estimated to contain 65.4 tonnes of building materials, of which almost half (approximately 28.8 tonnes) is wood material.[14] As shown in Figure 1, demolition-related waste, including wood, is projected to nearly double by 2035 compared to 2024 in Toronto and Vancouver, indicating potential market growth for recoverable wood materials over the next decade.

Shifting from demolition to deconstruction enables the recovery of a significant share of the wood materials currently generated from demolitions. In a typical residential deconstruction, between 16 to 25 percent of materials can be reused and between 30 to 70 percent recycled.[15,16] In addition, designing new homes and buildings for disassembly can help achieve recovery rates at the higher end of these ranges.

Demolition typically involves using mechanical means to tear down a structure and haul the co-mingled materials directly to the landfill. In contrast, deconstruction involves multiple touchpoints across the value chain, including onsite materials management, warehouse and storage operations, value-add manufacturing and retail activities. All these stages create opportunities to advance skills development, employment and market development for SMEs. According to the Baltimore Wood Project, deconstruction creates at least twice as many jobs as traditional demolition.[17] While this statistic is not material-specific, the high proportion of wood in single family homes suggests that deconstruction would generate direct employment opportunities related to wood recovery.

14 Metro Vancouver. Demolition Waste Generation Rates Calculator | Metro Vancouver

15 Delta Institute. (May 2018). Deconstruction & Building Material reuse: A Tool for Local Governments & Economic Development Practitioners. Deconstruction-Go-Guide-6-13-18-.pdf

16 Insights were gathered through Light House interviews with companies involved in deconstruction.

17 U.S. Department of Agriculture Forest Service. (2020). The Urban Wood Workbook: A Framework for the Baltimore Wood Project (NRSINF3720). Northern Research Station.

Wood has different characteristics based on its vintage, so as a result, CRD wood materials will have varying economic opportunities and potential applications. One example of how wood vintage influences recovery potential is old growth, which refers to lumber sourced from forests that were not previously logged. Species are region-specific, with common types including Douglas-fir, Western Red Cedar, and Hemlock. Old-growth forests have been integral to Canada's economy for more than 300 years and have long been prized for their high-value timber, making them an important resource for the wood industry. Given its material properties, old-growth wood is ideal for premium applications such as heritage home restoration and furniture manufacturing. Recovering and reclaiming old-growth wood during deconstruction ensures that the material value of this resource is retained and fully utilized.[18]

Old growth logging was widespread in many parts of Canada until the mid20th century. As a result, homes built before 1960 in regions where old growth harvesting was common (from Figure 1, Toronto, Victoria and Vancouver) are likely to contain a high proportion of oldgrowth lumber. An interviewee shared that SPF lumber sourced from second growth forests did not become common in Vancouver construction until the 1990s, suggesting that homes built prior to this period may also contain recoverable old-growth wood. The scale and distribution of old-growth wood could support a wide range of recovery, resale, and reuse market opportunities.

GHG Emissions & Embodied Carbon

In addition to deconstruction practices, construction and renovation activities can also be improved to maximize material value. Designing for longevity, adaptability, and disassembly of buildings and components is important to ensure wood can be recovered and reused at the end of its life in high-value applications. For example, in mainstream building practices wood components are cut into pieces and are connected through embedded fasteners that damage the wood and must be extracted before material recovery. Planning for material reintegration after building disassembly ensures the quality of wood will be higher, and it will be more cost effective to repurpose.

By prioritizing reuse, repair, refurbishment, and remanufacturing, materials remain in service longer, supplementing virgin wood resources and lowering the overall environmental footprint associated with CRD activities. In the built environment, this footprint also includes embodied carbon emissions, the GHG emissions released during the entire lifecycle of a material or product before it is part of a building and including its disposal.[19] For wood, embodied carbon includes the emissions associated with extraction of raw materials (e.g., logging for wood), processing and manufacturing into lumber, transportation to the construction site and the actual construction activities. It also includes emissions generated through the maintenance, repair, and disposal of the wood at end-of-life.[20] In a well-designed system, reintegrated wood can offer a lower-carbon alternative to virgin materials by reducing or avoiding harvesting, processing, and transportation stages. Diverting wood also prevents methane generation from the material decomposing in landfills.

As discussed in this section, recovering CRD wood can decrease dependence on virgin wood, mitigate environmental impacts across the built environment, and support Canada's economy through associated value chain activities. Section 4 presents the study's methodology, while Section 5 provides an analysis of the characteristics of SMEs active in wood recovery and reintegration.

18 Information on old-growth wood provided through interviews with stakeholders in wood reuse and reclamation.

19 Canada Green Building Council. 2021. White Paper: Embodied Carbon: A Primer for Buildings in Canada.

20 B. Belitski, C. Magwood, H. Pope. November 2025. Building A Low Carbon Future: Exploring Feedstocks & Products For Canada's Construction Sector" Natural Resources Canada. Ontario, Canada. 2025.

4. Methodology

4. Methodology

The study was conducted between September 2025 and February 2026. To achieve the objectives outlined in Section 2 the following methodology was applied:

4.1 Study Design

1. A data tracking template (database) was developed to capture and sort findings. Data from entities was collected and organized under the following categories:
    - Industry sector
    - Industry subsector
    - Value chain (business activities)
    - Organization type (*e.g., non-profit, corporation, cooperative*)
    - Revenue
    - Employee counts
    - Development stage (*e.g. startup, growth, maturity*)
    - Geographic locations
    - Business models
2. Entities were grouped into three categories: Enablers, Brokers and SMEs. Enablers support the market and serve as industry network platforms (e.g., industry associations). While not included in the database, Technology Enablers are entities that support SMEs through the distribution of technologies that could manage or process recovered wood. Brokers are entities that facilitate the transaction of recovered wood and reclaimed wood products and therefore are connected to a broad range of companies. SMEs are the individual companies themselves involved in CRD wood recovery and reintegration.
3. Business entities were compiled from a number of sources, including:
    a. A company list provided by Environment and Climate Change Canada (ECCC);
    b. Light House industry database;
    c. An online scan using AI search tools (Chat GPT, Perplexity, and a model within Chat GPT); and
    d. Dedicated industry directories and databases.
4. Preliminary interviews were carried out with ten key Enablers in the fall of 2025 to identify additional small and medium sized businesses.
5. An online survey was administered between November 2025 and January 2026. The survey was sent to 515 entities with 46 completed responses received (8.9% response rate).
6. A second round of interviews were conducted with six entities (Enablers, Brokers and an SME) in January 2026.
7. Virtual webinar was held on March 2026 to present research findings and engage industry, municipal government and non-governmental organizations.

4.2 Limitations and Gaps

While the study generated valuable insights, several factors influenced the depth of analysis and provided considerations for future research and study.

Survey Response Rate: Despite a good response rate, the range of respondents was not representative of all industry sectors. Also, to encourage response rates survey participants were not required to submit their name, company, or contact information, which limited the ability to associate survey responses with pre-existing entries in the project database.

Scope of Data Provided: Some respondents chose not to answer certain survey questions, which limited sample sizes and data collection for some categories. Desktop analysis was used to supplement the survey responses where possible, however, information related to economic activities (e.g., revenue) was generally not publicly available.

Industry Awareness: Interviews revealed a general lack of awareness about SME activities across the sector, suggesting the need for targeted outreach and education on wood recovery and reintegration market dynamics in Canada.

Market Ecosystem: While the initiative developed a robust list of companies, it is by no means exhaustive. It is well understood that many SMEs are engaged in the recovery and reintegration of wood on an informal basis or for single projects. In addition, there are many informal pathways for recovering wood material that are difficult to identify (e.g., peer-to-peer exchanges, DIY upcycling and free piles at contractor sites).

Regional Bias: As Light House is based in Vancouver, British Columbia (BC), data may be skewed towards BC due to stronger awareness of local SMEs operating in the region.

5. Market and Ecosystem Overview

5. Market and Ecosystem Overview

Several thousand entities were identified for the database through market research, interviews, and desktop analysis. From this initial list, SMEs were included in this analysis if there was direct evidence that they interact in some capacity with recovered wood (e.g., statements during interviews or in online survey responses, information on the company's website, statements made on social media or in press releases, etc.). Through the survey, some SMEs expressed interest in being involved in wood recovery and/or reintegration. Table 1 highlights the number of SMEs identified in the database that are either directly involved in wood recovery and reintegration or have expressed interest in integrating wood reclamation into their activities.

SMEs are defined as commercially active organizations with fewer than 500 employees that generate sales or service revenue. Government funded facilities were excluded. Entities that were engaged with recovered wood for use only in low-value applications (e.g., waste-to-energy, land-cover, landscaping) were also excluded from this study.

Table 1: SMEs identified in the database as involved in wood recovery and reintegration

Confirmed Direct Involvement in Wood Recovery and/or Reintegration	252
Self-Identified Interest in Wood Recovery and/or Reintegration	15

The following subsections (5.1–5.9) present aggregated characteristics of the 252 companies identified as being directly involved in wood recovery and reintegration. For the purposes of this analysis, "SMEs" refers to all organizations within the set of 252, regardless of whether they operate as for profit or nonprofit entities.

Sample sizes for each characteristic and corresponding confidence levels vary depending on survey response rates, and publicly available information about SMEs obtained through secondary research. The findings are generally skewed toward non-profit organizations because of the large presence of Habitat for Humanity Restores operating across Canada.

5.1 Industry Sector

Organizations were classified according to their primary or most dominant activity or based on how survey respondents self-identified. Not all SMEs fit neatly into a single category. Six main industry sectors were identified for wood recovery and reintegration activities. The category descriptions are outlined below:

- **Deconstruction/Demolition-** work directly on sites to dismantle and salvage wood materials for recovery.
- **Waste Management-** involved in the collection, sorting, and recovery of materials; primarily part of the supply side of the value chain.
- **Builders/Trades-** create products or structures through construction, custom fabrication, or trade-based services.
- **Designers-** end-users, such as architects and industrial designers, who source or incorporate recovered wood into projects.
- **Manufacturers-** produce finished products using recovered wood.

- **Retail-** sell finished products online or through physical storefronts but do not manufacture the products themselves.

The Retail category dominates because of the 102 Habitat for Humanity Restores operating across Canada that handle reclaimed building materials.

Figure 2 shows the distribution of companies by industry sector. The sample size is 252, including all identified SMEs.

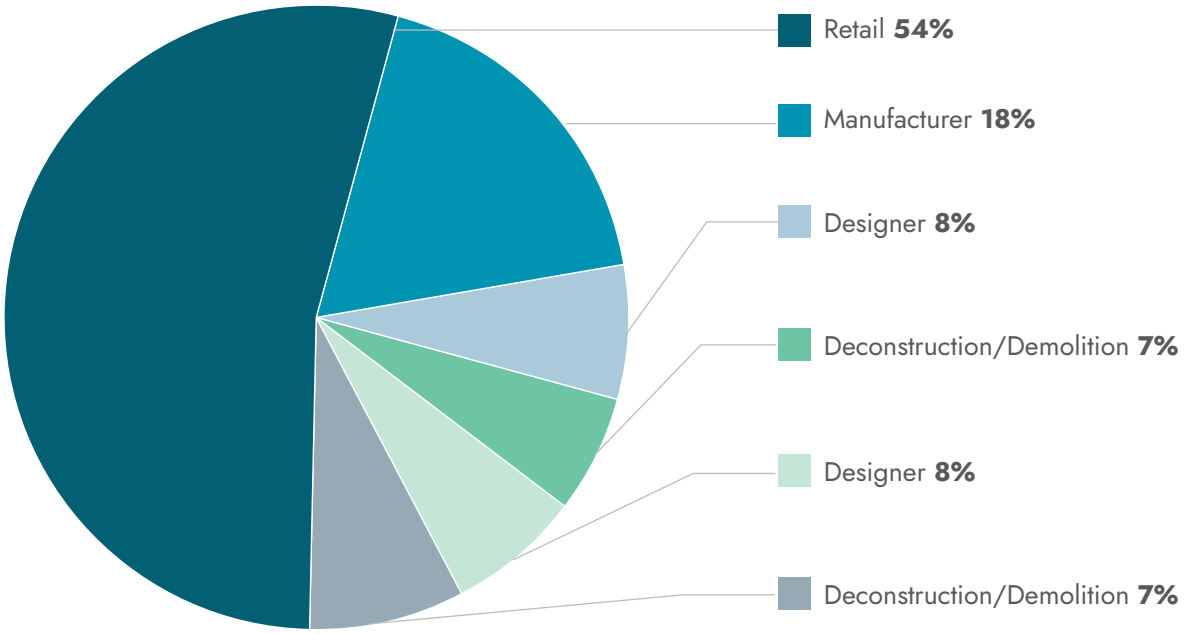


Figure 2: SMEs by Industry Sector (n=252)

