

Non-Timber Forest Products, Tourism, and Small Scale Forestry

Income Opportunities and Constraints



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Ministry of Forests and Range
Forest Science Program



Centre for Non-Timber Resources

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Darcy A. Mitchell



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FOREWORD

The British Columbia Inter-agency Non-timber Forest Resources (IANTFR) Committee was established in January 2006 to facilitate a co-ordinated approach to non-timber forest resource management in the province. The Ministry of Forests and Range and Ministry of Agriculture and Lands co-chair the IANTFR Committee. Other government partners include or have included what are now the Ministry of Small Business, Technology and Economic Development, the Ministry of Aboriginal Relations and Reconciliation, and the Ministry of Community and Rural Development (names of some Ministries have changed since 2006). Representatives from the First Nations Forestry Council and the First Nations Mountain Pine Beetle Initiative have participated in committee meetings. The Centre for Non-Timber Resources at Royal Roads University provides expert advice and support services to the Committee. The Ministry of Forest and Range also contributes to the Committee by providing staff time and expertise, and resources to produce publications.

The goals of the Committee are (1) to improve communication and co-ordination across the provincial government, and (2) to advise government on issues related to non-timber forest resource management in British Columbia. The IANTFR Committee members have produced a communication strategy that includes the production of publications designed to improve awareness about non-timber forest resources so that they are managed appropriately.

A series of Land Management Handbooks on this theme are being co-published by the Ministry of Forests and Range and the Centre for Non-Timber Resources at Royal Roads University:

- **Understanding Non-timber Forest Products Activity on the Land Base** by Gerrard Olivotto (LMH 62)
- **Non-timber Forest Products, Tourism, and Small-scale Forestry: Income Opportunities and Constraints** by Darcy Mitchell (LMH 63)
- **Compatible Management of Timber and Pine Mushrooms** by Shannon Berch and Marty Krabetter (LMH 64)
- **Non-timber Forest Product Development in British Columbia's Community Forests and Small Woodlands: Constraints and Potential Solutions** by Emily Jane Davis
- **Managed Access to Non-timber Forest Products on Private Land and Eligible Tenures** by Wendy Cocksedge, Emily Keller, Art Mercer, and Grace Wang
- **Creating a Regional Profile for Non-timber Forest Products** by Wendy Cocksedge, Tom Hobby, Kathi Zimmerman, Dan Adamson, Russell Collier, and Emily Keller
- **What about the Berries? Managing for Understorey Species** by Wendy Cocksedge and Michael Keefer

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1 INTRODUCTION

Compatible management is the practice of managing forests for both timber and non-timber values, including non-timber forest products (NTFPs) (Titus et al. 2004). This series of guidebooks developed out of a survey conducted in 2006, in which a wide range of participants in the forestry sector provided their views on the opportunities for, and barriers to, compatible management (Cocksedge et al., in press). Incorporating NTFPs within forest management can provide social, ecological, and financial benefits for land managers and the surrounding communities and ecosystems. The purpose of the guidebook series is to provide a concise overview of the key issues and concerns for each topic, and to suggest resources that can help forest managers overcome some of the barriers to the compatible management they have identified.

This guide provides suggestions for an initial assessment of whether, and how, tourism services combined with NTFPs may provide a more marketable “package” than products alone. Forest owners and managers who are interested in further pursuing approaches to NTFP-based tourism should consult Cowper (in press).

2 FORESTS AND NON-TIMBER VALUES

Management objectives for forests in British Columbia protect, either directly or indirectly, many non-timber values, including those that are critical to the province’s second largest industry—tourism. These values include old-growth areas, visual objectives, biodiversity, wildlife, riparian zones, and cultural values. Forest operations generate benefits for recreation and tourism, and for NTFPs such as berries, mushrooms, and floral greenery (access by forestry roads, for example), as well as actual and potential problems (such as large-scale salvage logging of areas affected by the mountain pine beetle) (Council of Tourism Associations of BC 2009). While forest management that protects multiple values and generates greater overall returns from the resource

