Circular Economic Regional Market Assessment

CONSTRUCTION, RENOVATION & DEMOLITION WASTE MATERIALS

COWICHAN VALLEY REGIONAL DISTRICT

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Prepared by

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SYNERGY FOUNDATION

This report was prepared by Light House (www.light-house.org) for the Synergy Foundation to support the Circular Hubs Project serving the Cowichan Valley Regional District and the broader community. Light House works with government and industry to create regenerative and circular built environments that nurture ecological and human health.

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Table of Contents

1 Introduction

Construction and the broader built environment are key contributors to the economy on Vancouver Island. In the Cowichan Valley Regional District (CVRD), construction, renovation and demolition (CRD) activity reflects ongoing economic shifts and the region's proximity to neighbouring urban centres.

With support from the B.C. Government's Rural Economic Diversification and Infrastructure Program (REDIP) and PacifiCan, the Synergy Foundation commissioned this Regional Market Assessment to better understand the Cowichan Valley Regional District's construction, renovation, and demolition sector; identify opportunities to advance circular economy practices; and assess regional gaps that could be addressed through the development of circular hubs.

The CVRD encompasses a range of communities situated between Nanaimo and the Capital Region and extending to the west coast of Vancouver Island (see Figure 1). Many of these communities are experiencing growth pressures that are reshaping local priorities around housing, infrastructure, and climate resilience. Population estimates place the CVRD at approximately 95,822 residents in 2025, with steady growth concentrated in North Cowichan, Ladysmith, Duncan, and Lake Cowichan.[1]

The largest First Nations in British Columbia by population is the Cowichan Tribes, with a population of 5,298. They are one of the region's largest employers and invest significantly in both the local and regional economy.[2]

Construction, renovation, and demolition activity is closely tied to the age and condition of the local housing stock, as well as ongoing redevelopment. Over the past decade, the region has averaged approximately 270 new housing starts per year, providing a consistent stream of materials that could be captured through recovery and circular economy initiatives. A circular economy emphasizes keeping materials in use for as long as possible through reuse, repair, recycling and recovery, while designing out waste and pollution. This approach offers opportunities to spur local economic activity and jobs, retain material value, and reduce reliance on increasingly expensive virgin materials.

[1] Statistics Canada. Table 17-10-0152-01 Population estimates, July 1, by census division, 2021 boundaries
[2] British Columbia Assembly of First Nations. Cowichan Tribes | British Columbia Assembly of First Nations

Figure 1: Map of the CVRD[3]

The CVRD's Solid Waste Management Plan (SWMP) sets out a long term- vision and key strategies to move the region toward Zero Waste across various solid waste streams, including CRD materials.[4] At the same time, regional and municipal governments are advancing circular economy efforts. The CVRD and its member municipalities supported the Project Zero Circular Economy Accelerator Program (led by the Synergy Foundation), which provided site level-assessments and action plans for local businesses.

Collectively, population growth, high out of region disposal costs, and emerging circular economy programs create a strong policy and market rationale for improving CRD material recovery in the CVRD. Circular economy strategies are especially relevant in island regions like the CVRD, where geographic constraints and transportation costs make material recovery, local processing, and resource efficiency essential for strengthening economic resilience and supporting the transition to a clean economy.

[3] Map Source: CVRD South Cowichan Community Issues Assessment
South Cowichan Community Issues Assessment | Plan Your CVRD
[4] CVRD Solid Waste Management Plan Update Amendment 4
https://www.cvrd.ca/DocumentCenter/View/91182/181017_SWMP-Update

1.1 Study Purpose and Objectives

Funded through the BC Government's Rural Economic Diversification and Infrastructure Program (REDIP) and PacifiCan, this Market Assessment Study aims to support the development of one or more regional circular economy hubs in the CVRD. These hubs are envisioned as collaborative networks that enable the recovery and repurposing of CRD materials, increasing diversion for reuse, recycling, and value-added manufacturing. They could also foster partnerships among construction-related businesses, local governments, First Nations, social enterprises, and educational institutions.

See the Circular Hub Best Practices Report for supporting research on Circular Economy Hubs and an overview of C&D material recovery strategies.

Local government, industry, and community organizations all have a role to play in shaping a circular hub.

- Policy and infrastructure create the enabling conditions
- Businesses and trades innovate and operationalize solutions
- Community level efforts generate participation and cultural uptake.

This report speaks to these diverse groups, offering a shared foundation for advancing circularity in the CVRD.

1.2 Project Scope and Methodology

The scope of this assessment included evaluating current and future market capacity for reuse, reprocessing, and recycling of CRD materials within the CVRD. The study was designed to reflect the region's size, economic context, and infrastructure realities, drawing on insights from a targeted group of informants and providing actionable insights for industry, government, and supporting organizations.

A mixed-methods approach was employed, combining desktop research, primary and secondary data collection, and quantitative and qualitative analysis.

Key sources include:

- Statistics Canada (population, employment, industry trends)
- Canada Mortgage and Housing Corporation (CMHC) (housing starts, renovation activity)
- Regional district solid waste management data, annual reports, waste composition studies and demolition permits
- Provincial policy and regulatory documents relevant to waste management and circular economy initiatives

Study activities included:

- Conducting targeted interviews with local contributors.
- Hosting a community workshop to capture perspectives of local contributors and identify barriers and opportunities.
- Analyzing data on construction trends, existing housing stock, renovations and demolitions.
- Documenting existing material management infrastructure and processing capacity.
- Reviewing existing disposal, reuse, and recycling practices.
- Estimating current volumes and potential impacts of CRD waste, broken down by material type (e.g., wood, concrete, asphalt shingles, drywall) and building sector (residential, industrial, commercial, institutional).
- Estimating the economic value and untapped potential of diverting CRD waste, and potential beneficial uses for each material type.

A key component of the study was engagement with local businesses, solid waste sector and organizations and community members, to identity priority material streams, infrastructure needs, and partnership opportunities for CRD materials in the region.

This included a Waste to Resource Community Session (workshop) held in Duncan on November 25, 2025. This workshop brought together 21 key contributors to explore opportunities to reduce CRD waste and advance circular economy initiatives, with a

focus on identifying suitable hub models, community assets and gaps, and related economic opportunities. Participants engaged in facilitated discussions, shared insights, and proposed innovative solutions tailored to the region's unique needs.

See Appendix A - Engagement Summary for an overview of the interviews and workshop.

The study's findings are informed by data of varying quality, age, and completeness, including reliance on some 2021 datasets where more recent or local information was not available. Accordingly, the data is used to illustrate trends and to contextualize regional material flows, rather than to provide precise quantitative estimates. The assumptions underlying this analysis are documented in the relevant sections of the report.

2 Current State Assessment

This section provides a snapshot of the CVRD's construction sector and related building materials associated with construction, renovation and demolition activities. It also details the existing circular and waste management infrastructure in the region.

2.1 Sector Profile

Active milling activity within the Cowichan Valley Regional District is now more limited. Western Forest Products confirmed that its Chemainus sawmill will be closed through the end of 2026 due to poor market conditions, US tariffs and log supply challenges. The sawmill has been shut down since June 2025 and affects approximately 150 employees and the surrounding community.[5] The company's other mill Cowichan Bay Sawmill has also been impacted by curtailments.[6] Other major mills in the region have ceased operations in recent years, including the permanent closure of the Crofton pulp and paper mill in December 2025.

The construction sector is the third largest employer in the CVRD, following health care and retail trade. In 2021, it employed 11.3% of the workforce, up from 9.5% in 2016.

[5] North Cowichan (Jan 23, 2026), Statement regarding Western Forest Products' Chemainus mill closure announcement

[6] WDG. September 20,2025. *Chemainus Sawmill Shut Down Until 2026.* Available at: https://chemainus.com/chemainus-sawmill-shut-down-until-2026/

The sector has experienced a boom since the COVID-19 pandemic, with sharp rising job vacancy rates making it difficult to keep up with demand.[7] This growth trajectory highlights both the region's ongoing development activity and its potential to support circular economy initiatives through enhanced CRD waste recovery and value-added manufacturing opportunities.

Population growth, housing development, and renovation trends are key drivers of CRD waste generation. Regional population projections indicate the CVRD is expected to grow by 11.4% to 106,000 residents by 2046.[8] This growth will sustain CRD activity and increase the importance of upstream diversion strategies.

2.2 Construction, Renovation & Demolition Activity

New construction, renovation, and demolition activities together generate a steady stream of potentially recoverable materials. Although all three activities create opportunities for recovery, each produces different material types, volumes, and qualities and should therefore be considered separately.

Construction typically produces post-industrial, higher quality offcuts, while demolition produces post-consumer material, often lower in quality due to age, wear and damage. Renovation projects fall between these two, generating a mix of both.

Understanding the source of the waste can also support new policies, incentives and strategies for collection, sorting and processing infrastructure to capture the most value from CRD materials.