5.2 Industry Sub-Sectors

The sectors in Figure 2 were divided into sub-sectors to classify the specialty or focus area for each SME. Again, SMEs do not all fit neatly into one sub-category and often engage in several types of activities. In total, 14 subsectors were identified,[21] including:

- **Architect-** specifies and integrates reclaimed wood into building design
- **Artisan-** fabricates custom products from reclaimed wood using skilled, small scale or handcrafted processes
- **Builder-** delivers low volume projects with flexibility to use reclaimed wood
- **Composite wood products-** manufacturer that incorporates wood fiber and other materials into products
- **Deconstruction/salvage-** dismantles buildings and components to maximize material value
- **Developer-** delivers high volume projects requiring standardized and reliable material supply

21 The Developer and Interior Design categories were (<1%) and removed from the chart for improved readability.

- **Interior design-** planners and designers for interior spaces
- **Interior finishes & furniture-** produces and/or supplies flooring, trims, cabinetry or furniture
- **Outdoor Products-** produces and/or supplies fencing, siding, decking, and outdoor furniture
- **Pre-fab-** produces pre-manufactured building components
- **Reprocessing and remanufacturing facility-** intermediary facility that repairs, refinishes, or transforms used wood products or components to prepare them for reintegration or reuse in new products or structures
- **Reuse centre-** facility or storefront that accepts, sorts and/or sells reusable/high-quality CRD wood materials
- **Trades-** skilled workers or contractors specializing in specific construction tasks; includes film and set design
- **Waste collection and recovery-** receives, sorts, processes or recovers CRD wood materials

Habitat for Humanity (HfH) ReStores accounts for a large share of the Reuse Centre subsector (94%). Each HfH location was included because they function as potential material receivers and play a key role in CRD wood reuse across provinces.

Figure 3 shows the distribution of SMEs by industry subsector. The sample size is 246; six SMEs classified under *Developers* and *Interior Design* were excluded from the chart due to their small representation.

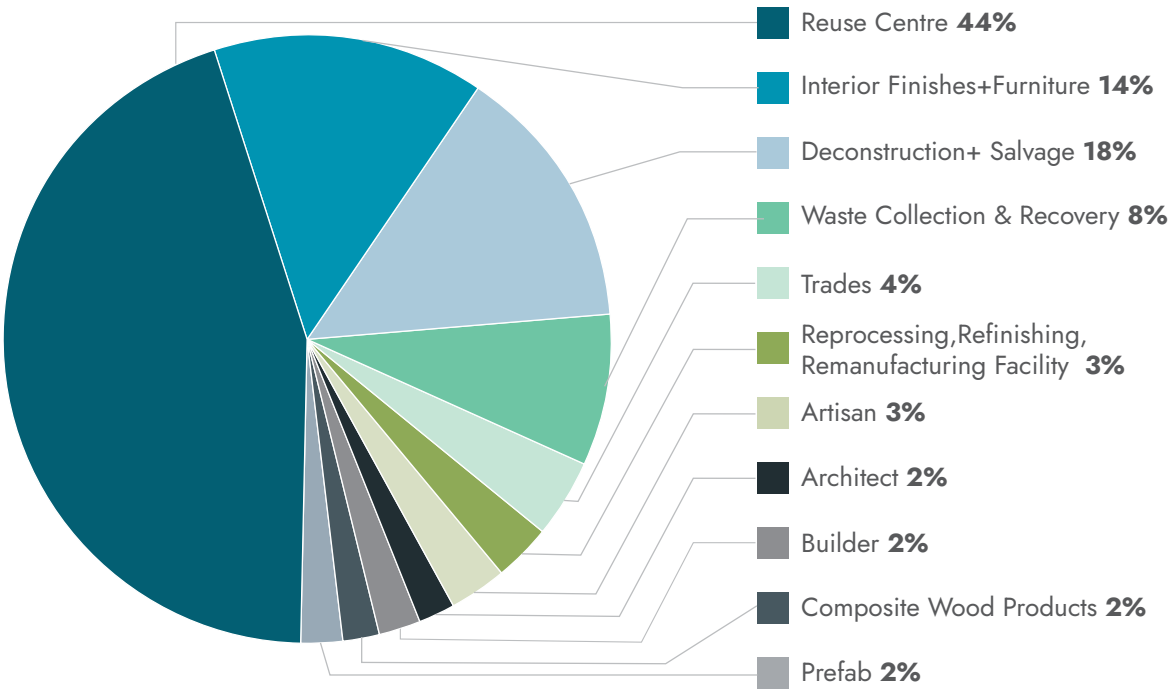
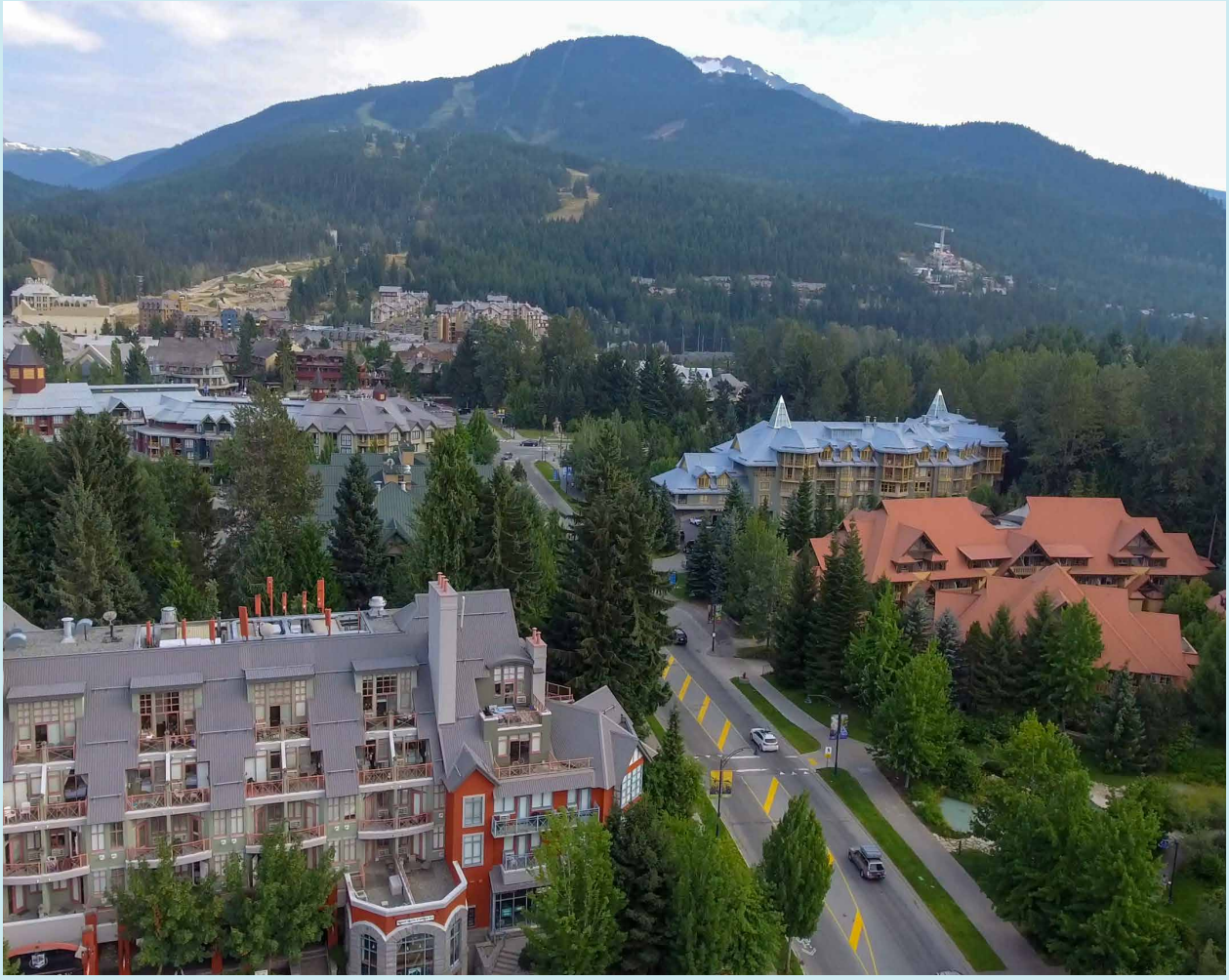


Figure 3: Distribution of Companies by Industry Subsector (n=246)

CASE STUDY:
Whistler Transfer Station Salvage Program (British Columbia)



High-quality wood waste can be reused for a range of structural and non-structural applications. One of the challenges is obtaining consistent and accessible volumes of sorted wood material. Policies that incentivize diversion and source separation help drive the supply of clean wood for reuse and high-value recovery. Waste facilities can implement variable tipping fees to encourage contractors to separate reusable wood and help connect this supply with local and regional demand.

A pilot program at the Whistler waste transfer station launched in the summer of 2025 and allowed contractors and residents to drop off reusable wood (no fasteners) at a reduced rate and pick up materials for free at a designated area. This program illustrates how low-barrier access to recovered materials can stimulate local reuse markets. The municipality continued its reduced tipping fee for reusable wood, now set at $135 per tonne below the clean wood rate.

Source: RMOW Report to Council

5.3 Value Chain

The value chain for recovered and repurposed wood is a set of connected stages that facilitate material flow in the system. This section identifies the value chain activities(s) in which the identified SMEs are involved; brief descriptions are provided below.

Generators and harvesters generate unused or waste materials with potential for recovery and reuse. Through their activities, they supply recovered wood to the market. As previously noted, wood materials can originate from a range of activities, including demolition and deconstruction projects, construction sites, restorations, retrofits and renovations, and manufacturing processes (excess materials and off cuts).

Collector activities include gathering, transporting, and sorting wood materials for processing.

Processors convert recovered wood into forms that can be used again in production. This includes preparing wood as feedstock for new manufacturing processes, remanufacturing it into standardized or restored components for reintegration, and creating value added goods through further design or fabrication.

Retailers act as distribution channels by marketing and selling recovered wood materials back into the market for reintegration into various end use applications.

End-users are organizations that purchase or use wood materials or finished wood products. Some examples include:

- Architects, designers, and contractors use reclaimed or reused materials in construction and interiors.
- Set designers and creative industries seeking unique or character rich wood.
- DIY users and makers, purchasing small volumes for personal or craft projects (e.g. planter boxes).
- Manufacturers, particularly those producing remanufactured or composite wood products.

Table 2 classifies SMEs according to their primary activities along the wood recovery and reintegration value chain. The sum of SMES involved in all value chain steps exceeds the total number of organizations identified because some SMEs are vertically integrated and involved in several value-chain steps. For example, a business may process and refinish wood products while also engaging in retail activities.

Table 2: Number of SMEs involved in each step of the value chain

Value Chain Step	Number of SMEs
Generating	32
Collecting/Gathering/Sorting for Disposal	31
Processing, manufacturing, finishing	71
Retailing	177
End User	45

CASE STUDY:
Vancouver Island Circular Economy Hub

On Vancouver Island, a circular economy hub has been established to pre-process and standardize reclaimed wood for reuse through activities such as denailing, trimming, grading, and quality control (**The ReUse People**). The hub is being scaled to supply a consistent pipeline of reclaimed wood for a range of buyers and end-users, including contractors/developers for structural projects and film and set designers.

Major suppliers of recovered wood include residential deconstruction companies operating under the City of Victoria's *Demolition Waste and Deconstruction Bylaw*. The contractor managing wood materials under the Capital Regional District's wood ban at the Hartland Landfill is also now supplying highquality recovered wood to the hub.

5.4 Organization Type

The modern market for recovered and reintegrated wood consists of a full range of SMEs, including:

- **B Corporation-** For profit business certified for meeting high social and environmental performance standards
- **Cooperative-** Business owned and democratically controlled by its members
- **Corporation-** Legally separate business entity owned by shareholders, offering limited liability and structured governance
- **Non-profit-** An organization that uses its revenue to serve a mission rather than distribute profits to shareholders
- **Partnership-** Business owned by two or more people who share profits, responsibilities, and legal obligations
- **Sole proprietor-** Business owned and operated by a single individual, with no legal distinction between the person and the business

In the context of reclaimed material, the legal status of an entity can have a material impact on the company's activities. For example, under tax laws, charitable organizations can issue charitable tax receipts for the fair market value of recovered wood received as a donation from demolition/deconstruction companies. The deconstruction companies pass the tax credit on to the homeowner or developer to offset removal costs. B-Corporations can consider more than profit, allowing them to align more closely with the environmental objectives of recovering and reintegrating wood.[22]

Figure 4 shows the distribution of SMEs by organization type based on survey responses. The sample size is 40, reflecting only those SMEs that responded to this survey question (including one Habitat for Humanity Restore).