1.1 Who should read this guide?

- Private forest landowners, holders of woodlot tenures, First Nations, municipalities, and other holders of small forest tenures, especially forest lands located close to urban centres or other sources of domestic and international visitors. It is particularly relevant to forest owners who are engaged in both forestry and agricultural enterprises.
- Forestry students

1.2 Contents of this guide

- A discussion of what makes non-timber goods and services marketable products
- Some examples of business opportunities available from marketing of specialized or complementary NTFPs and services
- Barriers to forest owners and managers in realizing income opportunities from marketing NTFPs and tourism services
- A checklist of questions to assess whether NTFPs and tourism offer good opportunities to forest owners and managers
- Examples and additional resources with website links

undoubtedly benefits the province as a whole, many, or perhaps most, forest managers or owners are unable to capture these non-timber financial benefits because:

- there are no markets for the goods or services;
- forest owners are unable to access or create viable markets; and/or
- in the absence of markets, forest owners are not otherwise compensated adequately (or at all) for non-timber benefits they provide to society, such as views, recreational opportunities, clean water, wildlife, “free” foods, or ornamental plants.

This guide does not address issues of public payment for production of non-timber goods and services, but discusses only opportunities for

converting unpriced (free) goods and services into marketable products that can generate income for forest owners and managers.

3 WHAT MAKES A MARKETABLE PRODUCT?

In order for a good or service to be marketable, two conditions must be in place:

- The good or service must be “scarce” in economic terms. That is, there must not be such an abundance of supply relative to demand that no one is willing to pay for the good or service; and
- It must be possible to exclude people from taking the good or service for free. It is important to note that owners may have a legal right to exclude others from the good or service, but it may be too difficult or too expensive to do so.

Many non-timber goods and services do not meet these criteria as marketable products (Merlo et al. 2000). For example, if there are hundreds of kilo-

metres of hiking trails where people can walk, they are unlikely to pay for the right to walk on a particular section of equally attractive trail. Even if people would pay to walk on a trail, because it is especially scenic for example, the “product” is not marketable if the owner of the trail cannot effectively stop people from entering for free. Similarly, if there are many areas where people can pick berries or mushrooms free of charge, it will be difficult to charge for access to a particular picking area. Therefore, in order for a forest owner to be able to sell goods and services, he or she must find ways to meet criteria of scarcity and excludability. Studies in Europe (Merlo et al. 2000) suggest that problems with excludability are often the most important difficulties that need to be overcome.

4 FORESTS AS JOBS OR LIVELIHOODS

Forest landowners and tenure holders in British Columbia are mainly in the business of logging. While large landowners may convert forest lands to other uses, including tourism uses such as ski resorts, it is unlikely that many large forest operators are, or will be, in the business of tourism or non-timber forest products, or both.

Small forest landowners and holders of small tenures, including woodlot and community forest tenures, may be more likely to seek ways of generating income from a wider range of forest resources, particularly if they have sufficiently secure tenure rights to justify the investment of financial and human resources. Although there is no comprehensive research on the interests or intentions of all small forest owners and tenure holders, a survey by the Federation of British Columbia Woodlot Associations in 2003 found that 15% of respondents produced (intentionally or as a by-product of other

activities) a range of “agroforestry products” such as mushrooms, salal, berries, or silvo-pasture. The same survey found that 23% of respondents generated tourism and amenity services, such as tours, bed and breakfast operations, trails for mountain biking, cross country skiing, and horseback riding (cited in Ambus et al. 2007). The same survey found that most respondents did not rely on woodlots as their sole source of income; most used woodlots to supplement other employment income or income from agricultural operations. These results suggest that some owners or tenure holders of small-scale forestry operations have experience with non-timber goods and services, and likely have a wide range of other skills, knowledge, and experience outside the timber sector. This further suggests a willingness (and/or need) to consider forestry management as an element of a “livelihood strategy” as opposed to a regular, full-time job.