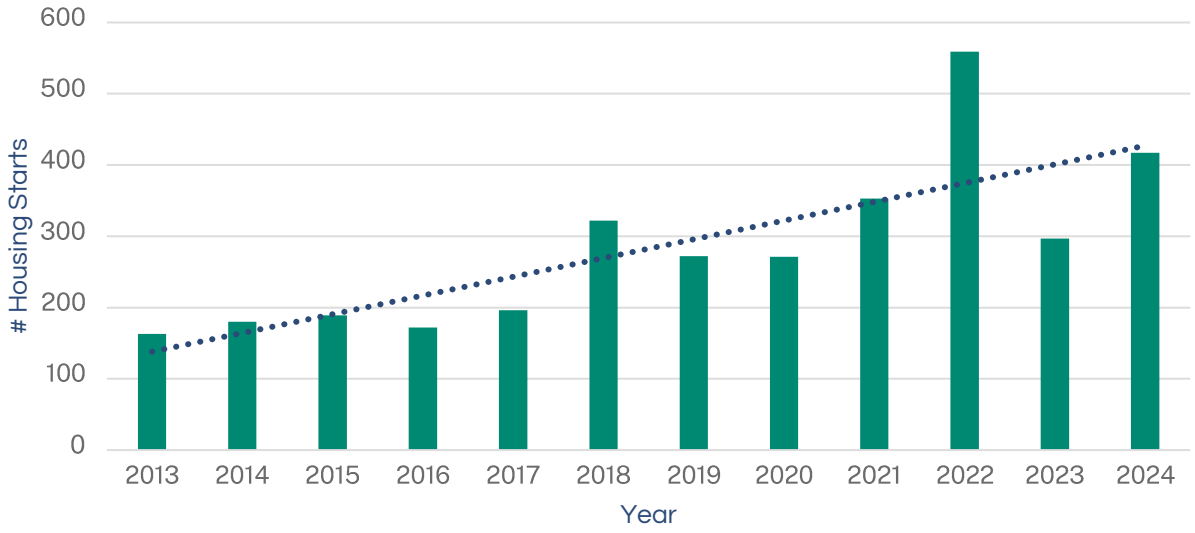
[7] State of the Cowichan Economy, Winter 2023 https://www.ecdevcowichan.com/wp-content/uploads/2023-01-State-of-the-Economy-Report-FINAL-1.pdf
[8] Ministry of Citizens' Services. 2025. Population Estimates of B.C. Regional District Level & Outlook for 2046. https://www2.gov.bc.ca/assets/gov/data/statistics/people-population-community/population/population_projections_regional_district_level.pdf

NEW CONSTRUCTION

Housing starts (new builds) data from 2013 to 2024 indicate an increasing trend in residential development, reinforcing projections of continued demand for construction materials and associated waste streams (Figure 2).[9]

Figure 2 is based on the Duncan Census Agglomeration, which includes the City of Duncan, the District of North Cowichan, and surrounding communities (includes areas D and E). Data does not explicitly note the inclusion of the municipalities of Ladysmith, Lake Cowichan and Areas A, B, C, F, G, H, I.

Figure 2: Housing Starts in Duncan Census Agglomeration (2013-2024)



Studies estimate that as much as 10 per cent of all materials by weight that are brought on site are wasted during a traditional stick-frame construction project.[10] **Assuming that the average 1,300sq ft home contains 65.4 tonnes of building materials[11] and 417 units were started in 2024, it is conservatively estimated that 2,727 tonnes building materials are wasted in construction annually.**

[9] British Columbia Housing Starts for Urban Areas and Communities https://www2.gov.bc.ca/assets/gov/data/statistics/economy/building-permits/econ_housing_starts_urban_communities.pdf

[10] Department of Trade and Industry. 1998. *Rethinking Construction*. P.15; Bossink & Bouwers. "Construction Waste: Quantification and Source Evaluation". March 1996. *Journal of Construction Engineering and Management*.

[11] Metro Vancouver. Demolition Waste Generation Rates Calculator.

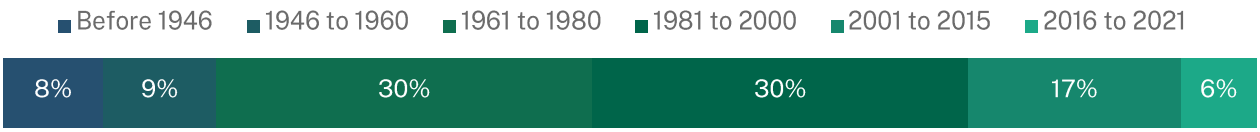
RENOVATIONS

Housing condition is a key driver of CRD waste generation, particularly through renovation and repair activities. While new construction responds to population growth and changing housing needs, the age of the housing stock contributes to ongoing renovation and demolition activity.

Approximately 47% of homes in the CVRD were built before 1980 (see Figure 3).[12] Housing condition data shows that 22% of dwellings require minor repairs and 7% need major repairs. The remaining 71% of the housing stock require only routine maintenance, which still generates some waste materials but helps avoid more significant repairs later.[13]

Figure 3 and Figure 4 are based on the Duncan Major Metropolitan Area (which includes the City of Duncan, the District of North Cowichan, Areas D and E, and surrounding communities, potentially First Nation reserves. Data does not explicitly note the inclusion of the municipalities of Ladysmith, Lake Cowichan and Areas A, B, C, F, G, H, I.

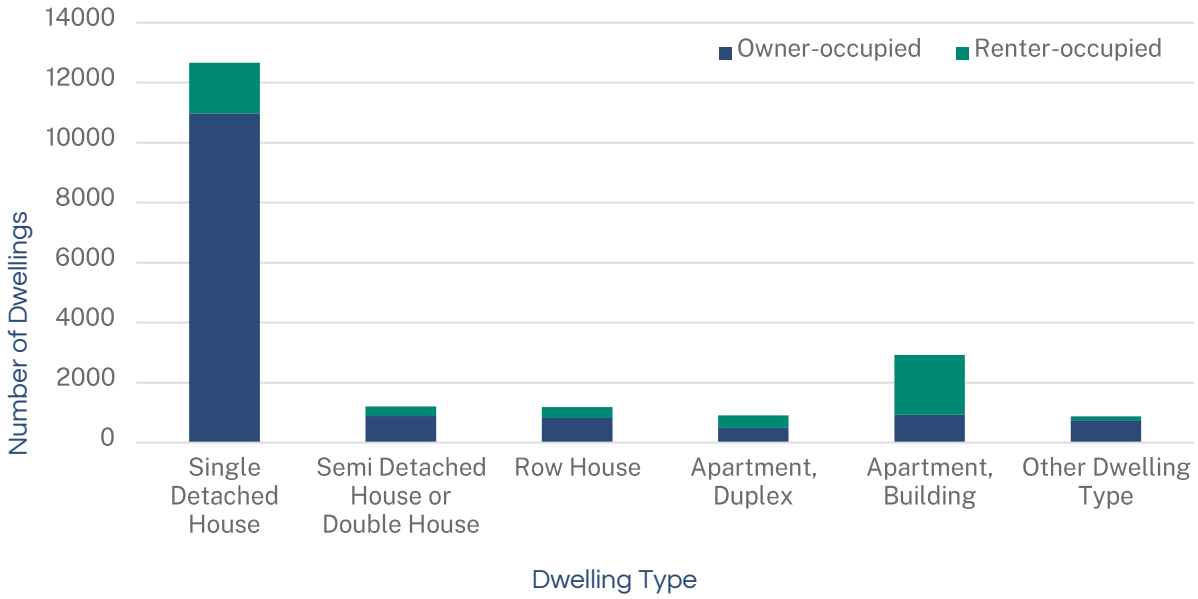
Figure 3: Duncan Major Metropolitan Area Housing Age Breakdown (CMHC, 2021)[14]



Within the housing stock captured by the CVRD dataset, approximately 64% of dwellings are single-detached, and 74% are owner-occupied (See Figure 4).[15]

[12] Canada Mortgage and Housing Corporation, Duncan Major Metropolitan Area Full Housing Stock Report (2021), CMHC, adapted from Statistics Canada (National Household Survey)
[13] Canada Mortgage and Housing Corporation. Adapted from Statistics Canada (National Household Survey).
[14] Canada Mortgage and Housing Corporation. Duncan Major Metropolitan Area Housing Stock Full Report.
[15] CMHC Duncan Housing Stock www03.cmhc-schl.gc.ca/hmip-pimh/en/#Profile/7225/3/Duncan

Figure 4: Duncan Major Metropolitan Area Dwellings by Type: Owner versus Renter Occupied (CMHC 2021)



While it is not possible to estimate the volume of wasted material generated from renovations, the high proportion of single-detached, owner-occupied dwellings indicates that renovation activities are largely driven by individual homeowners, which may in turn present greater opportunities for material salvage given homeowner's direct control over renovation decisions.