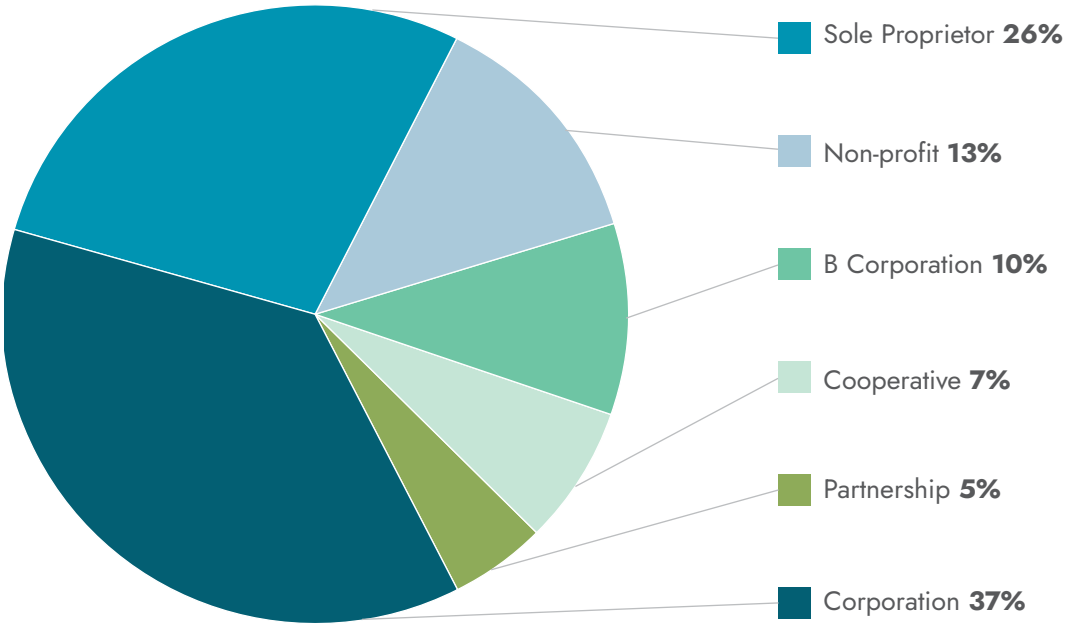


Figure 4: SMEs by Organization Type from the Survey (n=40)

22 A B Corporation is a for-profit company that has been certified by B Lab for meeting standards on social and environmental performance, accountability, and transparency. It is assessed on things like how it treats workers, its environmental practices, its governance, its impact on communities, and how transparent it is about its operations.

Figure 5 shows the distribution of SMEs by organization type based on combined survey responses and the additional 101 Habitat for Humanity (HfH) Restores. The sample size is 141, reflecting those SMEs that responded to this question and the other HfH Restores located across Canada.

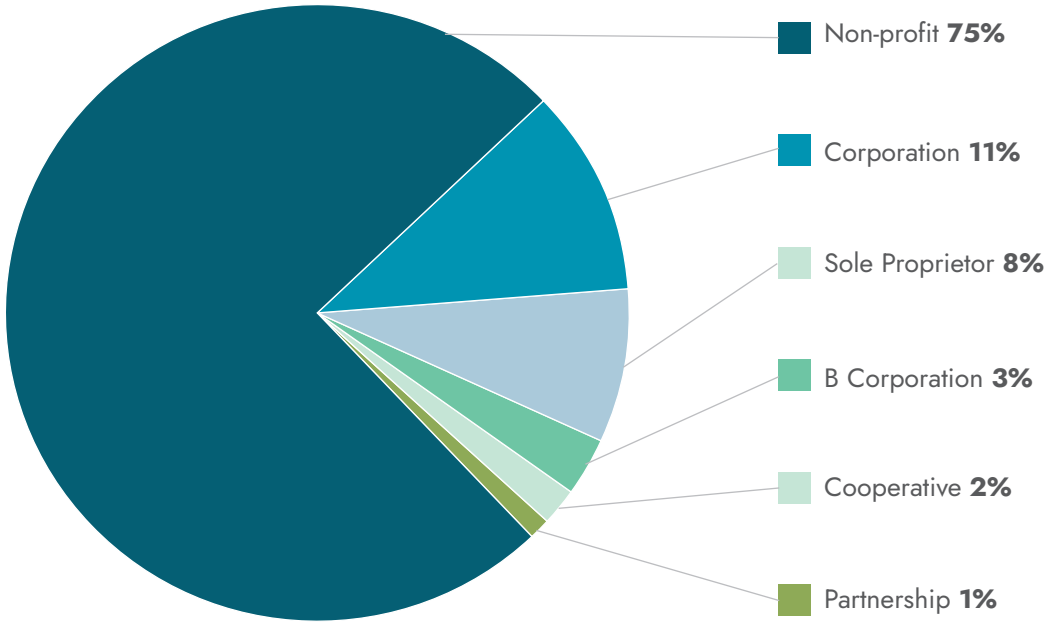


Figure 5: SMEs by Organization Type Including HfH (n=141)

5.2 Revenue

Revenue characteristics provide insight into the scale, stability, and maturity of the wood recovery and reintegration market, informing assessments of business viability, value distribution across the supply chain, and the sector's potential for growth.

Revenue data presented was collected through self-reported survey responses. Since SMEs revenue information is not typically publicly available, the sample is limited to respondents who answered this question. Consequently, and given the exploratory nature of this initial market research, the findings should be interpreted as indicative of emerging opportunities rather than as a generalized estimate of sector-wide performance.

More than half of respondents reported annual revenues below $1 million. However, one-third of respondents reported revenues between $1 million and $10 million.

Figure 6 shows the distribution of SMEs by revenue. The sample size is 26, reflecting only those SMEs that responded to this survey question.

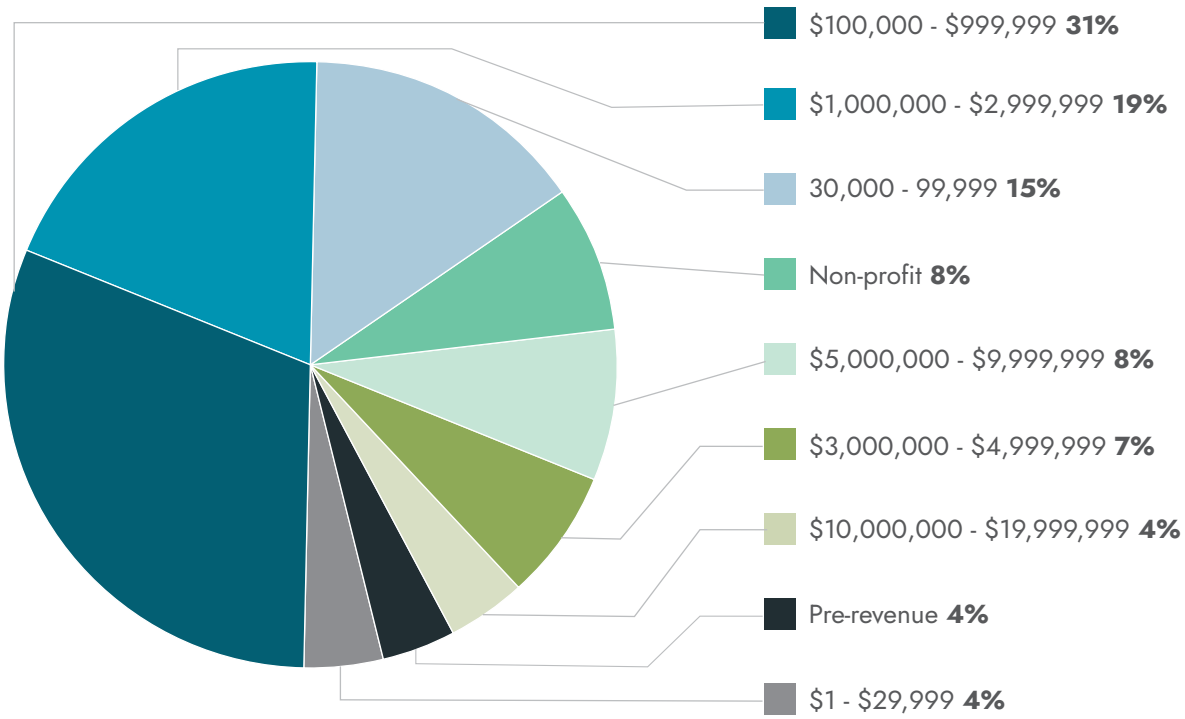


Figure 6: SMEs by Reported Revenue (n=26)

5.6 Employee Count

Employee count characteristics provide insight into the organizational size, operational capacity, and labour intensity of SMEs active in the wood recovery and reintegration market. Understanding workforce size helps contextualize the sector's structure, distinguishing between microenterprises, small businesses, and more established operations, and offers an additional indicator of sector impact.

The sample size for this characteristic is also smaller since it relied on self-reported responses in the survey. Therefore, this data can be considered preliminary rather than representative of the whole sector. Most identified SMEs engaged in wood recovery and reintegration are small operators with about 83% employing 20 people or less.

Figure 7 shows the distribution of SMEs by employee count. The sample size is 29, reflecting the SMEs that responded to this survey question.

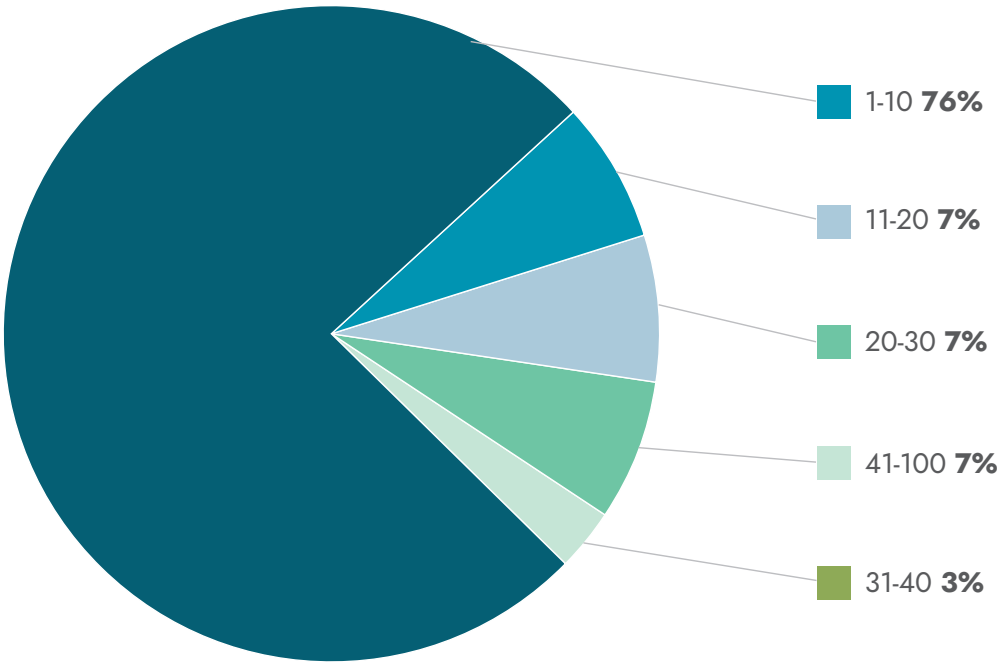


Figure 7: SMEs by Employee Count (n=29)

CASE STUDY:
Cooperators Insurance Pilot (Calgary and London)

Following natural disasters, large volumes of CRD materials enter the waste stream through the claims process. Strengthening practices for salvage can redirect more materials, particularly wood, toward new applications.

In response to increased waste volumes generated by flood and storm damage, Cooperators Insurance launched a pilot initiative in partnership with the Circular Innovation Council and local recycling companies. The pilot explored how insurers, restoration contractors, and reuse organizations could collaborate to identify salvageable materials and redirect them to reuse and recycling pathways rather than disposal.

In September 2024, the pilot began handling real insurance claims, and stakeholders involved in the pilot suggested the process could become a standard industry practice.