5 BEYOND COMMODITIES: THE EXAMPLE OF AGRICULTURE

The long-standing and worsening problems facing the forest industry in British Columbia are well known and the need for diversification and a greater range of value-added products is well recognized (Kozak and Maness 2005). The agricultural sector, especially smaller farming operations, have experienced similar economic and social conditions, including increased global competition, falling commodity prices, and capital- and technology-intensive production, all of which have led to larger and more capital-intensive farming operations squeezing out the family farm (Che et al. 2005). In British Columbia, as in other parts of Canada and the world, many small farmers have responded to these changing conditions by shifting away from commodity production and moving toward a consumer orientation through the sale of specialized or value-added goods and services, including direct farm marketing and “agritourism.”

The British Columbia government has supported agritourism and direct farm marketing in several

ways (British Columbia Ministry of Agriculture, Food and Fisheries 2009) and has more recently extended support to the development of “agroforestry” in the province. The chief distinction between these sectors and the conventional NTFP sector is that direct farm marketing, agritourism, and (most) agroforestry take place on private lands, where the owner has the incentive to invest in these activities because the investment is protected by property rights. Forest owners and tenure holders can learn a good deal from experience in the small farm sector, especially if they are already engaged in agricultural activities on a private land base. However, in most cases, the absence of clear property rights in NTFPs is a fundamental limitation to replicating developments in agriculture.

Entrepreneurial skills, especially marketing, are also a major challenge in shifting from a commodity to a consumer orientation. The first question to be asked is not “What can I produce?” but “What can I sell?”

6 OPPORTUNITIES FOR NON-TIMBER FOREST PRODUCTS AND TOURISM PRODUCTS

The following information, adapted from Cowper (in press), offers a number of suggestions to help move

NTFPs from a commodity basis to a specialized good or tourism service.

Examples of Non-timber Forest Product-related Tourism Opportunities

Product-based

- for gift shops (e.g., wild foods, crafts, cultural items such as drums)
- for restaurants (e.g., specialized sauces, condiments, preserves and other wild food products)
- for local stores, bed and breakfast operations, tour companies (e.g., foodstuffs, soaps, decorative items)
- for spas (e.g., salves, essential oils)

Educational

Craft-based

- using forest botanicals for salves
 - making honey and beeswax candles
 - building bird houses
 - making wreath or swags
 - creating moss art (e.g., picture frames, table decorations)
 - producing dried floral arrangements
-

Examples of Non-timber Forest Product-related Tourism Opportunities (continued)

Educational (continued)

Culinary

- cooking workshops focussing on morels, chanterelles, wild berries, etc.
 - walks (e.g., “Wild Foods” or “Wild Grocery Walk”) and collection/preparation
 - preserving methods
-

Interpretive—guided or self-guided

- native plant tours
 - nature walks (e.g., forest, shore, alpine, desert)
 - forest ecology tours
 - mushrooms (collection/identification)
 - wildlife tours
-

Cultural

- First Nations historical use of an area
 - ethnobotany (the study of human uses of plants)
 - culturally modified trees
 - canoe and drum making
 - harvesting/resource management
 - cooking practices
-

Other

- food festivals
 - craft shows (e.g., Christmas, floral, carving)
-

Many of these opportunities are similar to those that are common in the agritourism, ecotourism, or cultural tourism sectors; (for more ideas, see Appendix 1 Additional Resources). Each of these suggestions requires either that a product be moved closer to the consumer (by adding value to it through

processing or packaging), that the product be differentiated from other similar products (wild, fresh from the forest, etc.), or that the product be coupled with an experience that consumers want (the chance to learn a new skill, for example). The addition of the experience is what creates the “tourism” value.

7 EVALUATING OPPORTUNITIES FOR NON-TIMBER FOREST PRODUCTS AND TOURISM PRODUCTS: AN INITIAL FEASIBILITY ASSESSMENT

Forest owners and tenure holders should consider the following questions before deciding whether, and how, to develop NTFP-tourism products. These questions are intended only as an initial assessment of feasibility; entrepreneurs will need to consider business opportunities and challenges in much more detail. Appendix 1 Additional Resources provides a starting point for exploration of NTFP-based tourism possibilities.