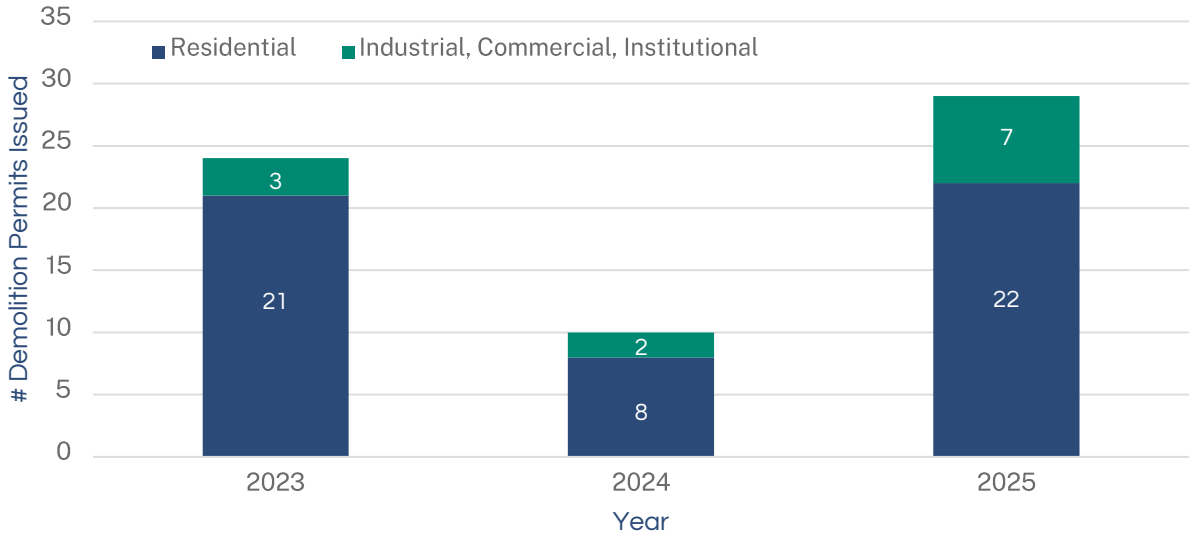
DEMOLITIONS

In addition to ongoing renovation, both the aging housing stock and redevelopment activity contribute to modest but steady levels of demolition in the region. Figure 5 and Figure 6 show demolition permits issued in North Cowichan and Areas A-I in the CVRD region.[16] While permit data is not a direct correlation to actual demolitions, it is useful for forecasting potential waste generation.

Demolition permits are from North Cowichan. It does not include the City of Duncan, municipalities of Ladysmith and Lake Cowichan, and Areas A-I.

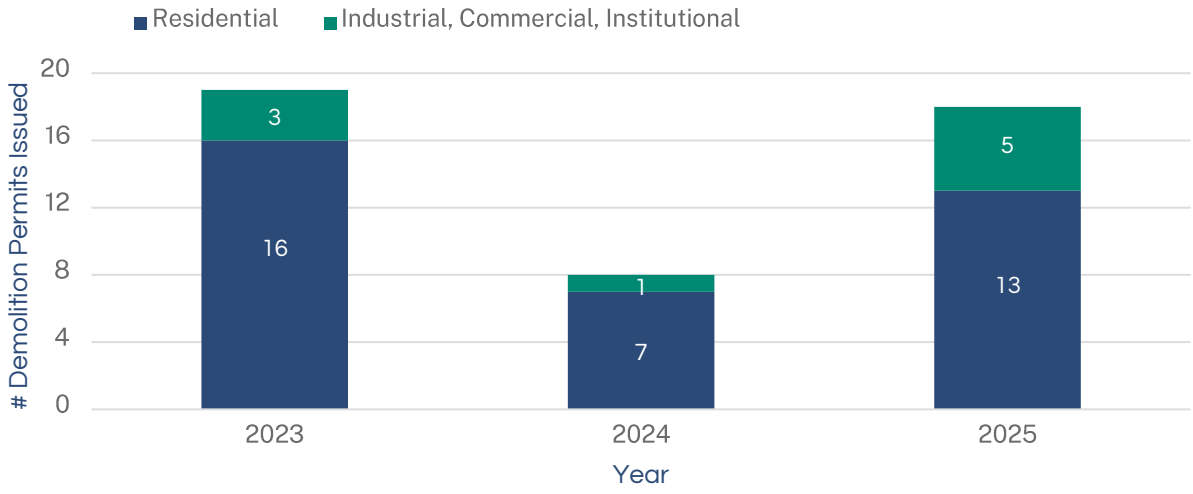
[16] Municipality of North Cowichan Building Permit Database https://www.northcowichan.ca/business-development/building-services/building-permit-database

Figure 5: North Cowichan Demolition Permits Issued (2023-2025)



Demolition permits are from Areas A-I (see Figure 1) for institutions and commercial and residential permits. Data does not explicitly note the inclusion of the City of Duncan, and the municipalities of Ladysmith and Lake Cowichan.

Figure 6: CVRD Demolition Permits Issued (2023-2025)



To illustrate the waste generation of one single demolition, it estimated that the average 1,300 sq ft wood-frame, single-family home contains 65.4 tonnes of material (including 16.4 tonnes of concrete associated with the foundation).

Based on an average of 15 residential demolitions per year in North Cowichan and the CVRD, this equates to approximately 981 tonnes of material annually.

Transitioning from a demolition approach to employing deconstruction can salvage a large portion of these materials. In a typical residential deconstruction, between 16-25% of materials can be reused and between 30-70% recycled.[17][18] Examples include carefully removing doors and windows, wood beams and flooring for reuse, as well as dismantling interior walls to separate materials (e.g., drywall and insulation).

Recoverability during deconstruction is influenced by material quality, construction methods, the condition of the structure, and even proximity to buyers and end-markets. Reuse practices are often prioritized over recycling, and some municipal deconstruction bylaws provide higher diversion credits for reuse (e.g., Metro Vancouver).

See Appendix B- Residential Deconstruction Case Study.

2.3 Waste Management Infrastructure

Based on the calculations above, **more than 3,708 tonnes of building materials are conservatively estimated to be wasted each year in the CVRD from residential construction and demolition activities.** This accounts for approximately 78% percent of the CRD materials received at public transfer stations in 2024 (see Table 1).

The CVRD's solid waste system consists of a regional transfer station and supporting depots at Peerless Road and Meade Creek (see Figure 7). The CVRD does not operate a local landfill, and as a result, waste generated in the region is shipped outside the CVRD for disposal. Typically, waste is consolidated at the Bings Creek Transfer Facility and transported by truck to Duke Point in Nanaimo, barged to Vancouver, and then railed to the Roosevelt Landfill in Washington State. This long-distance transport makes disposal comparatively costly and a strategic incentive to prioritize reduction, reuse, and recycling.[19]

[17] Delta Institute. (May 2018). Deconstruction & Building Material reuse: A Tool for Local Governments & Economic Development Practitioners. Deconstruction-Go-Guide-6-13-18-.pdf
[18] Drawing on industry interviews regarding current deconstruction practices.
[19] CVRD Recycling & Waste Management https://www.cvrd.ca/3427/Where-does-my-garbage-go

At present, private operators manage a significant portion of CRD waste handling, including transfer and sorting activities, while regional facilities primarily focus on residential-scale loads and selected material streams. Acceptance of drywall (gypsum) at CVRD facilities was discontinued in 2018 due to asbestos risk, creating additional logistics and cost considerations for renovation and demolition projects.

Several private facilities provide specialized services to address these gaps. GFL Environmental operates a facility on Boys Road that offers commercial hauling and hazardous material management, including acceptance of asbestos-contaminated materials by appointment. Fisher Road Recycling in Cobble Hill provides transfer and recycling services and accepts drywall under defined material condition requirements.[20]

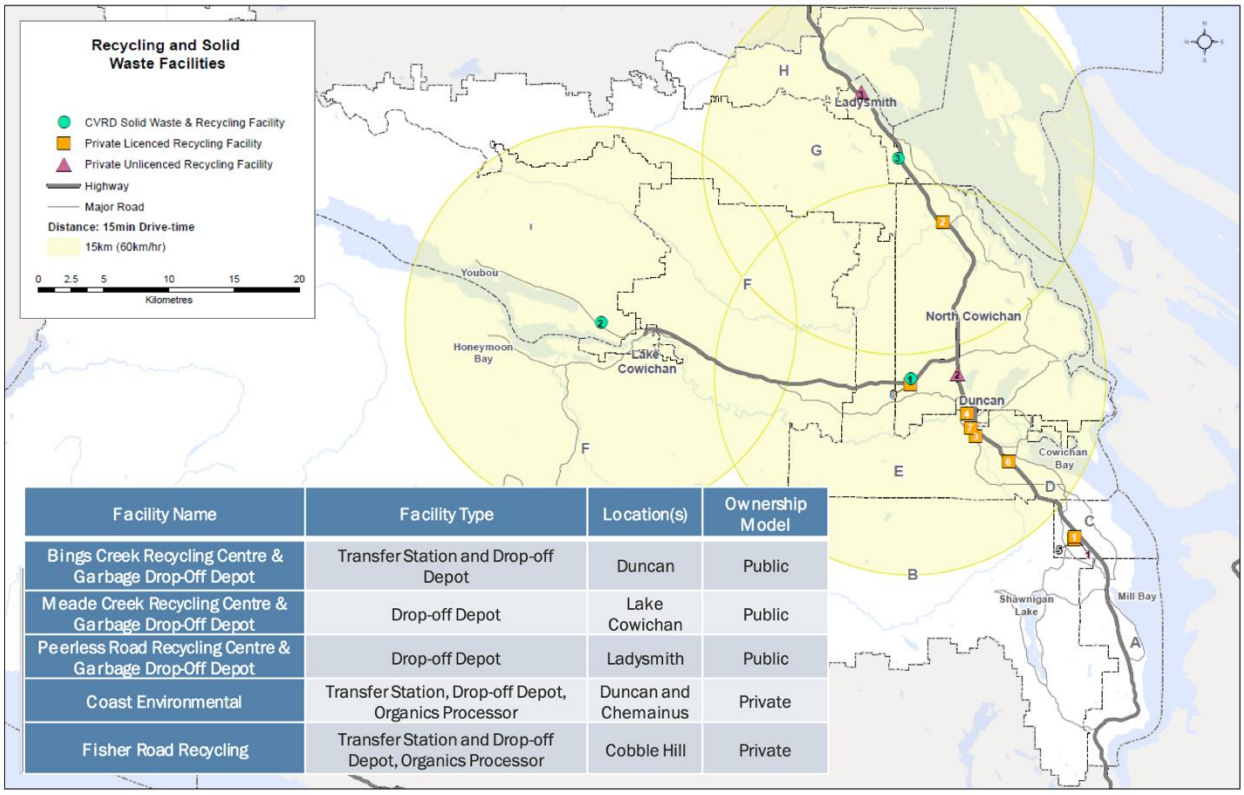
The CVRD Solid Waste Management Plan (SWMP), guided by its 2018 Amendment, establishes a long-term vision and a set of actionable strategies to advance the region toward zero waste. Since its initial adoption in 1995, the SWMP has evolved through multiple amendments to address changing regulatory, environmental, and community priorities. The most recent amendment, approved in 2020, identifies 13 core strategies addressing all municipal solid waste streams, including garbage, recycling, organics, and CRD materials.