Source: Insurance Business

5.7 Development Stage

Development stage characteristics provide insight into the organizational maturity and business readiness among active SMEs in the sector. SMEs are represented across the business lifecycle, by the following categories:

- **Start-up**- young business building its product or service and establishing customers and operations
- **Growth**- business expanding revenue, customers, and/or operational capacity
- **Maturity**- stable business with established markets and processes
- **Decline** - business experiencing shrinking demand or increased competitiveness.
- **Renewal**- business pursuing reinvention

Development stage data presented in this section were collected through self reported survey response and, as such, the sample is not a representative estimate for the entire sector. Nearly half of the SMEs identified (46%) are at a mature stage, suggesting the presence of established business models and potentially favourable market conditions.

Figure 8 shows the distribution of companies by the development stage. The sample size is 24, reflecting the SMEs that responded to this survey question.

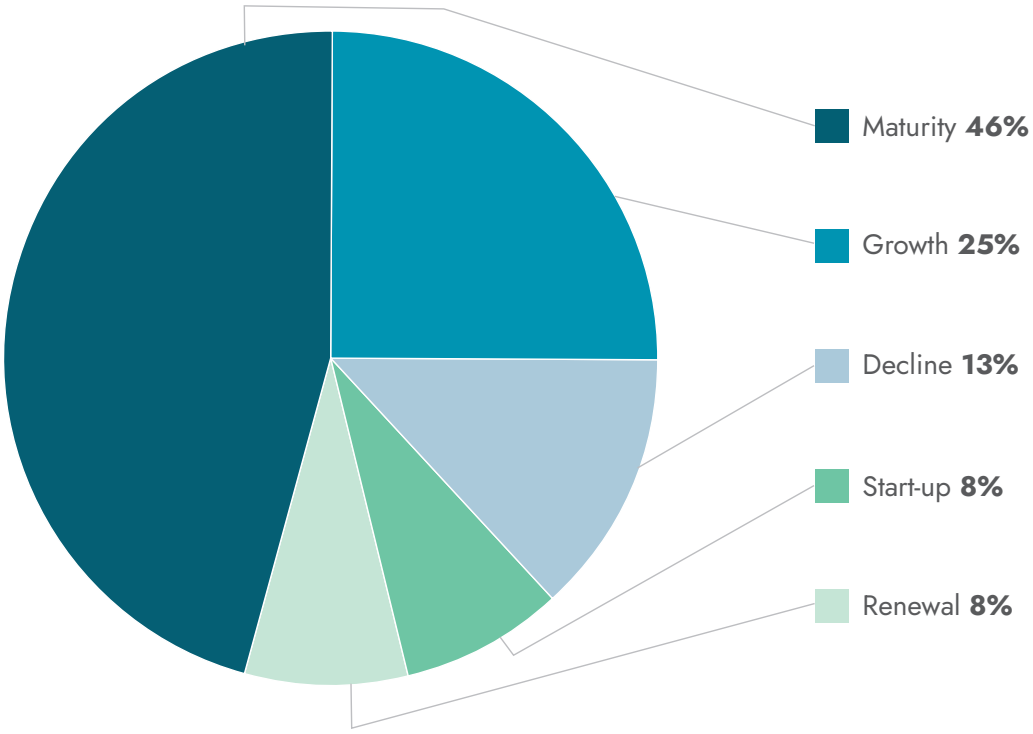


Figure 8: SMEs by Development Stage (n=24)

5.8 Geographic Location

The geographic location characteristic organizes the SMEs by province or territory. This data enables comparison of how SME activity differs across regions and helps identify potential market gaps along the value chain. Gaps in specific value chain activities (e.g., processing) can highlight opportunities where targeted programs, funding, and policy interventions could be most beneficial.

The identified SMEs engaged in wood recovery and reintegration closely mirrors the reported distribution of CRD wood waste generated across Canada[23] and the provincial/territory population share. Ontario, Quebec, and British Columbia, the most populous provinces, also have the greatest number of SMEs engaged in the sector.

Somes SMEs operate across multiple locations or within an undefined service area (e.g., deconstruction companies). In these cases, a primary business location was identified based on where the organization is registered or as listed on its website. Habitat for Humanity ReStores were included as separate locations, as they are less interdependent and are influenced by local policies, partnerships and the communities they serve.

Figure 9 shows the distribution of all 252 identified SMEs by geographic location.

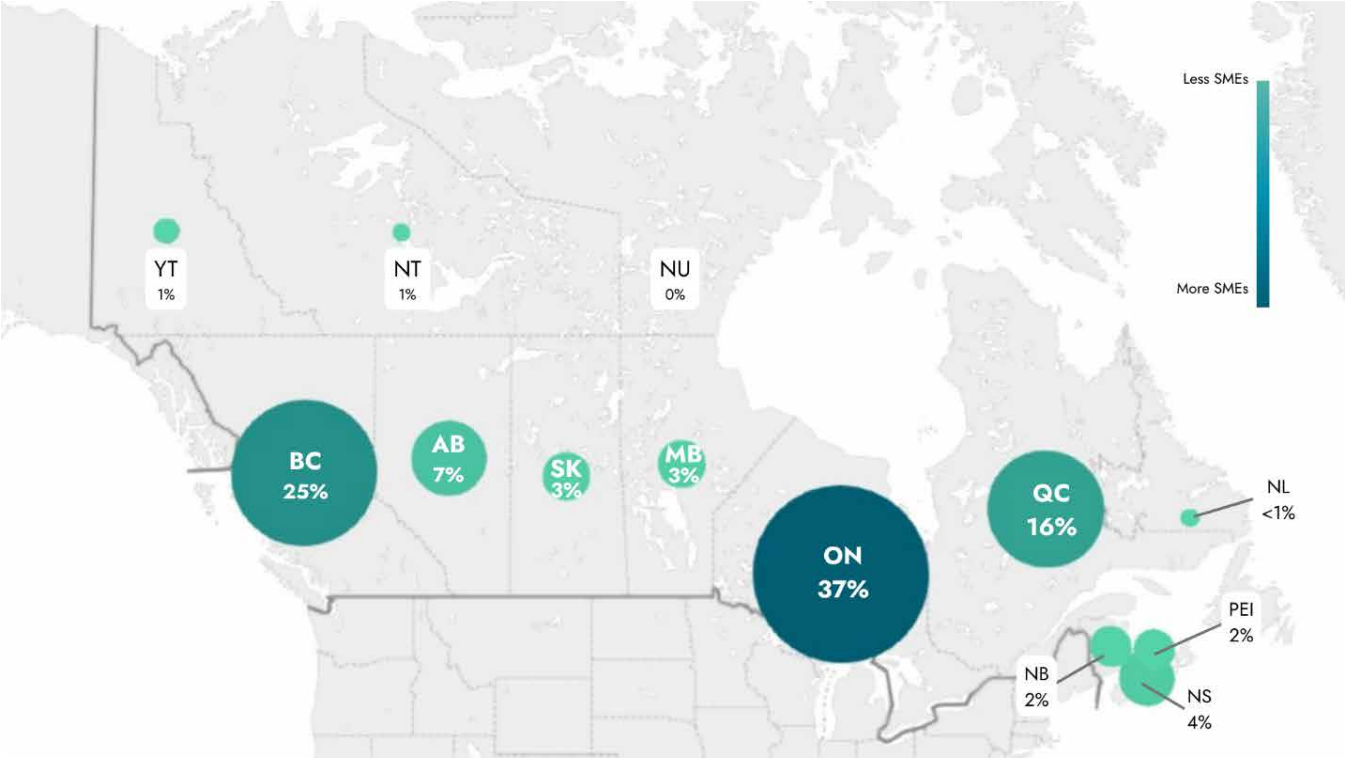


Figure 9: Percentage of SMEs by Geographic Location (n= 252)

Value chain activities were compared across Ontario (ON), Quebec (QC) and British Columbia (BC)—the three provinces with the highest number of active SMEs involved in CRD wood recovery and reintegration.

23 Schorr, D., Ph.D., & Boivin, G., M.Sc. InfoNote. September 2023-no.15. Overview of Canadian CRD wood waste recycling and valorization ecosystem. FPInnovations-InfoNote2023N15E.pdf

Figure 10 shows the value chain steps for British Columbia, Ontario and Quebec for the 198 identified SMEs located in these regions. Counts across value-chain steps exceed 198 because some SMEs are engaged in multiple stages.

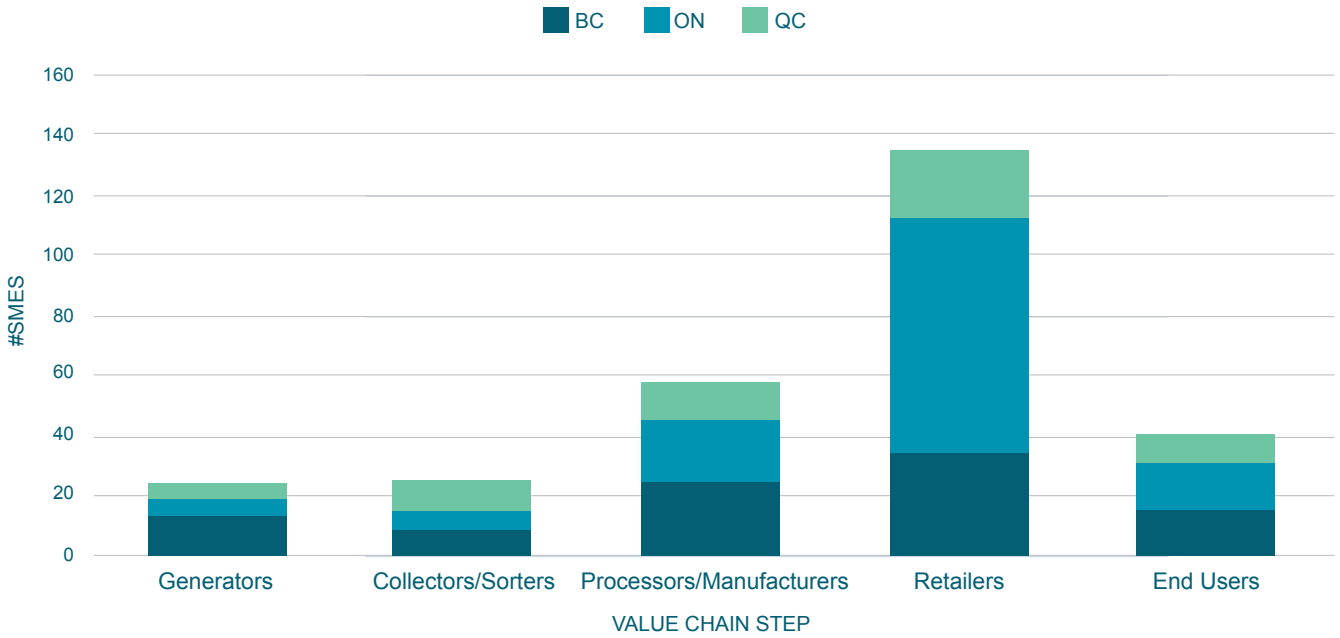


Figure 10: SMEs by Value Chain Step and Location

Across all three provinces, collection activities were the least represented segment of the value chain, potentially because some of this work is carried out or supported by larger actors and municipal waste and recycling programs/facilities. In addition, the greatest imbalance exists between retailers and the relatively small number of collectors/sorters and end users. Perhaps indicating both gaps and opportunities for strengthening material supply and endmarket development. British Columbia had the highest number of SME generators, which may in part be linked to deconstruction bylaws that incentivize material salvage in several municipalities. Additional information on municipal efforts across Canada is available through Environment and Climate Change Canada's case study, Municipal CRD Material Recovery and Reintegration: From Demolition Waste to Circular Resource Management.

Interviews revealed that industrial-scale reclamation remains limited across Canada. Reclaimed wood markets also vary regionally, with demand appearing higher in Eastern Canada, where a greater number of industrial designers incorporate reclaimed wood into their work. In contrast, few industrial designers in Western Canada were identified as working with reclaimed wood at scale.

Regional insights further highlight differences in material flows and processing capacity. In Quebec, one manufacturer reportedly uses CRD wood material for approximately half of its particleboard feedstock and has invested in sorting and cleaning technologies to support this practice. Quebec also has a wide network of government-supported recycling centres, which may provide more readily accessible and consistent volumes of wood waste.

In Saskatchewan and across the Prairies, interviewees described companies repurposing reclaimed wood—such as material sourced from decommissioned grain elevators—into nail laminated timber (NLT), demonstrating emerging opportunities in value added processing.