7.1 Is there a market?

The question “Is there a market?” asks not only whether the product can be sold, but whether it can

be sold in a market that is accessible to the seller, at a price and in a quantity that will make a profit. For example, there may be an excellent market for gourmet wild food dinners in Vancouver; however, if the seller lives in a small community several hundred kilometres from Vancouver, it is unlikely that they will be able to tap this market unless there is another source of appropriate consumers near them (for example, a major resort). There are few new ideas in the world; the forest owner or tenure holder should spend some time seeing what others are doing and whether they are able and willing to produce similar products.

7.2 Demand versus supply—Is it also available for free?

If wild berries, cedar boughs, or other wild products are common in the area, the chances of selling these products or selling access to them (e.g., pick your own wild berries) is clearly limited unless the prospective customers value their time more highly than the cost of the product. In such a case, the seller must either find a market where similar products are less abundant, or add something to the product that is not freely available. This “something” can be some physical change (such as processing or packaging), or the provision of facilities that enhance consumer enjoyment, the offer of specialized skills/knowledge (such as courses or guided walks). For example, if the forest owner or tenure holder has attractive forest lands that offer good opportunities to pick berries or mushrooms, view wildlife, or collect floral greenery, and they are located near an urban centre where such forest lands are rare, then the products are relatively scarce—i.e., people cannot easily find them for free. If access to similar forest lands is easy, however, then it is necessary to offer something that is not otherwise available, such as workshops on how to create Christmas decorations, gourmet cooking classes, or training in how to identify edible mushrooms.

7.3 If there is a product to sell, can those who do not pay be excluded?

Access to the forest environment is difficult to convert from a “free good” to a marketable product mainly because exclusion may be illegal, or if legal, difficult or expensive. It may be possible to close roads to exclude vehicles, for example, but it would not be possible to exclude individuals on foot. It is generally easier to limit access if the forest owner or tenure holder provides structures or facilities in addition to simply providing access to the forest environment (Merlo et al. 2000). Value-added products and services such as guided tours are also “excludable.” The long history of open access to non-timber goods and forest services in British Columbia, coupled with the relative abundance of these goods and services, is likely to limit public acceptance of restrictions to the forest.

7.4 Does the forest owner or tenure holder want to deal with the consumer?

Production of commodities—whether logs or floral greens in bulk—does not usually require much interaction with the final consumer. Many individuals who work in the forest likely do so, in part, because they value the relative isolation and independence of this lifestyle. Direct marketing and tourism, in contrast, are all about dealing with the consumer and understanding and meeting his or her needs. If the forest owner or tenure holder does not like dealing with consumers on a regular basis (or if they cannot establish the enterprise in cooperation with someone who does), NTFP-tourism ventures are probably not for them.

7.5 Does the forest owner or tenure holder have the skills to start and run a service-oriented business?

Assuming there is market demand for the products, the problems of excluding non-payers can be effectively dealt with, and if the forest owner or tenure holder is interested in dealing more directly with the customers, he or she still needs to consider whether they have all the skills necessary to make the business a success. Normally, individuals like, and are good at, production, finance, or marketing, but rarely all three (Sirolli 1998). Marketing is often the greatest challenge. If the forest owner or tenure holder’s main interest is in production, they should consider working with individuals or a firm that specialize in marketing. The direct farm marketing and agritourism sectors offer many examples of ways in which small producers have joined forces to address marketing issues. Forest owners and tenure holders already engaged in farm operations may be able to market their forest products and services through many of the same marketing outlets (farmers markets, fairs, etc.). If a tourism service, such as bed and breakfast, is already being provided, they may be able to add value to the operation by offering products and services from the forest. Complementary marketing of a variety of goods and services, especially “regional” marketing, can be an effective way of marketing a “bundle” of products and services around a common theme.