Historically, CRD waste has been noted in regulatory initiatives, such as bylaws regulating land clearing debris, facility licensing, and in waste diversion objectives. While the CVRD's facilities have limited capacity to accept CRD materials, the region continues to explore opportunities to improve CRD waste management, material recovery, and reuse through initiatives emerging from the SWMP. Recent efforts also emphasize the integration of Indigenous perspectives into waste infrastructure planning and upgrades, reflecting a growing commitment to sustainability, reconciliation, and community collaboration.

As population and waste volumes increase, the SWMP is directing attention toward the development of new programs and infrastructure to expand CRD waste reuse, support value-added manufacturing, and further evolve regional waste management practices in support of a resilient and circular economy.[21]

[20] CVRD Recycling & Waste Management. 2026. Accepted Materials and Fees. https://cvrd.ca/services/garbage-recycling/waste-and-recycling-facilities/accepted-materials-and-fees/
[21] CVRD eSolid Waste Management Plan Amendment 4 https://www.cvrd.ca/2979/Solid-Waste-Management-Plan

Figure 6: CVRD recycling and solid waste facilities



Facility Name	Facility Type	Location(s)	Ownership Model
Bings Creek Recycling Centre & Garbage Drop-Off Depot	Transfer Station and Drop-off Depot	Duncan	Public
Meade Creek Recycling Centre & Garbage Drop-Off Depot	Drop-off Depot	Lake Cowichan	Public
Peerless Road Recycling Centre & Garbage Drop-Off Depot	Drop-off Depot	Ladysmith	Public
Coast Environmental	Transfer Station, Drop-off Depot, Organics Processor	Duncan and Chemainus	Private
Fisher Road Recycling	Transfer Station and Drop-off Depot, Organics Processor	Cobble Hill	Private

2.4 Waste Composition

In 2024, there were three public transfer stations in operation; however, as of 2025 only two remain operational. Table 1 presents the tonnages received across facilities, organized into commercial and public streams. As facility licenses do not mandate separate reporting of clean versus painted wood, these materials are aggregated.

The waste volumes presented in Table 1 reflect publicly reported data only. Materials managed by private sector entities (including contractors, haulers, waste management) may be diverted to alternative facilities or regions (e.g., concrete recycling) and are not captured in the reported volumes.

Table 1: CRD waste tonnages for licenced private and public facilities, 2024 (source: CVRD Recycling & Waste Management Division)

Material	Commercial Stream (Tonnes)	Public Stream (Tonnes)	Total (Tonnes)
Painted Wood	6,001	1184	7,853
Clean Wood		668	
Metal	1,399	1,976	3,375
Rubble (includes asphalt, brick, concrete, gravel, and rock)	1,170	34	1,204
Asphalt (Shingles)	307	917	1,224
Mixed CRD waste	6,519	-	6,519
Drywall	2,066	-	2,066
Tar and Gravel Roofing	18	-	18
TOTAL	**17,480**	**4,779**	**22,250**

While detailed CRD waste composition data is limited, a 2017 waste composition study provides estimates of the region's CRD waste composition based on a single load diverted for analysis.[22] The study notes that CRD material is typically dropped off at facilities at Fisher Road and Boys Road, and then "sorted, and recyclable materials are removed by staff, with only non-recyclable residual waste being sent for disposal."

Based on the residual CRD waste analyzed in the study, the waste stream consists primarily of non-compostable organics, plastics, fines, and building material (see Table 2 below).

Table 2: Commercial CRD waste composition (2017 study)

Material Type	Percentage (%)
Non-Compostable Organics (mostly wood)	39.5
Plastics	20.9
Fines	17.1
Building Material	12.8
Bulky Objects	3.3
Paper	3.2
Metals	1.0
Other (compostable organics and textiles)	2.2

[22] Tetra Tech. 2017 Waste Composition Study, presented to Cowichan Valley Regional District. https://cvrd.ca/wp-content/uploads/2025/09/2017-CVRD-Waste-Composition-Study_IFU.pdf

Table 3 outlines the current CRD waste management practices in the CVRD as reported by key contributors in interviews and the workshop.

Table 3: Current handling for common CRD waste materials in the CVRD

Material stream	Current handling in the CVRD
Clean Wood	- Collected at CVRD Recycling Centres.[23] Typically included in mixed CRD loads, with some separation at transfer stations. - Wood residuals are used as biomass fuel for industrial operations in some cases, though recent mill closures on Vancouver Island may disrupt this material flow. - Some source separation and deconstruction are happening through a new circular hub, run by The Reuse People of Canada at the Malahat Industrial Park. - Clean wood can also be recycled and used for fuel at facilities in Nanaimo.
Painted/Treated Wood[24]	- Wood waste is collected at CVRD Recycling Centres and taken to be processed into engineered fuel to power the Lafarge cement plant in Richmond, BC. - Painted wood is currently landfilled, but it is seen as a high-priority material for diversion.
Metal	- Accepted at Fisher Road Recycling. - Diverted from mixed loads and sent to scrap markets.
Concrete/Asphalt	- CVRD Recycling Centres collect asphalt shingles, brick, concrete, concrete blocks, paving stones, gravel, rock/gravel, tar. - Concrete is typically recycled (Deconstructors Demolition) - Asphalt shingles currently go to landfill; previous recycling efforts stalled (interest in reviving the program).

[23] CVRD Construction and Demolition Waste https://cvrd.ca/services/garbage-recycling/special-material-handling/construction-and-demolition-waste/

[24] Treated wood includes wood that has been painted, stained, or pressure treated. Also includes wood that contains metal fasteners.

Drywall	- Drywall is accepted at GFL Environmental in Duncan and Chemainus, and at Fisher Road Recycling in Cobble Hill (1990 onwards).[25] [26] - Some separation occurs and is then shipped to recycling facilities outside of region.

3 Policy and Regulatory Review

Effective policy frameworks are essential for advancing circular economy practices in the CRD sector. In the CVRD, current regulations provide a foundation for waste management but lack the specificity and enforcement mechanisms needed to drive significant diversion of CRD materials. This section reviews current federal, provincial, and local policies, identifies gaps, and highlights opportunities for improvement.

3.1 Federal and Provincial Policies

At the provincial level, British Columbia has implemented Extended Producer Responsibility (EPR) programs for various material streams to stabilize the financial and operational foundations of recycling systems and support processing and market development. However, these programs have yet to address CRD waste, which, in turn, affects collection and recovery success for these materials.

Building codes also present barriers to reuse, particularly for structural applications. Salvaged lumber and steel often cannot be reintegrated into new builds because they lack engineering certification, even if they meet basic quality criteria.

Federal policy plays a more indirect role, primarily through funding programs and sustainability targets. While these initiatives encourage innovation, they do not impose mandatory requirements for CRD waste diversion.

3.2 Local Policies

Local policy frameworks in the CVRD currently include a mix of incentives and mandatory measures for CRD waste management. There are no deconstruction bylaws requiring material separation or diversion, and CRD waste streams are mainly handled by private

[25] Cowichan Valley Regional District. *Cowichan Recyclopedia*. https://www.cvrd.ca/services/garbage-recycling/recyclopedia/
[26] Fisher Road Recycling - Fisher Road Recycling

facilities. This regulatory gap limits the effectiveness of tipping fee surcharges, which, while intended to discourage disposal of clean materials, are insufficient to drive large-scale change without complementary infrastructure and enforcement.

Workshop participants and interviewees identified several policy and incentive gaps that limit diversion and material reuse. Key opportunities include improved tax credits and charitable donation incentives, streamlined permitting for deconstruction and hauling, and clearer licensing pathways for material handling. The City of Victoria's deconstruction bylaw was cited as an effective demand driver, though participants noted that outside Victoria, stronger justification and promotion are needed to achieve similar uptake.

Differential tipping fees for mixed versus source-separated loads were viewed as an effective behaviour-change tool when price signals are significant, with recent increases in demolition waste tipping fees strengthening this incentive. Participants also highlighted public-sector procurement as an underutilized lever, noting that specifying recycled or reused content in capital projects could stimulate markets for recovered materials and support investment in recovery infrastructure.

Additional considerations included the need to align landfill sorting requirements with viable end markets, address liability constraints faced by reuse organizations, and adjust financial incentives to better support reuse and value-added processing.