5.9 Business Models

Business models demonstrate how SMEs convert recovered or reintegrated wood into economic value and long-term viability. Where possible, the operations and business models for the identified SMEs were explored to support understanding of the sector's performance and potential.

Interviews and research showed many variations in business models, possibly due to the region, development stage of the SME, regulatory environment and market conditions. This section shares some high-level examples of business models in the sector.

A key feature of some business models is local feed stock sourcing and/or local end-markets, which reduces transportation costs, GHG emissions, and risk due to supply chain disruptions.

One example is **MSL Fibre,** a manufacturing company that developed 100% recycled fibreboard panels. One of their products, SONOClimat ECO4, is an insulation panel containing 31% post-industrial wood and 46% post-consumer wood. Additionally, all feedstock for this product is generated within a 150 km radius of their facility in Louisville, Quebec.[24]

Two reoccurring business model elements identified among SMEs were:

1. **Multiple stages of the value chain**: Some SMEs operate across multiple stages of the value chain, allowing them to manage supply, production, and sales internally. This vertical integration enables them to remain flexible and adapt to fluctuations with supply and market demand.
2. **Partnerships**: Wood material recovery and reintegration are enhanced through structured business-to-business partnerships, occasional collaboration and sometimes industrial symbiosis (material exchange between organizations).

The following are some examples of vertically integrated companies:

Deadstok Muskoka operates across the full value chain. The company sources reclaimed wood from suppliers (wood recovered from old buildings), processes and manufactures products, and sell reclaimed lumber and custom products directly to customers. This integrated model allows the business to control material quality, reduce reliance on external suppliers, and capture value at each stage of production.

Ouroboros Deconstruction combines deconstruction services with retail operations. The company recovers structural and architectural materials and components through deconstruction activities and subsequently sells these materials through its own retail channels. This model contributes to efficient and higher-value recovery by creating a direct link between material salvage and market distribution. See a case study with Ouroboros on page 35.

DEMXX operates a salvaged material retail yard in Coombs, BC and an online storefront that sells a curated inventory of materials salvaged through their own deconstruction activities.

The following examples illustrate how SMEs have incorporated partnerships into their business models:

Re4m Design and Fabrication is a studio specializing in industrial design, engineering, and woodworking that builds custom fixtures, displays, furnishings, and products from upcycled materials. Through its Circular Innovation Program, the studio partners with organizations that generate reoccurring waste material streams (e.g., wood), such as construction companies and retailers, and transform those materials into new functional products.

24 MSL Fibre, SONOClimat ECO 4 LEED Product Sheet

VEMA Deconstruction and ETRO Construction partnered to deconstruct a large industrial building in Burnaby, BC. Through this project more than 170,000 pounds of wood was recovered, including glulam beams, tongue and groove, and Douglas Fir old-growth lumber. The material will be reintroduced into the market as modular panels (in collaboration with Kiwi Innovation), outdoor products, and interior finishes.

Habitat for Humanity accepts CRD materials for reuse and can issue charitable tax receipts for their fair market value. This creates opportunities for contractors and demolition companies to donate high-quality wood materials while supporting Habitat's mission of making homeownership accessible for more families in Canada by building, repairing, and financing homes, advocating for equitable pathways to homeownership, and developing housing affordability solutions.

Keep it Green Recycling provides film sets and production offices with collection bins for dimensional lumber through a partnership with UrbanJacks, a finger-jointed lumber manufacturer. The bins can collect a range of used and unused wood of various dimensions. Keep it Green Recycling facilities collect and store the wood materials from various entertainment industry actors like sets, studios, schools, and other community groups, and UrbanJacks sorts, processes and remanufactures this wood materials into new products to be reintroduced into the economy.[25]

Another example is **ABMT Wood Solutions**, which has partnered with **VerEco Homes**, a net zero homebuilder, to supply reclaimed wood sourced from deconstructed grain elevators. These materials are incorporated into VerEco's residential construction projects, demonstrating how partnerships between reclamation enterprises and builders can support both circular economic objectives and sustainable construction practices.

CASE STUDY:
Design Showcase & Renovation Project (Toronto)

As Toronto continues to experience significant growth through renovation, densification, and redevelopment, large volumes of reusable materials are generated through demolition and renovation activities (especially wood). This project demonstrated how material salvage and reuse can support circular economy objectives while contributing to high quality design outcomes.

The project was delivered through two complementary components that combined concept and practice. A curated design exhibition showcased objects, furniture, fixtures, and installations created by local designers and artisans using salvaged and reused materials. This was paired with an applied residential renovation project that embedded deconstruction, salvage, and reuse directly into the construction process and interior finishes, offering a real world example of how reused materials can be successfully reintegrated into contemporary building projects.

After this project, **Ouroboros Deconstruction, Daniel Gruetter and DesignTO** launched a material salvage warehouse and showroom with reclaimed wood materials and upcycled finished products.

25 Directors Guild of Canada (2025). The Green Scene: An Exciting New Local Sustainability Partnership - Wood Recycling

6. Challenges & Opportunities

6. Challenges & Opportunities

Across interviews with industry, researchers, and organizations, a consistent message was that the main barriers to recovering and reintegrating wood are not simply technical. While interviewees did identify important technical challenges, especially contamination, grading, regrading, testing, and code acceptance, they more often pointed to broader market and system gaps that prevent viable reintegration pathways from taking hold. These include weak policy signals, limited financial incentives, inadequate storage and processing infrastructure, poor data on material flows and sales, fragmented supply chains, and underdeveloped end markets for higher-value applications.

At the same time, interviewees also identified clear opportunities to address these gaps through better coordination, regional hub infrastructure, improved standards and testing pathways, stronger market-development supports, and targeted policy interventions.

The following subsections summarize the barriers and opportunities identified by interviewees as they relate to expanding markets for recovered wood in Canada grouped under the following themes:

- Policy Intervention
- Infrastructure
- Market Development
- Information Sharing
- Research & Development
- Training and Skills Development
- Data Acquisition & Management

6.1 Policy Intervention

Barriers

- High costs of deconstruction, lack of policy drivers, and limited financial incentives mean landfilling or diversion to low value secondary markets (e.g. mulch, energy) often remain the default for wood waste.
- Municipalities and owners/developers were identified as key levers, but most municipalities do not actively incentivize reuse or source separation (e.g., variable tipping fees).
- Bans on landfilling wood or strong carbon policy exist elsewhere (notably in Europe) but are not yet driving change in Canada.
- IC&I waste tonnages are significantly higher than residential, yet municipalities rarely manage IC&I waste streams directly, limiting regulatory reach.[26]
- One interviewee stated that the tax receipt issuing process is still in its infancy in Canada, and there is a need to establish workflows and processes that allow charities to confidently appraise donations and issue receipts.

26 Delphi and Dillon Consulting, Economic & Environmental Assessment of Waste Diversion in Canada's Construction & Demolition Sector, for Environment and Climate Change Canada, April 2023

Opportunities

- Policy innovation is already visible in pockets of Canada (e.g., Victoria's deconstruction bylaw requirements), creating models that could be adapted to other regions.
- Interviewees identified opportunities for the following:
  - Variable fees can encourage separation of clean or reusable wood.
  - Surcharges for contaminated or mixed loads. For example, Metro Vancouver applies a charge to loads of garbage containing over 5% clean wood at regional disposal facilities.[27]
  - Provincial or federal support for carbon focused policies recognizing the value of reclaimed wood.
  - Integrating reclaimed wood into codes and standards, particularly as academic groups progress on grading and nondestructive testing methods.

Incentives to address the incremental cost of deconstruction have been successfully implemented in other jurisdictions (e.g. Portland's deconstruction incentives).

6.2 Infrastructure

Barriers

- Many regions lack dedicated facilities for processing wood waste, which significantly limits opportunities for material recovery and reuse.
- Even where facilities do exist, there is often misalignment between processing capacity and actual material supply or market demand.
- The size and capacity of existing SME operations is not sufficient to meet the potential demand within the region.
- Existing operations differ in their processing equipment and approaches. If processing operations could be more centralized by region, skills could be tailored to find the most efficient ways of receiving, storing and processing materials. Approaches could be more consistently executed, to support client confidence and acceptance, and facilitate oversight and certifications. Furthermore, access to equipment to process at a higher-volume commercial/industrial scale, using best available practices, could reduce capital expenditures for individual firms, and/or enable specialization of firms for particular equipment and products. Collectively, these changes could improve the overall economics of processing, reduce barriers to entry for companies, and facilitate multiple higher value secondary markets.
- Many regions lack the storage, staging, and preprocessing capacity needed to handle reclaimed materials at scale. Small-scale receiving areas limit collection, processing and storage capacity – which, in turn, limits the ability of operators to fill smaller batch orders. With more space, and more generators contributing to a regional receiving area, materials could be collected and organized to achieve greater volumes of like materials, fill larger orders and support more stable supply and demand within a region.
- Inconsistent material acceptance criteria and intake restrictions create a gap between potential recycling pathways and the infrastructure that is realistically accessible today.
- Many industries capable of remanufacturing reclaimed wood are located in more remote areas. Long hauling distances combined with high transportation costs often make it more economical for haulers to

27 Metro Vancouver. Solid Waste. Together We're Keeping Clean Wood Out of the Garbage.

dispose of wood at the nearest (or typically least expensive) landfill rather than transport it to reuse or processing facilities.

- Lack of data available for salvaged material sales records. Need an MLS-like framework to track inventories and pricing for deconstructed material which would allow charities like Habitat for Humanity to issue their charitable tax receipts even faster for deconstruction contractors.
- A need for dedicated receiving capacity for large structural members such as glulams and big timbers, which do not fit conventional charity or reuse-store channels.

Opportunities

- Development of regional mid-stream hubs to manage sorting, de-nailing, grading, consolidation, and/or retail.
- Improved logistics networks, source separation, and material aggregation can support more economical material flows, while partnerships between local governments, haulers, and processors can help pilot more efficient logistics and transport models.
- Underutilized infrastructure and sites in key population centres could be leveraged to collect, sort and store CRD wood, with spaces designed for safe public access, small-business salvage, and contractor/retail staging.
- Reward desirable alternative approaches. For example, lower disposal fees for separated materials to incentivize source separation before and during transport to waste management facilities.
- Adopt policy that requires behaviour change and penalizes bad actors (e.g. landfill bans for wood).
- In remote regions, incremental improvements (e.g., temporary storage, targeted sorting programs, mobile processing) may be more practical than large capital investments but could still enable smaller batch demand of varied, or commonly recovered similar, wood materials.

6.3 Market Development

Barriers

- Limited mid-stream storage, processing infrastructure, and inconsistent inbound supply of clean materials make it challenging to build reliable markets.
- Weak or underdeveloped end markets mean recovered wood often lacks stable buyers, limiting commercial viability.
- Clean streams are expensive to produce, and current market pricing does not reward the added effort of sorting and contamination control.
- The demand for wood-fibre for biofuel creates a strong driver to downcycle recovered wood, as it provides a consistent market for generators. As demand for biofuel grows, it could undermine efforts to maintain high-quality recovered wood in its highest and best use unless better sorting and more robust markets are established.
- A need to lower the cost of deconstruction through process innovation, not just policy support.
- The bottleneck is not end use in principle, but feedstock quality and logistics.
- Wood fibre, MDF, and composite markets are promising but capital-intensive and risky, especially at larger scale.

Opportunities

- Mid-stream hubs (e.g., circular-material yards, consolidation sites) offer promise in stabilizing supply and enabling higher-value processing.
- A growing ecosystem of market actors, including deconstruction companies, reuse organizations, technology developers, biochar facilities, and panel board producers using CRD wood, demonstrates rising demand.
- Academic studies on design for disassembly, reclaimed-wood engineered products, and wood-flow modelling can inform market development and policy alignment.
- There is potential to deconstruct houses as panels rather than disassembling every layer, creating a different product stream for laneways, sheds, and prefab structures.
- There are major opportunities for deconstruction companies to partner with value-added manufacturers on a range of products, including:
    - Millwork, banisters, window frames, flooring, and other architectural products
    - Wood fibre insulation
    - Modular prefab tiny homes, prefab laneway homes
    - Prefab auxiliary structures/offices manufacturers
    - Engineered products for prefab and off-site construction, including laminated timber (DLT, NLT, CLT)
    - Furniture
    - Back-framing, shoring, scaffolding, concrete formwork, and other construction-support uses.

