

COVID-19 Pandemic Impacts on Canadian Wood Pellet Production and Feedstock Supply (April 2021 Update)

In September 2020, your company was asked to complete a survey about the impact of the COVID-19 pandemic on Canadian wood pellet producers. This short survey is intended to follow up on the information previously gathered, focusing on the impacts to your company during the second and third waves of the pandemic beginning October 2020, extending to April 2021. Companies are asked what has happened to their mills feedstock supply and wood pellets production since October 2020 and what their company projects for the mid-term future. Please use the unique link to complete the survey as it is associated with your individual company/mill. Thank you for your participation in this process.

Feedstock (wood fibre) supply

1. Between the start of the second COVID-19 wave in October 2020 and the end of April 2021, feedstock prices for my mill have:

- Significantly decreased (more than 20%) compared to the prices between March and September 2020
- Moderately decreased (between 5% and 20%) compared to the prices between March and September 2020
- Remained about the same ($\pm 5\%$) compared to the prices between March and September 2020
- Moderately increased (between 5% and 20%) compared to the prices between March and September 2020
- Significantly increased (more than 20%) compared to the prices between March and September 2020

2. Between the start of the second COVID-19 wave in October 2020 and the end of April 2021, the feedstock mix for my mill:

- Remained the same as between March and September 2020
- Includes more non-sawmill residues (e.g. roundwood, harvest residues) than between March and September 2020
- Includes less non-sawmill residues (e.g. roundwood, harvest residues), so more sawmill residues, than between March and September 2020
- Do not know / unsure

3. Please explain the reason for the change in amount of non-sawmill residues used at your mill.

4. Between the start of the second COVID-19 wave in October 2020 and the end of April 2021, the overall availability of feedstock for my mill:

Remained the same

Increased

Decreased

Do not know / unsure

5. Once the COVID-19 pandemic is under control in Canada and people can return to a normal life (planned for late 2021 or early 2022 at the moment), the feedstock mix for my mill is expected to:

Return to what it was prior to the COVID-19 pandemic

Change (either include more or less sawmill residues) because of the repercussions of the COVID-19 pandemic

Change (either include more or less sawmill residues) because of reasons unrelated to the COVID-19 pandemic

Do not know / unsure

Transport logistics

6. Has transportation of material inputs or finished products at your mill been disrupted between the start of the second COVID-19 wave in October 2020 and the end of April 2021?

Yes

No

Do not know / unsure

7. If applicable, which aspects of transporting material inputs or finished products has been disrupted? (Please select all that apply)

Transporting feedstocks into my facility

Transporting other inputs into my facility

Transporting wood pellets out from my facility to bulk storage / port

Transporting wood pellets out of the bulk storage / port to the final destination

Other (please describe)

8. Between the start of the second COVID-19 wave in October 2020 and end of April 2021, the access to transportation services for shipping raw materials: (Please indicate any further changes observed since the previous survey).

- Remained the same as before the COVID-19 pandemic
- Improved, but not enough to go back to what it was before the COVID-19 pandemic
- Improved, and is now the same as what it was before the COVID-19 pandemic
- Improved, and is even better than before the COVID-19 pandemic
- Worsened, even further than the situation between March and September 2020
- Do not know / unsure

9. Between the start of the second COVID-19 wave in October 2020 and the end of April 2021, the access to transportation services for shipping finished products: (Please indicate any further changes observed since the previous survey).

- Remained the same, as during the first wave and before the COVID-19 pandemic
- Improved, but not enough to go back to what it was before the COVID-19 pandemic
- Improved, and is now the same as what it was before the COVID-19 pandemic
- Improved, and is even better than before the COVID-19 pandemic
- Worsened, even further than the situation between March and September 2020
- Do not know / unsure

Operations

10. Has your mill experienced any COVID-19 related labour shortages between the start of the second COVID-19 wave in October 2020 and the end of April 2021?

- No
- Yes (please describe)

11. Between the start of the second COVID-19 wave in October 2020 and the end of April 2021, did your mill have to close?

- No
- Yes

12. For how long did your mill close over that period (October 2020 to April 2021)?

- Less than 1 week
- 1 to 4 weeks
- 5 to 10 weeks
- More than 10 weeks
- Do not know / uncertain

13. Between the start of the second COVID-19 wave in October 2020 and the end of April 2021, has your mill experienced a change in production compared to normal levels for that time of year (either decrease or increase)?

- Yes, decrease in production
- Yes, increase in production
- No

14. Please estimate the percentage in change in the overall wood pellet production from October 2020 to the end of April 2021 (100% reduction corresponding to complete closure over the entire period and 100% increase corresponding to a doubling in production over the entire period).

15. Why was there a change in production levels? (Please select all that apply)

- Due to lockdown measures
- Because of labour shortages
- Because of declining end-use demand
- Because of increasing end-use demand
- Other (please specify)

16. How did your mill adapt in their operations for COVID-19 between the start of the second wave in October 2020 and the end of April 2021? (Please indicate measures that were maintained or implemented since previous survey, and select all that apply).

- No changes
- Additional health and safety measures (e.g., personal protective equipment, cleaning of work areas and surfaces)
- Reorganized staffing levels because of social distancing requirements or other reasons
- Investment in equipment or machinery to replace labour
- Other (please describe)

Government Support

17. Between the start of the second COVID-19 wave in October 2020, and the end of April 2021, what additional support (since the previous survey) has been sought from the federal government? (Please check all that apply).

Wage subsidies

Subsidies to cover additional costs incurred because of COVID-19

Deferral of income taxes or sales tax

Access to credit through loans, loan guarantees or emergency financing

None

Other (please specify)

18. Between the start of the second COVID-19 wave in October 2020, and the end of April 2021, what additional support (since the previous survey) has been sought from the provincial government? (Please check all that apply).

Wage subsidies

Subsidies to cover additional costs incurred because of COVID-19

Deferral of income taxes or sales tax

Access to credit through loans, loan guarantees or emergency financing

None

Other (please specify)

Pellet types and contracts

19. Confirm that the type of wood pellet your mill mainly produces has not changed since you answered the first survey in September 2020:

Industrial pellets (power generation)

Heating pellets (stoves and boilers)

Both types in relatively equal proportions

20. Confirm that the type of contract your company mostly fulfills has not changed since you answered the first survey in September 2020:

- Short term
- Long-term
- Mix of both
- Other (please specify)

Overall impact of COVID-19 pandemic

21. What was the overall impact of the COVID-19 pandemic on your mill's profitability for the entire period between March 2020 and April 2021?

- Significantly decreased (more than 20%)
- Moderately decreased (between 5% and 20%)
- Remained about the same ($\pm 5\%$)
- Moderately increased (between 5% and 20%)
- Significantly increased (more than 20%)

22. What was the overall impact on your mill of the COVID-19 pandemic (March 2020 to April 2021), taking into account all relevant factors such as feedstock, labour, transportation and government support.

	1st wave	2nd and 3rd wave
Strong negative impact		
Strong negative impact		
Small or no impact		
Moderate positive impact		
Strong positive impact		

23. Please explain any difference that you experienced between the first wave (March to June 2020) and the second and third wave (October 2020 to April 2021).