The following are examples of local policies from other regions that may be relevant to the CVRD:

- **Early Green Removal and Move-On Permits:** This municipal policy offers expedited permits for the relocation/deconstruction of homes (early green removal permit) and resituating of moved homes (move-on permit) to disincentivize demolition. The District of North Vancouver offers an expedited permit process for its green demolition permit. The Town of Comox has a move-on permit.
- **Clean Wood Landfill Ban:** This initiative involves creating pathways to salvage, de-nail, process, and resell reusable wood. The Capital Regional District banned clean wood from landfill in January 2024 and established an on-site processing facility where clean wood is received and processed into refuse derived fuel (RDF). Fees for clean wood at the Hartland Landfill are $80/tonne.
- **Deconstruction Bylaws:** Many municipalities in BC and across Canada have updated their solid waste bylaws to require building deconstruction. These bylaws vary in scope, including differences in building type, age, and salvage requirements. They typically require contractors to provide a refundable deposit that is returned once proof of meeting the salvage quota is submitted. The City of

Victoria requires all single-family homes or duplex built before 1960 to be deconstructed. A $19,500 refundable deposit is taken with the demolition permit application and returned once the contractor provides evidence that 40 kg of wood has been salvaged (for reuse/sale/donation) per square metre of liveable floor space.

4 Summary of Successful Diversion Programs

Successful diversion programs demonstrate that targeted policies, infrastructure investment, and collaborative partnerships can achieve significant reduction and diversion of CRD materials while creating economic and social benefits. This section highlights examples from the CVRD and other jurisdictions, illustrating strategies that could inform local implementation.

4.1 Regional Examples and Emerging Practices

Several local initiatives and practices indicate viable pathways to reduce construction, renovation, and demolition (CRD) waste within the CVRD. Collectively, these examples demonstrate how incremental, practical actions, when supported by regional coordination, can shift informal salvage activities toward more consistent diversion and reuse outcomes.

- **Practitioner working groups**, such as the Coast Waste Management Association (CWMA) working groups were identified as effective knowledge-transfer platforms and could be replicated at a regional scale through a hub-based model.
- **Reuse facilities, including free-store concepts**, were cited as accessible entry points for material reuse, with opportunities emerging such as the consideration of a third-party-operated reuse area at Bings Creek.
- **Targeted innovation opportunities** include maker spaces and micro-recycling approaches for variable material streams. Examples include higher-value salvage reaching secondary markets beyond the region (e.g. creating gym floors).
- The ReUse People of Canada is leading the development of a circular hub for wood and other building materials at the Malahat Industrial Park, providing a locally grounded model for material recovery and redistribution. The hub pre-processes reclaimed wood through activities such as denailing, trimming, grading, and quality control, standardizing materials for local reuse applications. DL Bins, which operates both hauling services and the wood diversion program at the Hartland Landfill, is now diverting pallets of clean wood to the hub.

These examples underscore the importance of pairing technical and regulatory solutions with community engagement. They also show the value of collaboration among businesses, industry, social enterprises, and local government to align storage, logistics, and market development with everyday construction practices.

4.2 Best Practices from Other Jurisdictions

Case studies from other regions offer additional insights:

- **Washington State Building Code Reform:** Policy changes allow certain reclaimed wood to be "assumed structurally sound" under defined conditions, removing a major barrier to reuse. This approach demonstrates how adaptive codes can unlock material recovery opportunities without compromising safety.
- **Whistler Transfer Station Salvage Program:** A pilot program launched in the summer of 2025 allowed contractors and residents to drop off reusable wood at a reduced rate and pick up materials for free through a designated drop off and pick-up area at the waste transfer station. This program illustrates how low-barrier access to recovered materials can stimulate local reuse markets.[27] The municipality is continuing the reduced tipping fee for reusable wood, now priced $135 per tonne lower than clean wood, to encourage contractors to separate and prepare materials before arriving at the facility.[28]
- **CRD's Wood Waste Public-Private Partnership:** The Capital Regional District (CRD) has implemented a clean wood ban and accepts clean wood at a reduced tipping fee. Clean wood processing is contracted out to DL Bins at the Hartland Landfill in the CRD, where the landfill provides space for the processing facility and the contractor supplies the infrastructure and secures end markets. Wood is ground and formed into BioFlame briquettes, which are used to heat facilities such as Saanich Commonwealth Place, fuel residential wood stoves, provide heat for local greenhouses growing produce, and serve as hog fuel for pulp and paper mills on Vancouver Island. DL Bins now diverts pallets of clean wood to the circular hub at the Malahat Industrial Park in the CVRD for local reuse applications.

These best practices share common elements: enforceable policies, supportive infrastructure, and incentives that make recovery economically viable.

[27] McDonald, L. (June 20, 2025). Whistler inches toward zero-waste goals. Pique News Magazine. Whistler's landfill waste down, but 2030 zero waste goal questioned - Pique Newsmagazine
[28] Whistler Staff Report to Council. Wood Waste (page 3). Solid Waste Amendment By Law (2026 Tipping Fees) No. 2502, 2025. RMOW Report to Council

5 Market Analysis

Understanding current and future market dynamics for salvaged and recycled CRD materials is critical to designing effective circular economy strategies. This section examines demand trends, identifies systemic barriers, and quantifies the economic potential of material recovery in the CVRD.

5.1 Current Demand for Salvaged and Recycled CRD Materials

Demand for salvaged and recycled CRD materials varies by project and is influenced by what builders can use immediately and what local outlets can accept. Interviewees indicated steady outlets for aggregates and metals, and some opportunities for wood reuse.

Other streams (e.g., asphalt shingles, drywall) are more sporadic because of transport costs and the lack of local processing. Drywall tends to require shipment to specialized facilities outside of the region, increasing cost and limiting demand.

Feedback from interviews and the workshop, as well as waste composition data, all reinforce that wood is one of the most promising diversion opportunities, either for direct reuse (e.g., dimensional lumber salvage) or for indirect uses (e.g., biomass energy). Manufactured products from recovered wood show promise (e.g., fiber insulation, DLT/NLT/CLT feasibility) subject to quality assurance and grading.

> **"Wherever there is real money to be made, they will salvage it."**— Key informant interview

5.2 Future Demand for Salvaged and Recycled CRD Materials

Key contributors see potential for growth in several areas:

- **Capabilities exist but remain fragmented.** Metals and aggregates have relatively steady outlets through haulers and transfer stations, and modular manufacturers expressed interest in using salvaged inputs provided that grading/quality assurance and supply consistency can be met. Contractors reported strong DIY demand for reclaimed items, frequent use of Facebook Marketplace for resale,

and some adoption of the online marketplace- Building Material Exchange (BMEx) among some deconstructors.

- **Workshop participants generally supported a hybrid hub model** involving a central facility supported by satellite sites and shared logistics. Priority features included dry storage, co-located de-nailing and sorting, material-specific hubs (for wood, aggregates, and plastics), and policy tools such as financial incentives, permit-based touchpoints, and charitable donation or tax-credit mechanisms to catalyze reuse at scale.

Despite these opportunities, regulatory and other barriers can suppress demand for diverted materials, described further in the next section below.

5.3 Identification of Gaps & Barriers

Research findings suggest several barriers that limit CRD diversion and secondary material market growth in CVRD. Many of these barriers are related to common operational realities, such as labour, sorting/processing space, and price signals.

The absence of mandatory CRD waste management plans and deconstruction bylaws represents one of the most significant barriers to improving diversion rates in the CVRD. Key contributors expressed strong support for policies that move beyond voluntary compliance to enforceable standards.

Gaps and barriers are further described by theme below.

Infrastructure, Logistics & Site Operations

- DIY and small-scale buyers remain highly active and price-sensitive, institutional demand likely with procurement preferences.
- Marketplace & Brokerage: fragmented information; BMEx underutilized by some; need for a more user-friendly, populated marketplace.
- Sorting & Separation: capacity varies; source separation universally cited as the top lever for higher diversion and cleaner feedstocks.
- Storage and Space: the most cited barrier; costs of $2–$3/sq ft annually reported; lack of insured, accessible storage stalls growth.
- Logistics: island geography and ad hoc hauling—demand for a scheduled ‘bus for stuff’ model to consolidate volumes cost-effectively.

Policy & Market Signals

- Policy Price Signals: tipping fees are often too low to move behaviour; broader incentives (e.g., refundable deposits, homeowner benefits) proposed.
- Reuse operators report material constraints: despite the ability to generate substantial tax credits for homeowners (one interviewee noted approximately $180,000 facilitated), they continue to face insufficient inbound material supply due to limited full-deconstruction activity and inconsistent sourcing pathways.

Material Quality and Risk

- Standards/Grading: structural reuse of wood constrained by lack of grading/testing pathways; aggregate specification issues also noted.
- Manufactured products from recovered wood show promise (e.g., fiber insulation, DLT/NLT/CLT feasibility) subject to quality assurance and grading.

Labour Market Challenges

- Labour & Safety: deconstruction is demanding and hazardous; wages and training must align with risk and skill requirements.

These barriers collectively constrain the development of a robust circular economy for CRD materials in the CVRD. Addressing them will require coordinated action across policy, infrastructure, and market development.

5.4 Economic Opportunity Quantification

The economic potential of CRD material recovery and reuse in the CVRD could be significant, considering factors such as the proximity to large end markets and the added cost of shipping waste outside the region. Current disposal practices represent lost value that could be captured through improved diversion systems.