6.4 Information Sharing

Barriers

- Need for more open-source tools, particularly for collectors, to help identify facilities that accept or purchase specific wood materials and to clarify where these materials can be delivered.
- Lack of coordination and collaboration leads to duplicated efforts which put additional pressure on already limited financial resources. It also limits the ability to align supply and demand (in terms of timing or physical proximity).
- A persistent myth among contractors that materials set aside for recycling will still end up in landfill, which weakens motivation to sort and separate.
- A lack of awareness among some parts of the sector about who is active in reclaimed wood, including limited visibility into architects, designers, and certification pathways.
- The market currently depends heavily on intermediary and convening organizations, not just buyers and sellers.

Opportunities

- Creation of a national platform to facilitate exchange of information amongst industry participants about challenges and successes, sharing best practices, and working together to find solutions to issues and challenges.
- Sharing pilot project findings and case studies to help stakeholders across jurisdictions to learn from one another.

6.5 Research & Development

Barriers

- Technologies and processes for reusing and recycling wood already exist, but achieving clean, uncontaminated material streams at reasonable cost remains challenging. Non-magnetic metal contamination is a specific technical problem in processing wood waste.
- A need for a clearer and less burdensome regrading pathway for reclaimed wood. The ability to divert wood towards certain applications like reuse in construction projects requires additional steps, including structural material testing. Lack of grading standards and limited building-code recognition are critical constraints.
- Industry—academic research partnerships can be difficult to secure, which limits advancement of novel approaches, processes and products, and slows commercial adoption of academic innovations.
- Mixed material products are a significant challenge. Technologies to separate adhesive from wood exist in Europe but are not available in North America. Spray foam and glued modern assemblies make newer homes harder to deconstruct and reduce recoverable value.

Opportunities

- Pilots for achieving better material sorting on construction sites.
- Academic research is underway at UBC, Concordia, Lakehead, UNB, Manitoba, and others is advancing to develop novel approaches and products to boost the demand for reclaimed materials, including non-destructive testing of reclaimed timber, engineered products using reclaimed materials (e.g., NLT from grain elevators), and protocols for disassembly-ready design.
- Finger-jointed interior walls and recycled elements in prefabricated panels are two major opportunities in the near term.
- Improved standards and shared grading solutions could unlock structural reuse pathways, especially if linked with mid-stream hubs.
- Optical vision, sensors, robotics, and AI sorting tools could help detect contamination, improve sorting accuracy, and stabilize quality.

6.6 Training and Skills Development

Barrier

- Limited trained personnel, expertise and knowledge to assess and perform material recovery, source separation, deconstruction, and use of reclaimed materials.
- Approximately 76% of identified SMEs have only 1—10 employees (Figure 7), placing significant cost and resource burden on them as they manage administrative responsibilities in addition to their operations

Opportunities

- Offer retraining programs for workers impacted by mill closures and transitions in legacy industries.
- Existing skills training programs can be adopted to include circular economic principles and hands-on, project-based learning.

- Cooperatives, sharing economy models and B2B present opportunities to reduce these burdens and support growth for individual businesses as well as the broader market.

6.7 Data Acquisition & Management

Barriers

- The lack of public data on wood waste volumes prevents credible market sizing and weakens the investment case for new facilities or businesses.
- The lack of verified transaction data for salvaged materials prevents credible appraisal and slows development of tax-receipting systems.
- Market intelligence on solution providers currently relies on private databases and closed networks rather than open public systems.

Opportunities

- A national appraisal portal or shared sales data platform could standardize inventories, improve valuation, and lower appraisal costs.

7. Factors for Success

7. Factors for Success

Pulling together findings from the interviews, survey, and market research, this section identifies the enabling conditions and practices to drive market growth and success for SMEs involved in wood recovery and reintegration. The factors are organized according to the categories outlined in Section 6, with the addition of 'Investment'.

The categories are highly interrelated, with policy intervention, investment, infrastructure and market development serving as the primary drivers to enable market growth, while the remaining categories provide important complementary support. Adoption and integration should be guided by stakeholder needs and feedback, available resources, and the strategic priorities of governments and industry partners.

Figure 11 highlights the eight 'Factors of Success' that will support the wood recovery and reintegration market.

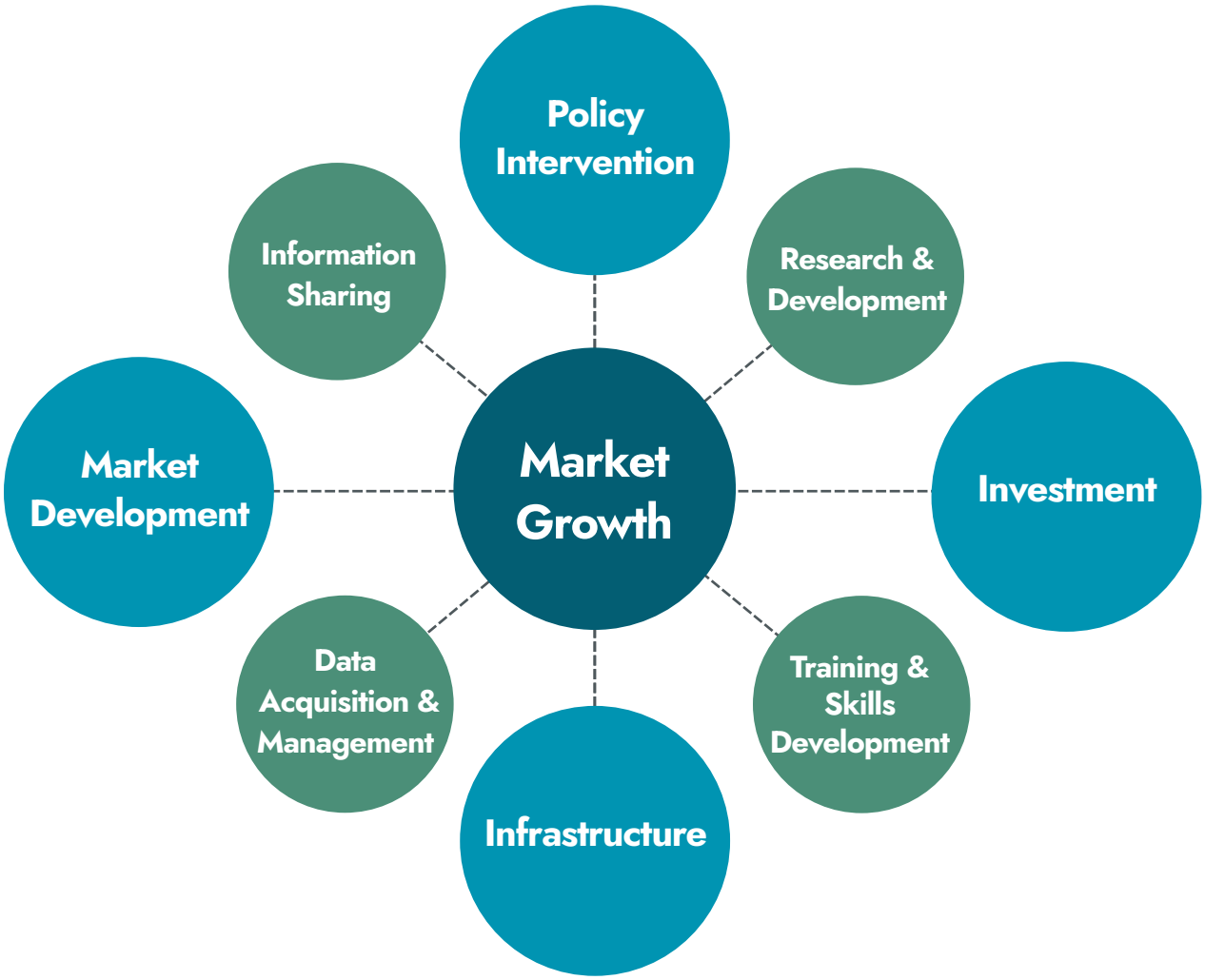


Figure 11: Key Factors Driving SME Market Growth

CASE STUDY: Wood Recovery in Burnaby

The city of Burnaby ties a waste diversion requirement to its demolition permits and is achieving, even exceeding, its 70% diversion rate (achieving about 87% diversion across all building types). The city has recently turned its attention specifically to wood recovery. In October 2025, Council approved a 2026 engagement process for staff to explore adding a lumber salvage requirement for pre-1950 homes and raising diversion targets from 70% to 90% for most other demolitions. Accessory buildings such as carports and sheds would likely be excluded due to limited salvage potential.

7.1 Policy Interventions

Market growth requires policy support across all the categories highlighted in Figure 11. Some examples of policy interventions at the municipal level may be considered for replicability in various jurisdictions — as outlined in a recent ECCC case study on the efforts of municipalities to advance CRD circularity. Some regions and municipalities have introduced measures — often combined as more than one in parallel - to support recovery of separated wood loads. For example, they have identified clean wood as a recyclable material[28], banned it from disposal in landfill,[29,30] and applied a surcharge (e.g. 50%) to loads of waste containing over a certain percentage (e.g. 5-10%) of CRD materials including clean wood at regional disposal facilities.[31,32] Multiple cities also own and operate transfer centres, and recycling and waste centres/landfills that accept separated clean wood at a designated location within their facilities for a fee that is lower than standard tipping fees.[33,34,35,36,37]

28 Calgary's Recycling bylaw for commercial waste and Waste Bylaw

29 Metro Vancouver's Tipping Fee and Solid Waste Disposal Regulation Bylaw No. 379 (2024), Clean Wood Disposal Ban.

30 Clean wood is described as mandatory recyclable material effective January 1, 2024 as described in Hartland Landfill Tipping Fee & Regulation Bylaw No. 6

31 Surcharge and thresholds described in Metro Vancouver's Disposal Ban Program Manual 2026.

32 In Calgary's Disposal Surcharge Inspection Program, if a load contains 10% or more of the listed CRD materials, the surcharge will apply.

33 Examples in Metro Vancouver: Solid Waste System, Vancouver South Transfer Station, Vancouver Landfill & Zero Waste Centre.

34 Capital Regional District's Hartland Landfill Public Drop-off Depot and Reno & Demo Waste.

35 Regional District of Fraser—Fort George Mackenzie Select Waste Landfill and Regional Transfer Station, Tipping Fees.

36 Source separated wood waste accepted at Mission Flats Landfill and Landfill Diversion Area in the City of Kamloops.

37 Separated recyclable wood is accepted for recycling in Calgary as described Landfill Commercial materials and rates and Business recycling and disposal options at City landfills

Since regulatory changes (e.g., codes and standards) require significant time and resources to implement, early emphasis on voluntary participation, incentives and guidelines will be helpful near-term ways to establish systems for collection and processing and secondary markets. As will efforts to integrate reclaimed wood through non-structural building components, which can accelerate adoption and build industry buy-in. As an example, Hennepin County's Building Reuse Grant Program in Minnesota offers incentives (up to $5,000) to homeowners that use salvaged materials in their renovation, remodeling or new construction projects.[38]

Where regulatory tools are absent or still emerging, sequencing policy through pilots, demonstration projects, and variable tipping fees can support market development before introducing mandatory measures such as landfill bans. Prioritizing the development of secondary markets ensures recovered wood is directed to higher-value uses rather than only low-value energy recovery or dumped illegally.

Supply Levers: supporting supply development and early capacity building.

1. Financial and tax incentives
    - **Municipal/Regional**
        - Grants, subsidies, or reduced property taxes for deconstruction (similar to incentives used in other sectors), home relocation, and use of reclaimed wood (through a phased approach).
    - **Federal**
        - Ongoing tax credits for donated CRD materials.
2. Cost signals
    - **Municipal/Regional**
        - Variable tipping fees that provide lower rates for sorted or recoverable materials (e.g., clean wood versus contaminated wood)
        - Compliance deposits tied to material recovery outcomes on construction sites.

Demand Levers: establishing predictable demand ahead of mandating supply measures.

- **Federal**
    - Public procurement calls that help drive demand for reclaimed materials by incorporating incentive mechanisms, such as rated criteria point awards, into tender evaluations).
    - Best practice guidance for incorporating reclaimed materials, with a pathway toward recognition of reclaimed wood in the National Building Code.
        - There could be alignment with Build Canada Homes priorities, including multi-unit prefabricated modular housing.
    - Embodied carbon limits or benchmarks for new buildings that recognize reclaimed wood as a strategy for reducing life-cycle emissions.