7.6 What are the possibilities for regional (also called “destination” or “territorial”) marketing?

Retail outlets such as antique stores and used book stores are often found in clusters. Rather than creating unwanted competition for each other, these clusters attract more customers than individual shops scattered around the city and they encourage joint promotion and other marketing activities. Pettenella et al. (2007) examined 20 case studies in Europe of non-timber forest goods and services marketed cooperatively in specific regions (referred to by the authors as “territorial marketing”). The authors found that these products could be either the main product marketed within a particular region (e.g., truffles or chestnuts in Italy), or could be offered in conjunction with the main product (e.g., new wine, farm tours) or with the promotion of “free” attractions (e.g., parks or public concerts in the forest).

Potential linkages for regional marketing in British Columbia could include forest product/agriculture links (culinary tourism products) or wilderness tourism/forest product links (e.g., tourism with a

strong focus on “living from the wild”). The former is likely more suited to areas near urban centres and probably offers the best potential for territorial marketing in conjunction with complementary goods and services. As many non-timber products (as well as farm products) are seasonal, some regional marketing campaigns may take the form of festivals or special events. If the event is offered annually it can help establish the reputation of an area for particular products, which in turn supports their sale beyond the duration of the event.

7.7 What are some examples of non-timber forest products tourism?

The following extract from the Vancouver Sun (Stainsby 2009) illustrates several aspects of successful territorial marketing. A relatively new product, Big Leaf Maple Syrup, is easy to relate to traditional Canadian maple syrup, is promoted through festivals and similar events, and is part of a recognized culinary tourism region (Southern Vancouver Island).

B.C. Maple Syrup Comes Onstream

Maple syrup runs deep in the Canadian psyche and for generations, Eastern Canada has taken all the credit for this edible symbol of Canada.

...B.C. has awakened to the fact that maple trees grow like weeds here. In fact, to the forest industry, they are weeds. And suddenly, Vancouver Island is beginning to teem with maple “sap suckers”—that is, people tapping broadleaf maples for sap, which eventually becomes maple syrup.

After the second maple syrup festival, recently held in Duncan, the pioneers making up a maple syrup cottage industry realized it’s going viral. So far, most of the syrup produced is sold at the Duncan festival but as the industry grows, they’ll be available in stores.

“Maple syrup resonates with people. They’re usually gob-smacked [to find out it’s made on Vancouver Island],” says Bill Jones, chef and educator at Deerholme Farm in Duncan. He makes syrup from his own maples and he’s served as a judge at the two Duncan Bigleaf Maple Syrup Festivals.

In 2007, they expected 200 people to attend. Some 1,400 people showed up to learn and taste and buy. At the second festival, held last month, more than 2,000 attended and the maple syrup sold out after two hours.

“There’s no end of demand. It way outstrips the supply and there’s no limit to the trees. There’s an astounding demand,” says Gary Backlund, a central figure in the maple syrup movement. He’s also authored Bigleaf Sugaring, a self-published guidebook describing how to do it on the West Coast.

“I’ve read somewhere that the French [Canadians] refer to our maples as faux Canadian maple,” he says. He estimates that 3,000 litres of maple syrup were produced on Vancouver Island in 2007. “It’s at a backyard stage right now, but it’s at the point where a few large producers could come on board and you’ll start seeing it in specialty stores.

Source: Mia Stainsby, Vancouver Sun, March 14, 2009

APPENDIX 1 ADDITIONAL RESOURCES

Other examples of complementary and regional tourism can be found at the following sites:

Vermont Maple Festival

www.vtmaplefestival.org/

On the Truffle Trail (Italy)

<http://italianfood.about.com/library/weekly/aa140797.htm>

Moose Meadows Farm (British Columbia)

<http://moosemeadowsfarm.ca/>

Feast of Fields (Farm Folk/City Folk Society)

www.feastoffields.com/

Christmas Tree Farms, Tree Lots, Hayrides, Sleigh Rides and Other Winter Fun

<http://pickyourownchristmastree.org/>

Wild Food!

www.wildmanstevebrill.com/

Sicamous Fungi Festival

www.fungifestival.com/weekend.html

Wilderness and survival schools and courses include many aspects of how to use wild plants in various ways. Search for 'survival' or "bushcraft" courses to find organizations and instructors that may be interested in working with you.

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