The CRD material volumes reported in 2024 were used to estimate the potential economic impact of waste diversion activities in the CVRD. **Diverting 14,500 tonnes of key waste material streams could support 21 direct jobs and generate $2,118,054 in direct economic contribution** (gross value added), with wood representing the most valuable material.


CREDIT: STOCK

This is for illustrative purposes; because contamination, processing losses, and downcycling are part of the recovery process, not all collected materials will be fully diverted.

See Appendix C - Economic Analysis for more detail.

The gross value added covers the collection, sorting, and preparation of CRD materials for reuse or further processing, as well as some associated economic activity. **However, it represents only a portion of the waste value chain; greater social, economic, and environmental value could be achieved through processing and value-added manufacturing.**

In addition, it is important to distinguish direct from indirect jobs. Direct jobs are the positions created within the waste recovery activities themselves, such as workers who collect, transport, process, and remanufacture materials. These roles exist because the recovery activity is happening.

Indirect jobs, which are more difficult to estimate, are created in the industries that support waste recovery, including equipment suppliers, maintenance services, logistics providers, professional services, and entrepreneurship. These roles further amplify economic value and are enabled because recovery activities create demand across the broader economy.

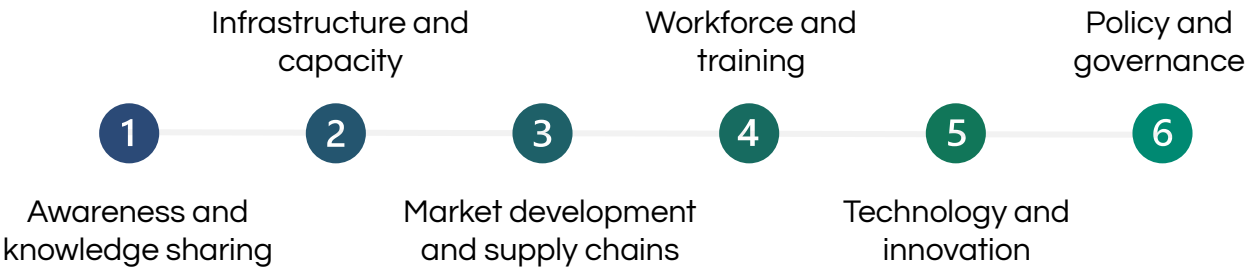
Market development efforts should prioritize source-separated, well-graded, and high-quality materials. This is especially true for wood, as opportunities exist for high-value reuse in applications such as salvaged dimensional lumber, beams, and flooring. Evidence of this opportunity can be seen in the early success of the circular hub being developed at Malahat Industrial Park.

Advances in circular knowledge, policy, and infrastructure can unlock markets for building material reuse, increasing their value and associated job and economic benefits. The next section explores how targeted actions can transform CRD waste into an economic and environmental asset for the CVRD.

6 Opportunities and Recommendations

A circular economy works best when industry-level systems and community-level actions reinforce each other. **Community engagement contributes to CRD material recovery and cultural momentum, while industry and government provide investment, infrastructure, expertise and market development.** This synergy enables communities to maximize material value, drive sustainable practices, and strengthen both conversation and action around circularity.

The opportunities and recommendations provided below build on the regional context (Section 2), policy insights (Section 3), case studies and best practices (Section 4), and market analysis (Section 5). They are also informed by feedback received from key contributors during the interviews and workshop. Opportunities and recommendations are grouped into six categories:



For each recommendation, business, government or NGO collaborators are identified as a lead ("L") or supporter ("S"). Each recommendation is also assessed for ease of implementation from the perspective of the lead contributor, highlighting where easy wins may be achieved and where collaboration or support may be beneficial. In some instances, we have indicated where different or multiple lead contributors are possible. Finally, each recommendation is assessed based on is collective economic, social and environmental impact.

6.1 Awareness & Knowledge Sharing

Context: Providing multiple awareness raising channels is critical to the success of any circular economic strategy, highlighting the economic social and environmental benefits of programs and initiatives. In addition, individuals and industry need access to practical and accessible technical guidance on circular techniques, such as how to separate and prepare CRD materials for reuse.

Opportunity: Leverage existing resources (e.g., Regional District of Nanaimo's Construction Waste Best Practices Guide) to support initiatives and opportunities for recovering, separating, processing and reusing CRD materials within the community.

Actions	Effort	Impact	Who		
			Bus	Gov	NGO
6.1.1 Create online information sharing platform (e.g., Facebook Group) to discuss and amplify circular practices in the region.	Low Potential component of a Community-Base Information Group.	High Low-cost method to share information, connect people and support collaboration.	L	S	S
6.1.2 Building on existing guides, develop a circular construction toolkit, including sorting best practices, deconstruction checklists, and grading templates.	Medium Modify similar guides to local context.	Medium Provides tool to engage community.	S	S	L
6.1.3 Host Builder Breakfasts and other events designed to mobilize industry around material salvage and reuse.	Low Host morning sessions bringing industry together to learn and share ideas. Potential part of existing morning events hosted by industry associations.	Medium Builds communities and catalyzes initiatives.	S	L	L
6.1.4 Coordinate information about available CRD materials through common online interface (e.g. Cowichan Recycles app).	Low - Medium Depending on ability to modify Cowichan Recycles app.	Medium Provides information on where to take materials, and how to access to access them.	S	L	L
6.1.5 Create design guide to share examples for material reuse projects (e.g., greenhouses, raised garden beds, saunas).	Medium Depends on scope of project – online/print, etc.	Medium Supports local innovation and community awareness.	L	S	L

6.1.6 Promote local value-added and Indigenous businesses that are manufacturing products from salvaged and reused materials.	Medium Chambers of Commerce and Economic Development departments leverage local and regional relationships. Involve media.	Medium Builds markets, reputational capital of businesses and interest in circular economics.	S	L	L

6.2 Infrastructure & Capacity

Context: Physical infrastructure for sorting, storage, and processing of CRD materials is limited. Building site-level constraints, lack of local processing, and insufficient shared facilities restrict recovery and reuse and inhibit economies of scale.

Opportunity: Developing regional infrastructure can increase source separation, support small businesses, and create local processing capacity for high-value materials.

Actions	Effort	Impact	Who		
			Bus	Gov	NGO
6.2.1 Support the development of free-stores and other reuse hubs at municipal facilities like Bings Creek Transfer Station.	Medium Use existing infrastructure but requires coordination and potentially capital investment.	Medium - High Provides public-facing reuse access (free-stores).	S	L	S
6.2.2 Establish and expand material-specific processing hubs and value-added wood, glass, and plastics.	High Ideally business enterprises supported through government incentives (land, tax incentives) and industry support.	High Represents clean economy transition opportunity for the region.	L	S	S

6.2.3 Support shared infrastructure at depots/recycling centres, including storage nodes, de-nailing stations, and material processing equipment, with opportunities for co-location at transfer stations.	Medium Builds on existing facilities and well suited to phased or pilot implementation.	Medium - High Back-end processing capacity (e.g., de-nailing) to improve waste quality and diversion potential. Could pair with 6.2.1.	L	L	S
6.2.4 Facilitate shared access to equipment, provide micro-grants, and support end-market development to activate maker and micro-recycling ecosystems capable of absorbing priority material streams (e.g., painted wood, asphalt shingles, plastics).	Medium Can leverage existing makerspaces, nonprofits, or reuse hubs. Lower capital required compared to large infrastructure (small grants would help).	High Supports local innovation, small enterprises, and circular entrepreneurship.	L	S	S
6.2.5 Codify procurement preferences for salvaged materials on public projects.	Medium Amend municipal procurement policies to support material reuse.	High Provides leadership in stimulating market demand.	N/A	L	S
6.2.6 Repurpose legacy industrial sites (e.g., former mills) as hubs for circular businesses, enabling industrial symbiosis.	High Seek public/private partnerships to build circular.	High Key driver for circular economic activity in the region.	L	L	L

6.3 Market Development & Supply Chains

Context: Effective circular economy systems rely on connecting recovered materials to end users at scale. Coordinating supply chains, including reverse logistics, ensures materials flow efficiently and opportunities for reuse are maximized.

Opportunity: Mapping material flows and strengthening market pathways can increase efficiencies, reduce transportation impacts, and foster industry collaborations.

Actions	Effort	Impact	Who		
			Bus	Gov	NGO
6.3.1 Map supply chains from waste to value, assessing economic viability, identifying key partners and end markets.	Medium Involves detailed mapping. Could engage support of local academia.	High Critical to establishing main sources of materials and economics of reuse.	S	L	S
6.3.2 Leverage resources available (e.g., Vancouver Island Building Material Exchange) to aggregate supply and broker transactions.	Low Tie into existing reuse programs (e.g. Building Material Exchange, Habitat for Humanity Restores) in neighbouring regions.	High Direct access to regional markets for excess and salvaged materials.	L	S	S
6.3.3 Access financial incentives that support material reuse (e.g. charitable tax receipts from a qualified donee.)	Low Build incentives into business model. Government and NGOs can build awareness of these opportunities.	High Provides cost-saving to business and clients, and market advantage against competing industries (e.g. decon over demo).	L	S	S
6.3.4 Strengthen differential tipping fees (e.g., reusable wood, clean wood and contaminated wood) and require alignment with material-separation plans in permits.	Medium Can be implemented incrementally or piloted before full rollout.	High Strong price signal that rewards source separation and penalizes mixed loads.	S	L	S

6.4 Workforce & Training

Context: Cowichan Valley has a strong base of trades and applied-skilled occupations, providing a solid foundation for circular economy activities. Recent mill closures and shifts in legacy industries have created a need for retraining and skills development.