38 Hennepin County, Building Reuse Grants.

7.2 Investment

Strategic funding from both public and private sources is essential to support SMEs as they scale operations, adopt new technologies, and access higher value markets. Beyond individual entities, funding also supports sector wide capacity, collaboration, and market innovation. Key investment sources include:

- **Federal investment:**
  Federal support for market development, including involvement from the National Research Council (NRC) across multiple areas such as applied research and development (e.g., innovative materials/composites, grading/testing methods, and standards), and direct support for SME innovation through programs such as the Industrial Research Assistance Program (IRAP).
- **Private investment:**
  Private capital, including impact investors, venture capital firms, and mission-aligned funds (e.g., not for profits), to support the growth, scaling, and commercialization of SMEs.

7.3 Infrastructure

Regional circular economy hubs (such as the Vancouver Island hub referenced on page 26) serve as midstream, preprocessing intermediaries, connecting recovered CRD wood to processors, buyers and end-markets. This model demonstrates how municipal policies and contracts can incentivize generators and haulers to divert wood from landfill, while centralized hubs prepare materials for reuse, remanufacturing, or further reclamation.

Introducing a dedicated intermediary to manage material flows allows contractors, haulers, processors, and endmarket SMEs to focus on their core operations without taking on coordination, storage, or processing functions that may be too resource intensive for any single organization. Hubs can start with basic infrastructure, and scale as volume and value chain partners grow.

Regional circular hubs support success by:

- Providing space for sorting, grading, preprocessing, and temporary storage, helping maintain clean, consistent, and reliable material supply.
- Coordinating and consolidating material flows among haulers, deconstruction contractors, reuse organizations, and processors.
- Reducing transportation demands through decentralized drop-off and pickup locations. Hubs may also incorporate modular or mobile processing facilities to respond to local market and community needs.
- Enabling municipal policy by providing receiving facilities for recovered wood materials generated as a result of deconstruction bylaws and landfill wood bans.
- Supporting regional self-sufficiency by retaining recovered wood and its associated economic value within local and regional markets.

Federal circular network:

- At the federal level, establishing a national data portal to map stakeholders and material flows could improve transparency and coordination across the recovered wood value chain, supporting market development while helping reduce supply-chain bottlenecks and material price volatility.

7.4 Market Development

Building capacity and reducing operational barriers for SMEs are critical to scaling wood recovery and reintegration. Coordinated training, shared services, and collaborative business models can enable SMEs to specialize, reduce costs, and participate more effectively in circular wood value chains.

Key enabling approaches include:

- **Cooperative frameworks** that allow SMEs to share administrative functions such as marketing and back office operations.
- **Industrial symbiosis initiatives** that connect enterprises along the value chain.
- **Co-location of SMEs** to provide shared access to common tools, equipment, storage, and sales channels, reducing capital requirements for individual SMEs.
- **Virtual and physical market exchange platforms** to connect supply and demand and reduce inefficient transportation and storage.
- **Public facing marketing campaigns, exhibitions and applied projects** to shift market perceptions, build demand, and support emerging reuse markets (e.g., material salvage and reuse used for renovations and design).
- **Improved material accessibility for designers and contractors** by standardizing specifications and documentation to align with conventional virgin material products.

7.5 Information Sharing

Successful pilots and initiatives rely on strong collaboration and interaction across stakeholders, sectors, and the value chain. Convening stakeholders could advance wood circularity by reducing siloed working and duplication, leveraging best practices and strengthening coordination. Open sharing of knowledge, challenges, and opportunities across municipalities and industry makes it easier to identify gaps, build on existing work, and form new partnerships.

An example is hosting regional "Builders' Breakfast" style sessions with local builders and developers to introduce new policies, guidance, and approaches for improving wood recovery and reintegration. These sessions could be supported federally through national events and exhibits or integrated into existing conferences and industry events.

7.6 Research & Development

Research, development, and demonstration activities play an important role in advancing wood recovery and reintegration by improving material utilization, processing efficiency, and the development of new markets.

Key priorities include:

- **Research into secondary markets for different wood types and vintages**, recognizing that recovered wood can support multiple end-uses and value-added products (e.g., market research for Environment and Climate Change Canada by the Canadian Wood Council, *Expanding Secondary Market Opportunities for Recovered Construction, Renovation & Demolition (CRD) Wood)*.

- **Demonstration of novel sorting and processing technologies** that improve recovery rates, operational efficiency and material quality, such as automated nail/fastener detection and removal systems. As an example, the US based Urban Machine robotically salvages wood waste from construction and demolition sources. [39]
- **Validation of processing methods and product performance**, including testing approaches that support broader acceptance of reintegrated wood in construction and design applications.

7.7 Training and Skills Development

Training and skills development are essential to building a future-ready workforce and supporting the long-term growth of the wood recovery and reintegration sector. At the federal and regional levels, training programs can be delivered in partnership with technical institutes, industry training associations, and sector organizations to help address skills gaps across the value chain.

Key areas of focus include:

- **Targeted training programs** related to deconstruction, material grading, valuation and appraisal, manufacturing, and retail activities as part of a dedicated material recovery sector.
- **Leveraging existing skills from other sectors** and integrating 'circular training' into trades and professional programs to support broader adoption of circular wood practices. For example, the City of Portland's deconstruction program demonstrates how municipal regulations can support workforce development. In partnership with local and regional organizations, the City certifies local contractors and SMEs through a three-day *Build Reuse Project Management* training, combined with skills assessments and ongoing compliance requirements.[40]

7.8 Data Acquisition & Management

Effective data acquisition and management, combined with ongoing policy analysis, are essential to understanding market dynamics and driving SME growth in the sector.

Key areas of focus include:

- **Ongoing market mapping of the recovered wood value chain,** using a similar approach as virgin resources, including identification of key stakeholders and activities; assessment of business operating models (online, in-person, or hybrid); and analysis of the impacts of relevant policies, programs and funding measures.
- Improved **tracking of CRD wood material generation, volumes, quality, and flows,** applying the same robustness and consistency used to monitor virgin material supply chains.
- **Assessment of market perceptions,** including comparative demand for virgin versus salvaged wood, relative cost differences between virgin and reclaimed materials, and perceived value or strategic appeal of integrating reclaimed wood into business operations.

39 Urban Machine- The Company - Robotics & AI Company Salvaging Waste Wood - Urban Machine

40 City of Portland. Become a Certified Deconstruction Contractor | Portland.gov

8. Conclusion and Next Steps

8. Conclusion and Next Steps

The objectives of this project were to examine the current state of CRD wood recovery and reintegration in Canada by identifying SMEs involved in the generation, collection, processing, and end-uses of wood materials; understanding existing supply chains, business models, and areas of potential market growth; and highlighting the challenges and opportunities that may be supported or enhanced through policy interventions. This study provides an initial landscape of activity across Canada and identifies promising pathways for strengthening circularity from CRD wood materials.

It is acknowledged that the SMEs identified in this study do not represent the entire wood recovery and reintegration sector, and that gaps remain in understanding overall market dynamics. Continued development of the SME database, along with the identification of regional business directories and material exchange platforms, would improve market visibility and support more informed policy and program support. In addition, further research is recommended to explore the impacts of municipal and regional policy frameworks on market development and SME activity across Canada.

Appendices

Appendix A: SME List

The names of the SMEs identified in this study are outlined below, organized by province/territory.

For the purposes of this study, SMEs are defined as organizations that:

- Have fewer than 500 employees
- Are actively involved in wood recovery and reintegration through products or services
- Generate sales or service revenue
- Engage in value chain activities associated with higher value applications

ID	Company	City/Town
Alberta		
1	EcoRaze Solutions Ltd.	Red Deer
2	Habitat for Humanity ReStore: Calgary North	Calgary
3	Habitat for Humanity ReStore: Calgary South	Calgary
4	Habitat for Humanity ReStore: Camrose	Camrose
5	Habitat for Humanity ReStore: Edmonton North	Edmonton
6	Habitat for Humanity ReStore: Edmonton South	Edmonton
7	Habitat for Humanity ReStore: Edmonton West	Edmonton
8	Habitat for Humanity ReStore: Leduc	Leduc
9	Habitat for Humanity ReStore: Medicine Hat	Medicine Hat
10	Habitat for Humanity ReStore: Red Deer	Red Deer
11	Habitat for Humanity ReStore: Sherwood Park	Sherwood Park
12	Habitat for Humanity ReStore: St. Albert	St. Albert
13	Northmark Materials	Ardrossan
14	Priestly Demolition - Asset Recovery	King City
15	Rural Creative	Calgary
16	Salvage Solutions Ltd.	Pincher Creek
17	Urban Timber	Edmonton
British Columbia		
18	A Light Studio	Victoria
19	Alpha Select Productions Inc.	Mill Bay

20	Assertive Demolition Ltd.	Vancouver
21	Atelier Mohatri	Vancouver
22	Bouthouse Architect Inc.	West Vancouver
23	Calmura Natural Walls Inc.	Vancouver
24	Canadian Heritage Timber Company	Chilliwack
25	Chilliwack New & Used Building Materials	Chilliwack
26	Curewood	Vancouver
27	DalyCo	Vancouver
28	Deconstruction Demolition	Nanaimo
29	Demolition Impossible	Vancouver
30	DEMXX Deconstruction Inc.	Coombs
31	EcoWaste	Richmond
32	ETRO Construction Limited	Vancouver
33	Extraordinary League Contracting	Victoria
34	First Growth Reclaimed Design	Victoria
35	Good Old Wood (formerly Salvage Vancouver)	Vancouver
36	Green Coast Rubbish	North Vancouver
37	Habitat for Humanity ReStore: Abbotsford	Abbotsford
38	Habitat for Humanity ReStore: Burnaby	Burnaby
39	Habitat for Humanity ReStore: Campbell River	Campbell River
40	Habitat for Humanity ReStore: Castlegar	Castlegar
41	Habitat for Humanity ReStore: Chilliwack	Chilliwack
42	Habitat for Humanity ReStore: Courtenay	Courtenay
43	Habitat for Humanity ReStore: Grand Forks	Grand Forks
44	Habitat for Humanity ReStore: Kelowna	Kelowna
45	Habitat for Humanity ReStore: Kelowna West	Kelowna
46	Habitat for Humanity ReStore: Langley	Langley
47	Habitat for Humanity ReStore: Nanaimo	Nanaimo
48	Habitat for Humanity ReStore: Penticton	Penticton

49	Habitat for Humanity ReStore: Sechelt	Sechelt
50	Habitat for Humanity ReStore: Vernon	Vernon
51	Habitat for Humanity ReStore: Victoria	Victoria
52	Habitat for Humanity ReStore: Westshore	Langford
53	Hall it Up – Recycled Floors	Victoria
54	Hanson Land and Sea	Powell River, Sechelt
55	Hartland Landfill	Victoria
56	Intelligent City	Delta
57	International Timberframes Inc.	Donald
58	J&S Custom Furniture Co.	Vancouver
59	Keep it Green Recycling	Vancouver
60	Kiwi Innovations	Bowen Island
61	Lanefab Design/Build	Vancouver
62	Life Space Gardens	North Vancouver
63	Maple Ridge New and Used Building Materials	Maple Ridge
64	Measured Architecture	Vancouver
65	Michael Green Architecture Inc.	Vancouver
66	Napp Enterprises Ltd.	Prince George
67	Nexus Modular Construction	Cobble Hill
68	One of a Kind Creative Woodcrafting	Parksville
69	Prime Habitat Design Build	Kelowna
70	Progressive Environmental	Nanaimo
71	Squamish ReBuild	Squamish
72	Sticks & Stones Furniture	Squamish
73	Syd's Demo & Salvage	Shawnigan Lake
74	The Reuse People of Canada Malahat Industrial Park	Vancouver Island
75	Thuja Wood Art	Pender Island
76	Urban Repurpose	North Vancouver
77	UrbanJacks	Vancouver

78	Valkyrie	Vancouver
79	VEMA Deconstruction	Vancouver
80	Westcoast Island Woodwork	Lantzville
81	Western Reclaimed Timber	Maple Ridge
82	Woodshop Co-op Workers	Vancouver
Manitoba		
83	204 Demolition & Salvage Ltd.	Winnipeg
84	Habitat for Humanity ReStore: Brandon	Brandon
85	Habitat for Humanity ReStore: Winnipeg East	Winnipeg
86	Habitat for Humanity ReStore: Winnipeg North	Winnipeg
87	Prairie Barnwood	Morden
88	The Den	Pierson
89	The Old House Revival Company	Winnipeg
New Brunswick		
90	Habitat for Humanity Restore: Fredericton	Fredericton
91	Habitat for Humanity ReStore: Miramichi	Miramichi
92	Habitat for Humanity Restore: Moncton	Moncton
93	Habitat for Humanity Restore: Saint John	Saint John
Newfoundland and Labrador		
94	Habitat for Humanity ReStore: St. John's	St. John's
95	Vintage Salvager	St. John's
Nova Scotia		
96	Full Circle Wood Products	Halifax
97	Graff Brothers Salvage Company	St. Bernard (Digby Co.)
98	Habitat for Humanity ReStore: Darthmouth	Dartmouth
99	Habitat for Humanity ReStore: New Glasgow	New Glasgow
100	Onslow Historic Lumber Co.	Truro
101	Renovators Resource Inc.	Lunenburg
102	Timberhart Woodworks	Hantsport
103	Wilf's Demolition & Salvage Ltd	Louisdale

