



BRITISH COLUMBIA'S ENVIRONMENTAL SECTOR

The British Columbia environmental industry includes over 1,300 companies with revenues close to \$2 billion. The main components of the sector are environmental construction, recycling, and solid and hazardous waste management, consulting services, water and wastewater goods and services, renewable energy, air pollution and noise control, analytical services, and green building and sustainable urban planning.

The largest sub-sectors - environmental construction, recycling, and solid waste management account for most of the industry's revenues. The export oriented sub-sector reported revenues of around \$600 million in 2002 and \$175 million in export sales, an indication of its relatively small size. This sub-sector consists of two very distinct, but interdependent, areas:

- A predominantly high technology component ("technology component"), comprised mainly of small, young (less than five years old) B.C. firms producing goods and services in a growing and evolving industry. This component is highly fragmented and serves diverse clients, accounting for about two-thirds of the export-oriented sector.
- An environment-related consulting engineering, R&D and related services component ("engineering services component"), which accounts for the remaining one third of the sector.

In British Columbia and elsewhere in Canada, the environmental sector is undergoing a process of re-orientation and renewal. The waning focus on pollution prevention at source not only is decreasing the demand for traditional and often more expensive end-of-pipe pollution control technologies, it is spurring more energy-efficient and cleaner technologies for application in the primary resource, manufacturing, energy and service sectors.

Climate change and the search for more energy efficient technologies to reduce greenhouse gas (GHG) emissions is forcing the sector to redefine itself and to form new alliances and partnerships with governments and academia focused more broadly on sustainability. The drivers of the transformation process are as diverse as the client base of the industry itself. Changing environmental management practices in the private sector, new approaches to public policy making with respect to environmental protection, and shifting economic forces globally are helping to reshape the sector.

AREAS OF STRENGTH

Alternative Energy Systems and Associated Technologies

Fuel Cells and Clean Fuel Technologies
Small Scale Hydro
Biomass Co-generation Systems

Urban Environmental Management Systems
Contaminated Site Remediation Brownfield Reclamation
Green Building Design

Planning for Sustainable Communities and Integrated Environmental Solutions

Urban Environmental Management Systems

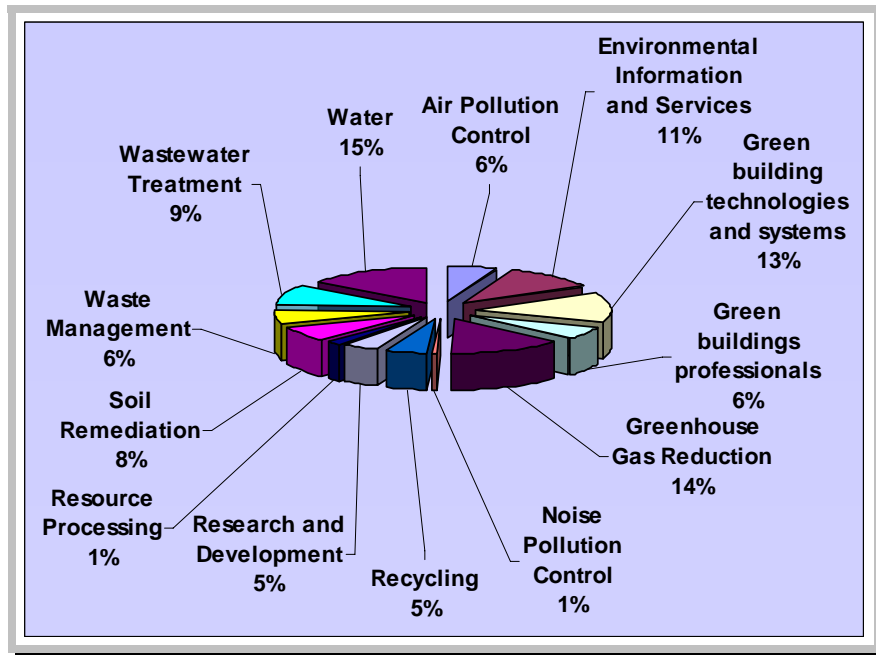
Water/Wastewater Technologies Services and Solutions

No longer focused on "end-of-pipe" solutions to treat pollutants released into the air, water or soil, the sector is evolving into a complex and rapidly changing constellation of engineering, analytical and design services designed to help businesses incorporate environmental considerations into their production processes and in their dealings with client communities and customers.

The sector is closely linked to organizations involved in sustainable community development; green building design and construction; energy efficiency and eco-industrial networking; sustainable urban infrastructure; and sustainable resource management.

The sector has traditionally drawn strength from its domestic client base. However, in recent years, opportunities in the export market have become more enticing, a reflection not only of the increasing globalization of the sector but also of Canada's growing international reputation for quality technological and environmental expertise, particularly related to water and wastewater treatment, liquid and solid waste management, environmental instrumentation and analysis, energy efficiency and renewable energy, and engineering and consulting services.

BC Environment Industry by Sector



While the industry in BC remains small, it has the capability to compete in the international environmental market. The experience of a number of BC high technology firms shows that small firms can become larger and world leaders in their niches with the right combination of technology, financing, and market development support. Growing concern over climate change has prompted the emergence of new industries serving both domestic and international markets capable of delivering fully functional, integrated solutions to environmental challenges.

British Columbia environment companies have strong capabilities in the areas of Water/wastewater goods and services, air pollution control, environmental monitoring and instrumentation, clean technologies, renewable energy, environmental consulting, as well as solid waste management and potable water supply systems and retrofits.



BRITISH COLUMBIA ENVIRONMENT INDUSTRY ASSOCIATION

c/o of the GLOBE Foundation of Canada,
 Suite 578 - 999 Canada Place
 Vancouver, B.C., Canada V6C 3E1
 T: +1.604.683.2751 F: +1.604.677.5960
www.bceia.com