Opportunity: Integrating circular economy principles into training programs can build local capacity, support economic diversification, and provide the local workforce with clean economy, high wage transition options.

Actions	Effort	Impact	Who		
			Bus	Gov	NGO
6.4.1 Adapt existing skills training programs or introduce new modules, certificates, and micro-credentials that embed circular economy principles and hands-on, project-based learning.	Medium - High Engage with local and regional colleges to promote existing circular constructure courses and develop local programs.	High Redirects training opportunities toward circular industries and processes. Supports circular economic development.	N/A	S	L
6.4.2 Offer retraining programs for workers impacted by mill closures and transitions in legacy industries.	Medium Depends on availability of existing courses. Government could support through bursaries.	High Supports economic diversification and job opportunities aligned with a circular clean economy.	N/A	L	L
6.4.3 Promote training opportunities through high schools and community employment centres (e.g. waste characterization audits, deconstruction, etc.)	Medium Present at high school job fairs and workshops with employment centres about employment opportunities and circular business ideas.	High Builds general awareness about circular economy, as well as skilled labour pool to support local businesses entering the market.	S	S	L

6.4.4 Embed deconstruction/ circularity into trades curricula; deliver community workshops and contractor toolkits.	Medium Can leverage industry associations and workshops/toolkits and relatively low-cost and scalable.	Medium - High Builds long-term capacity by influencing how future tradespeople design, build, and deconstruct.	L	S	S
6.4.5 Support staffing and training for reuse facilities; recruit a yard manager role where throughput is expected to rise.	Medium Staff and training can be phased as volumes rise.	Medium - High Improves operational efficiency, safety, and material recovery rates. Improves long-term viability.	N/A	L	S

6.5 Technology & Innovation

Context: Traditional resources industries and solid waste sector have generally not leveraged technology and artificial intelligence to its full potential.

Opportunity: Emerging technologies and innovative approaches can improve material tracking, characterization, and processing, enabling higher recovery rates, more efficient circular economy practices across the region and economies of scale.

Actions	Effort	Impact	Who		
			Bus	Gov	NGO
6.5.1 Explore options for improving material sorting at municipal and private facilities.	Medium May require capital investment/funding depending on the innovation.	High Innovations in material sorting are key to achieving cost-effective diversion.	S	L	N/A
6.5.2 Develop inter-regional partnerships to manage complex material streams (e.g., construction plastics, glass, drywall, painted/engineered wood), harmonize standards, and reduce reliance on exporting materials.	Medium Collaborate on engaging with business and regional governments to generate economies of scale.	High Given modest material volumes in rural communities, consolidation is key to making circular strategies economically viable.	L	L	L

6.5.3 In partnership with Vancouver Island University (VIU), work with one/both campuses to test new innovations and technologies supporting CRD material extraction, processing and reuse.	Medium Bring VIU and local businesses together to forge an initiative like UBC's Multi-Material Resource Initiative.	High Innovation between local collaborators is best approach to support local circular solutions.	L	S	L
6.5.4 Pilot scheduled and shared island-haul routes to transport aggregated materials efficiently; explore public–private cost sharing.	Medium Requires coordination, scheduling and cost-sharing agreements. Builds on existing hauling routes and private operator capacity.	Medium - High Improves material aggregation efficiency across dispersed communities and reduces transportation costs. Strong potential to increase diversion if paired with hubs or reuse centres.	L	L	S
6.5.5 Invest in grading/testing pathways and applied R&D for recovered wood in engineered products; explore partnerships with manufacturers (e.g., fiber insulation).	Medium Requires partnerships with research institutes, testing bodies and manufacturers. Longer lead times and higher coordination. See 6.5.3.	High Enables wood to access high-value engineered end-markets and reduces reliance on low-value applications (e.g., biomass). Create pathways that can drive supply.	L	S	S

6.6 Policy & Governance

Context: Current policy aligns with a linear economic model, promoting extractive industries, incentivizing the use of virgin materials and subsidizing waste disposal.

Opportunity: Regulatory frameworks and incentives play pivotal roles in encouraging deconstruction, material recovery, and circular economy practices across CRD streams. Strategic policy interventions can stimulate markets for recovered materials send signals to industry.

Actions	Effort	Impact	Who		
			Bus	Gov	NGO
6.6.1 Require waste management plans for all new builds that include material tracking and diversion requirements. Public housing projects can lead by example.	Medium Adopt best practices of other municipalities requiring WMPs for new construction and major renovations.	High Provides data source for material use and construction waste generation. Builds industry awareness about their waste impacts and diversion options.	N/A	L	S
6.6.2 Require multiple deconstruction quotes before demolition: (e.g., "submit two deconstruction quotes or a written justification why deconstruction is not practicable).	Medium Can be implemented through permit process changes. Enforcement is administrative not technical.	Medium - High Encourages early adoption of deconstruction. Supports planning for future fee incentives or salvage targets.	S	L	N/A
6.6.3 Introduce refundable deconstruction deposits; add explicit homeowner incentives (e.g., rebates of ~$5,000 as suggested by industry).	Medium - High Requires bylaw or fee schedule amendments, but models exist in BC (e.g., Metro Van) and City of Victoria).	High Significant material diversion potential given age of housing stock and preservation of embodied carbon.	N/A	L	S
6.6.4 Introduce minimum recycled/reused content requirements in public project procurement.	Medium Requires municipal commitment and dispelling concerns about increased associated costs.	High Can stimulate market demand and signal support for circular industries and reduced GHG emissions on projects.	S	L	N/A

6.6.5 Offer financial and tax incentives (e.g., reduced property tax, financial top-ups and subsidies) to incentivize circular practices (e.g., relocating homes, deconstruction, use of salvaged materials in new construction). support material reuse. See Appendix D for a Home Relocation Case Study.	Medium Employ proven incentive programs offset by reduced municipal costs. (e.g. Building Reuse Grants).	High Proven catalyst to drive material diversion and commercial innovation.	N/A	L	S

7 Conclusion and Next Steps

The findings of this Regional Market Assessment demonstrate that the CVRD is at a pivotal moment in its transition toward a circular economy for construction, renovation, and demolition materials. Aging housing stock and ongoing renovations will continue to generate significant material flows. Without intervention, these waste streams remain a cost burden and environmental liability. However, with targeted and coordinated action, the findings suggest that they can become a source of economic opportunity and resilience for the region.

The analysis highlights three critical imperatives:

1. Prioritize sorting and separation source separation is one of the top levers for higher diversion and cleaner feedstocks.
2. Aggregate and store material volumes through circular hubs and exchanges to generate sufficient volumes to make transfers more economical, and processing on the island more feasible. Foster collaboration across the value chain to pilot and scale key materials.
3. Enable conditions for more deconstruction and scale diversion through policy reforms, infrastructure investment, and workforce development.

These priorities align with the Synergy Foundation's Circular Hubs Project, which aims to develop regional hubs that support collaboration, shared infrastructure, and capacity-building to accelerate the transition to a circular construction economy across British Columbia.

Next Steps for the CVRD

1. **Validation and Engagement:** Share this report with stakeholders and host a follow-up session to confirm priorities and identify early adopters for pilot projects.
2. **Pilot Implementation:** Advance near-term actions such as launching a free-store pilot with third-party operations and on-site denailing and material quality assurance.
3. **Policy Development:** Begin drafting deconstruction bylaws and implement proven incentives to stimulate material diversion practices.
4. **Funding and Partnerships:** Secure resources through programs like REDIP and FCM Green Municipal Fund to support infrastructure and workforce initiatives.
5. **Integration with Circular Hubs Network:** Position the CVRD as a leading region within the provincial Circular Hubs initiative, leveraging shared learning and scaling opportunities. Partner with the City of Victoria and Nanaimo to amplify diversion efforts.

By acting on these steps, the CVRD can transform CRD waste management from a challenge into a driver of sustainable growth, creating a resilient local economy while contributing to provincial and national climate goals.

Appendix A - Engagement Summary

The Material Market Assessment Study for Cowichan Valley Regional District (CVRD) involved extensive engagement through a variety of methods. Activities included development of a long list of key contributors in the community and broader region, a series of interviews, and a community session. This engagement took place between June and November of 2025, and results were used to inform the Market Assessment and the broader Synergy Foundation Circular Hubs project.

List of Key Contributors

The list included 27 organizations in the CVRD, and a total of 108 in the broader Vancouver Island-Coast Region. Organizations were categorized into the following groups to ensure a range of perspectives were captured.

- Local Government
- First Nation
- Business
- Industry Association
- NGO / Social Enterprise
- Artists / Entrepreneurs

Interviews

Interviews were conducted with six organizations within the CVRD, and four organizations serving the broader region. Whenever possible, questions were shared in advance and consent was acquired before recording. Interview notes and transcripts were analyzed and summarized as input into the research effort.

Interview questions were structured into the following themes:

- General Information
- Existing Practices
- Material Supply
- Infrastructure / Processing Capacity
- Material Demand
- Policy
- Gaps & Barriers
- Conclusion / Next Steps

Community Session

A Waste-to-Resource Community Session was held in Duncan on November 25, 2025, at the Duncan Garage Café & Bakery. The purpose of the session was to explore opportunities for reducing CRD waste and advance circular economy initiatives locally. The session focused on identifying suitable hub models, community assets and gaps, and potential economic opportunities. Participants engaged in facilitated discussions, shared insights, and proposed innovative solutions tailored to the region's unique needs.