Northwest Territories		
104	Habitat for Humanity ReStore: Yellowknife	Yellowknife
Ontario		
105	Antique Lumber	Newtonville
106	Barnboardstore	Toronto & Hamilton
107	Century Wood Products Inc.	Fergus
108	CoolEarth	Toronto
109	Daniel Gruetter Design	Toronto
110	Deadstok Muskoka	Muskoka
111	Desire Line Design	Hamilton
112	Earth Angel	Toronto
113	Forever Interiors	Toronto
114	Goosen Inc.	Kitchener
115	Habitat for Humanity ReStore: Adelaide	London
116	Habitat for Humanity ReStore: Alliston	Alliston
117	Habitat for Humanity ReStore: Barrie	Barrie
118	Habitat for Humanity ReStore: Belleville	Belleville
119	Habitat for Humanity ReStore: Bracebridge	Bracebridge
120	Habitat for Humanity ReStore: Brampton	Brampton
121	Habitat for Humanity ReStore: Brantford	Brantford
122	Habitat for Humanity Restore: Brockville	Brockville
123	Habitat for Humanity ReStore: Burlington	Burlington
124	Habitat for Humanity ReStore: Cambridge	Cambridge
125	Habitat for Humanity Restore: Chatham	Chatham
126	Habitat for Humanity ReStore: Cobourg	Cobourg
127	Habitat for Humanity ReStore: Collingwood	Collingwood
128	Habitat for Humanity Restore: Cornwall	Cornwall
129	Habitat for Humanity ReStore: East York	Toronto
130	Habitat for Humanity ReStore: Etobicoke	Toronto
131	Habitat for Humanity ReStore: Fergus	Fergus

132	Habitat for Humanity ReStore: Fonthill	Fonthill
133	Habitat for Humanity ReStore: Goderich	Goderich
134	Habitat for Humanity ReStore: Grimsby	Grimsby
135	Habitat for Humanity ReStore: Guelph	Guelph
136	Habitat for Humanity ReStore: Hamilton	Hamilton
137	Habitat for Humanity ReStore: Hanover	Hanover
138	Habitat for Humanity ReStore: Huntsville	Huntsville
139	Habitat for Humanity ReStore: Kemptville	Kemptville
140	Habitat for Humanity ReStore: Kingston	Kingston
141	Habitat for Humanity ReStore: Lindsay	Lindsay
142	Habitat for Humanity ReStore: London North	London
143	Habitat for Humanity ReStore: Midland	Midland
144	Habitat for Humanity ReStore: Milton	Milton
145	Habitat for Humanity ReStore: Mississauga	Mississauga
146	Habitat for Humanity ReStore: Newmarket	Newmarket
147	Habitat for Humanity ReStore: North York	Toronto
148	Habitat for Humanity ReStore: Orangeville	Orangeville
149	Habitat for Humanity ReStore: Orillia	Orillia
150	Habitat for Humanity ReStore: Oshawa	Oshawa
151	Habitat for Humanity ReStore: Ottawa City Centre	Ottawa
152	Habitat for Humanity Restore: Ottawa Stittsville	Ottawa
153	Habitat for Humanity Restore: Ottawa Trainyards	Ottawa
154	Habitat for Humanity ReStore: Owen Sound	Owen Sound
155	Habitat for Humanity ReStore: Peterborough	Peterborough
156	Habitat for Humanity ReStore: Port Elgin	Port Elgin
157	Habitat for Humanity ReStore: Sarnia	Sarnia
158	Habitat for Humanity ReStore: Sault Ste. Marie	Sault Ste. Marie
159	Habitat for Humanity ReStore: Scarborough	Scarborough
160	Habitat for Humanity ReStore: St. Catharines	St. Catharines

161	Habitat for Humanity ReStore: St. Thomas	St. Thomas
162	Habitat for Humanity ReStore: Stone Church Road	Hamilton
163	Habitat for Humanity ReStore: Stratford	Stratford
164	Habitat for Humanity ReStore: Sudbury	Sudbury
165	Habitat for Humanity ReStore: Thunder Bay	Thunder Bay
166	Habitat for Humanity ReStore: Trenton	Quinte West
167	Habitat for Humanity ReStore: Vaughan	Vaughan
168	Habitat for Humanity ReStore: Waterloo	Waterloo
169	Habitat for Humanity ReStore: Windsor	Windsor
170	Habitat for Humanity ReStore: Wingham	Wingham
171	Habitat for Humanity ReStore: Woodstock	Woodstock
172	HD Threshing	Cambridge
173	Historic House Salvage	Warkworth
174	Historic Lumber	Acton
175	Huron Creek Developments	Kitchener
176	Joel Galenkamp	Hamilton
177	Junk Whisperer	Leamington
178	Lubo Design	Toronto
179	Nexcem Build	Burlington
180	Northern Wide Plank	Schomberg
181	Nostalgic Wood	Walton
182	Old Wood Salvage	Welland
183	Ouroboros Deconstruction	Toronto
184	Plural Projects	Toronto
185	Poor Man's Oak	Toronto
186	Re4m Design and Fabrication Inc.	Ottawa
187	Revival Flooring	Huntsville
188	Rockside Campbell Design	Duntroon
189	Rustic Restorations	Wainfleet

190	The REAL Deal Reuse Store - Rideau Environmental Action League	Smiths Falls
191	Timbercraft Barn Board & Reclaimed Wood	Brussels
192	Timeless Material Company	Waterloo & Durham
193	Tomilinson Group	Ottawa
194	TRY Recycling	London
195	Wiedehopf	Concord
196	Wood Rescue	Waterloo
197	Wood Source	Ottawa
198	Woodshed Lumber	Smithville
Prince Edward Island		
199	Birdmouse	Cardigan & Fortune Bridge
200	BMD Project & Construction Management — Demolition & Deconstruction	Charlottetown
201	Habitat for Humanity Restore: Charlottetown	Charlottetown
202	Reclaimed PEI	Murray River
203	Robias Wood	New Perth & Cardigan
Quebec		
204	Atelier La Patente - La Recyclerie	Québec City
205	Atelier Morel Leroux	Saint-Léonard
206	Au Plaisir Atelier	Montréal
207	Baldwin - récupération de vieux bois	Estrie
208	Bois Public	Montréal
209	Bois Urbain	Montréal
210	BP Smartcore	LaSalle
211	BRQ Fibre et Broyure	Trois-Rivières
212	CDTT Épursol - ÉCO Centre de l'Ange-Gardien	Gatineau
213	Centre de Tri et de Revalorisation des Matériaux Secs de l'Outaouais	Gatineau

214	Centre FilloGreen	Gatineau
215	Construction Nazar	Montréal
216	Écomatériaux Désourdy	Bromont
217	Ecoplast	Farnham
218	Ecoscéno	Montréal
219	FiberWood	Bois-des-Filion
220	Habitat for Humanity Restore: Montreal	Montréal
221	Habitat for Humanity Restore: Montreal North	Montréal
222	Idea Construction	Montréal
223	Karine Touzel Atelier	Longueil
224	La Remise – centre de réemploi	Montréal
225	La Remise Culturelle	Québec City
226	Legacy Vintage – Antique & Vintage Building Parts	Québec City
227	Matériaux Récupérés de Portneuf	Saint-Casimir
228	Mercier40	Champlain
229	Moment Factory	Montréal
230	Mr. Barn Wood	Montréal
231	MSL Fiber	Louiseville
232	MultiRecycle	Montréal
233	NewTechWood	Ville Saint-Laurent
234	Ottawa Valley Waste Recovery Centre	Gatineau
235	Quincaillerie R+ (Réemploi+)	Alma
236	RÉCO Centre de réemploi	Montréal
237	Recyc-Antique	Cowansville
238	Ré-Utiles	Îles-de-la-Madeleine
239	Slabica	Sherbrooke
240	Tafisa: Rewood	Lac-Mégantic
241	Twenifor	Mashteuiatsh
242	Valley Barn Board	Gatineau

243	Veser Antique Woods	St. Cyprien-de-Napierville
Saskatchewan		
244	ABMT Wood Solutions	Saskatoon
245	Habitat for Humanity ReStore: Prince Albert	Prince Albert
246	Habitat for Humanity ReStore: Regina	Regina
247	Habitat for Humanity ReStore: Saskatoon	Saskatoon
248	Kannwood Timberworks	Regina
249	Last Mountain Timber	Buena Vista
250	ReRoute	Saskatoon
Yukon		
251	Imperfect Wood Carving	Whitehorse
252	Klondike Dredge Wood	Klondike region

Appendix B: Engagement Summary

This market research involved multiple engagement touchpoints, including targeted interviews, surveys, and presentations, to engage key stakeholders and SMEs active in wood recovery and reintegration.

Interviews

A total of 16 interviews were conducted with enablers and brokers operating within the CRD wood recovery ecosystem. Enablers support market development and serve as industry knowledge-sharing or networking platforms (e.g., industry associations, research institutions). Brokers facilitate transactions involving recovered wood and reintegrated wood products and are therefore connected to a broad range of SMEs.

These entities were not included in the SME list or quantitative analysis (Section 5) but contributed valuable sector knowledge that informed identification of SMEs and provided insights reflected in Section 6.

Unlike the other interviewees listed below, VEMA Deconstruction is an SME and was included in the 252 identified SMEs.

The following organizations were interviewed:

3. Ancore Appraisers
4. Association des professionnels de la construction et de l'habitation du Québec
5. Builders for Climate Action
6. Concordia University
7. Cycle Momentum
8. Department of Wood Science (University of British Columbia)
9. Forest Stewardship Council (FSC)
10. Forestry Innovation Investment
11. FP Innovations
12. Northmark Materials
13. The Wood Innovation Group
14. Centre for Advanced Wood Processing (University of British Columbia)
15. University of Alberta
16. VEMA Deconstruction
17. Wood Science & Technology Centre (University of New Brunswick)
18. Wood Science Testing Laboratory (Lakehead University)

Survey

An online survey was administered to entities identified in the database as being involved in the Canadian market for reclaimed wood from construction, renovation, and demolition (CRD) activities. The purpose of the survey was to build the database with SMEs active in wood recovery and reintegration.

The survey was designed to take less than seven minutes to complete and focused on business activities, market participation, and involvement in CRD wood recovery.

Key details are summarized below:

- The online survey was administered between November 2025 and January 2026.
- The survey was distributed to 515 organizations, with 46 completed responses received, representing an 8.9% response rate.

Internal Presentation of Report Findings

A virtual webinar was presented by Light House and included an overview of the research findings, followed by a Q&A session facilitated by Environment and Climate Change Canada (ECCC).

The webinar was delivered to practitioners from government, industry, nonprofit, and standards organizations. The session was attended by 78 participants, reflecting strong cross-sector interest.

Appendix C: Survey Questions

The following questions were included in a survey distributed to entities identified as enablers, brokers, and SMEs. Where possible, data gaps were addressed through secondary research. The questions were used to inform Section 5: Market and Ecosystem Overview and are organized by the availability of data: sufficient data, partial data, or limited usable data.

Sufficient Data

1. Is your organization directly involved in the use of reclaimed wood?
2. Would you be interested in integrating reclaimed wood into your business model?
3. Which sector best describes your organization?
4. What province(s) or territory(ies) do you operate in? *(options were provided)*
5. Which sector best describes your organization?

Partial Data

6. Which business type best describes your organization?
7. Which process stage best describes your organization involvement with reclaimed wood?
8. What products do you make with reclaimed wood? *(options were provided)*
9. How many employees does your business have?
10. What is your organization's gross annual revenue?
11. What stage of development is your organization at?

Limited Usable Data

12. What type of reclaimed wood material do you use as inputs? *(options were provided)*
13. Where do you source your reclaimed wood inputs from? *(options were provided)*
14. What is the geographic origin of your reclaimed wood inputs?
15. Do you have plans to expand in any of the following areas? *(options were provided)*