Of the 23 people registered, 21 people attended representing the following groups:

- Other (other includes (retirees, associations, and employment services) - 3
- Policy/Government - 8
- Waste Hauler/Recycler - 1
- Artist/Furniture maker - 1
- Contractor/Builder - 7
- Reuse/Salvage - 1

All registrants and attendees of the workshop were asked to complete a short post-workshop survey to help inform future policy. Next steps from the sessions include the following:

- Host a validation session to share key insights from the community session, identify specific training opportunities, and establish material matchmaking connections in the community.
- Explore pilot projects and feasibility studies.
- Continue to build networks and material matchmaking opportunities.
- Ongoing community engagement.
- Provide training, BC Green Business and Green Trades certification and 1:1 support to businesses.
- Explore available grants for businesses and infrastructure.

Appendix B- Residential Deconstruction Case Study

Features

Year Built: 1929
Location: 3961 W 13th Ave. Vancouver, BC
Building Area: 3,037 sq ft.

Activity	Cost/ Savings ($)
Project Cost	61,000
Charitable Tax Receipts	-20,000
Net Cost	**41,000**

VEMA Deconstruction, based in Vancouver, recovers valuable materials that would otherwise be discarded, reducing landfill waste while providing affordable resources to the community. Their commitment extends beyond environmental responsibility, they create job opportunities and support local economies by donating salvaged items, such as appliances, cabinets, and furniture, to local organizations.

Material Composition

Material	Tonnes	%
Concrete/Plaster	52.2	43.9
Clean Wood (Recycled)	17.52	14.7
Clean Wood (Reused)	14.44	12.1
Brick/Tile	11.9	10
Garbage	11.3	9.5
Architectural Salvage*	5	4.2
Drywall	3.64	3.1
Asphalt Roof Shingles	1.7	1.4
Metal	1.3	1.1
Total	**119**	**100**

*Architectural salvage includes lumber, doors, windows, and cabinets.

90.5% **Recoverable material**

Deconstruction Timeline

1 Pre-Deconstruction

In Vancouver, a Recycling & Reuse Plan for Green Demolition & Wood Salvage is submitted with a demolition permit application if recycling/reuse minimums apply (houses built before 1950).


CREDIT: PETER COPPARD REAL ESTATE

2 Interior Deconstruction

Interior finishes and fixtures are carefully removed first, allowing materials such as cabinetry, doors, flooring, and lumber to be salvaged for reuse or recycling.


CREDIT: VEMA DECONSTRUCTION

3 Exterior Deconstruction

Exterior assemblies are methodically dismantled to protect salvageable materials and ensure proper separation of recyclable and reusable components.


CREDIT: VEMA DECONSTRUCTION

4 Material Diversion

Deconstructed materials are sent to recycling and reuse facilities. A Recycling & Reuse Compliance Report was submitted to the City of Vancouver to verify diversion. Salvaged materials for reuse (like the pictured lumber) are eligible for a higher diversion credit.


CREDIT: VEMA DECONSTRUCTION

Appendix C - Economic Analysis

The economic potential of CRD material recovery and reuse in the CVRD could be significant considering factors such as the proximity to large end markets and the added cost of shipping waste outside the region. Current disposal practices represent lost value that could be captured through improved diversion systems.

The economic impact highlighted in Section 5.4 was calculated using the below methodology.

Economic Impact Methodology

The economic value of salvaged materials was estimated by applying the following formula:

*(tonnes of recoverable material) * (economic multipliers) = impact to economy (GVA) and employment (jobs)*

Economic multipliers were adapted from provincial and national CRD waste diversion studies. Each community has unique characteristics that influence the specific impacts of CRD waste diversion, including the following factors:

- Quality and quantity of available materials
- Access to infrastructure, markets, and complementary industries
- Policies encouraging and mandating waste diversion

Table C1 summarizes secondary market values and tipping fees for common CRD material streams. [29]

[29] Data sources for Table C1 include: Arnts, Capital Regional District, Bings Creek depot, CBM, Comox Valley Regional District, Cowichan Valley Regional District, Ecowaste, Government of BC, Groupe Bellemare, Hartland, Madison, Meade Creek depot, MetroVan, Okon, Peerless Road Recycling Centre, RDN, Scrap Metal Trade, StatCan, Statista.

Table C1: Secondary market value by material type.

Material	Secondary Market Value per Tonne (CAD)	Primary Virgin Retail Value per Tonne	Tipping Fees in CVRD per tonne (2026)	Tipping Fee Range on Vancouver Island per Tonne[30]
Wood	$80–$155	$412–$508 (SPF lumber price)	$165 (clean/untreated) $242 (treated/painted)	$80–$265
Metal	$350–$550	$2,500 (Steel bar, retail)	$0	$0–$60
Concrete / Rubble	$9–$54 (recycled aggregate, concrete / brick)	$150–$180	$94	N/A–$60
Asphalt / Shingles	$110–$195 (recycled shingles)	$245–$333 (fresh asphalt)	N/A	$110–$155
Mixed CRD	$185–$365 (commingled /construction debris)	N/A (no direct retail comparator, treated as waste stream)	Not accepted	$110–$205

Table C2 provides economic multipliers associated with employment gains and gross value added (GVA) for primary material streams. This includes collecting, sorting, and preparing CRD materials for reuse or further processing, as well as some indirect economic activity ties to these actions.[31] This economic model reflects only a limited segment of the waste value chain. Additional opportunities exist to generate greater social, economic, and environmental benefits through value-added manufacturing.

[30] CRD tip fees from Comox Strathcona Waste Management, Capital Regional District (Hartland landfill) and Regional District of Nanaimo.
[31] Multipliers are adapted from the report: Economic & Environmental Assessment of Waste Diversion in Canada's Construction & Demolition Sector Study https://delphi.ca/wp-content/uploads/2024/09/CD-Waste-Diversion-in-Canada-Exec-Summary-Report-Sep-2024.pdf

Table C2: Economic multipliers by material type

Material	Employment per 1000 tonnes (Jobs)	Gross Value Added per tonne (CAD)
Wood	1.5	134
Concrete	0	5.3
Drywall	1.3	106
Metal	1.8	249

Applying economic multipliers to the CVRD's 2024 waste volumes illustrates the potential benefits of diversion.[32] Table C3 provides a baseline estimate for the economic output and GVA of waste diversion by material type.[33] The economic output reflects the midpoint of the secondary market value for each material stream.

Table C3: Potential economic impact of current CRD waste diversion in the CVRD.

Material	2024 Reported Volumes (tonnes)	Economic Output (CAD)	Employment (Jobs)	Gross Value Added (CAD)
Wood	7,853	903,095	11.8	1,052,302
Concrete	1,204	37,926	0	6,381
Drywall	2,066	-	2.7	218,996
Asphalt[34]	1,224	186,660	-	-
Metal	3,375	1,518,750	6.1	840,375

The figures presented in these tables represent a conservative baseline, reflecting available public data only. Comingled/mixed CRD materials (6,519 tonnes; Table *1*), likely contain significant volumes of recoverable materials if they were source separated.

[32] BC Ministry of Jobs, Economic Recovery and Innovation. 2022. BC Circular Economy & Construction Waste Study. Provided by Ministry Staff.
[33] Note that the economic impact estimates assume that each material stream is successfully diverted from landfill to reuse, recycling, or value-added manufacturing pathways.
[34] Economic impact of asphalt diversion is currently a data gap.

Appendix D - Home Relocation and Repurposing

One of the more innovative strategies that has emerged to address CRD waste is the relocation and repurposing of homes slated for demolition to rural and remote communities to provide affordable housing.

Renewal Development (Renewal) is a Vancouver-based company that has developed the Home Relocation and Renewal Model (HRRP) – a program to rescue, relocate, retrofit, and repurpose some of the 2,700 homes demolished in Metro Vancouver each year. HRRP transforms homes slated for demolition into affordable, climate-friendly housing for Indigenous and other communities in need. Guided by values of environmental stewardship, community integrity, affordability, and respectful partnership, Renewal delivers a circular, scalable alternative to conventional demolition and new construction.

Over the past three years, Renewal has delivered **32 units of affordable housing to four First Nations communities**, receiving recognition from CMHC through a $2.4 million Housing Supply Challenge grant, the Vancouver Board of Trade, and international profile at the Venice Biennale.

Financially, HRRP offers governments, First Nations, and developers a cost-effective alternative to demolition and new construction. Developers receive a cost-competitive, full-service program to prepare a site for development, while receiving reputational enhancing opportunities through association with home relocations. Relocated homes can be delivered at 15-30% less cost than equivalent new builds, an especially powerful advantage in remote or coastal communities where construction logistics make construction significantly more expensive.

In 2025, there was conservatively 22 residential demolition permits in the CVRD, and it is estimated that 20 per cent of homes are good quality homes that would be candidates for home relocation. On that basis, and if all permits resulted in demolitions, 4 homes could be relocated and retrofitted annually to provide affordable housing for Indigenous communities and non-profit housing associations, keeping more than 260 tonnes of CRD materials out of landfill each year. This potential could be significantly increased through inter-regional coordination and access to broader relocation, retrofit, and receiving-site capacity.