

Diversified Growth FOR SOFTWOOD LUMBER

2018 Softwood Lumber Board Annual Report

ICE Block 1, Sacramento, CA
Architect: RMW architecture + interiors
2.3 million board feet
Credit: RMW Architecture & Interiors, Bernard André Photography



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Washington Place, Revere, MA
Architect: Joseph Tatone & Associates
283,883 board feet
Credit: Greg Folkins



The Grove at Live Oak Bank, Wilmington, NC
Architect: LS3P Associates
981,333 board feet
Credit: Melva Calder

Growing the Future for Wood

The Softwood Lumber Board's (SLB) ability to increase the market demand for softwood lumber boosts industry ROI, maintains forests as forests, creates jobs and strengthens communities.

\$23.11 of revenue generated for every \$1 invested

into the SLB since 2012.

4 million cars off the road

The 4.8+ billion board feet generated by the SLB since its inception has sequestered carbon equal to taking 4 million cars off the road.

18-story wood buildings

The SLB support for the AWC has created opportunities for softwood lumber in taller wood buildings.

4.8+ billion board feet of new demand

since 2012, thanks to the SLB investments — 1.2 billion board feet in 2018 alone.

926 million influencers reached,

including architects, engineers, and developers, thanks to the SLB's Think Wood pro-wood communications program.

New market opportunities

Over 175 mass timber projects have been constructed in the U.S. with more than 300 currently in the design phase.

1,188 projects converted

in the U.S. in 2018, thanks to the collective impact of the SLB programs.

97,000+ hours of education taken by pros

The SLB CEUs kept architects, engineers, building officials, and developers consistently engaged in 2018.

3 new trees planted for every 1 harvested

Strong markets for lumber keep forests as forests.

35 jobs supported

for every 1 million board feet processed.

775,000+ jobs

The softwood lumber industry supports more than 775,000 direct and indirect jobs in harvesting and manufacturing.

Strong markets support communities

- 515 mills
- 470 communities
- 32 states

22.8% increase in purchase consideration

and 9.55% increase in purchase intent in response to the SLB's *Wood, Naturally* content.

Full Steam Ahead



Marc Brinkmeyer

Dear Industry Colleagues,

It's hard to believe that the Softwood Lumber Board (SLB) has been driving innovation and industry change for over six years. When we formed the SLB in 2012, we set the goal of getting wood to its rightful place in the

material-selection process – to be considered for all projects just like concrete and steel, not just single-family construction. We didn't focus much on self-promotion; instead, we rolled up our sleeves, launched several key initiatives, and got to work transforming the market for our products through diversification and innovation. Almost seven years later, we're looking back on our work with pride, having launched the mass timber movement and generated almost five billion board feet of incremental demand. Together, we've made tremendous strides to strengthen our industry, and I want to pause to say thank you – your ongoing commitment to growth has made this all possible.

“Almost seven years later, we're looking back on our work with pride, having launched the mass timber movement and generated almost five billion board feet of incremental demand.”

I'd also like to thank our former CEO, Steve Lovett, for his many contributions to the SLB from the very beginning. We began as a start-up seven years ago, and Steve's leadership allowed us to grow, transition, and transform into a mature organization. His leadership has been greatly valued, and we appreciate his care and consideration during his tenure as CEO. We wish you all the best in your retirement, Steve.

The year 2018 proved to be an incredibly productive year, with SLB-funded programs creating more

demand for softwood lumber than ever before. We are very proud of our ability to extend our reach each year, grow and protect our markets, and make many great strides forward for the industry.

As we look forward to our second term, the primary objective of the SLB—to increase the demand and use of softwood lumber—remains paramount. The SLB will continue to focus its investments on building codes, communications, and building conversions to wood, but we will reflect rapidly changing market conditions, emerging opportunities, supply chain dynamics, and competitor behavior in the coming years.

Our organization is dedicated to protecting and growing market share and increasing softwood lumber demand by promoting both its economic and environmental benefits. How specific opportunities are captured will evolve as the SLB works with programs to refine established tactics, identify new methods, and target decision-making audiences more aggressively. The result will minimize duplication, identify gaps, and ensure each SLB investment is optimized and focused on the organization's goals.

Every interaction drives our industry forward, toward a future built with softwood lumber. The SLB strives to be a strong advocate for the industry making softwood lumber the preferred material choice for the residential, non-residential, commercial, and industrial markets.

I am personally honored to have led the SLB. We've established so much already and proven that when we work together, we can achieve more than we ever thought possible. We will build on the momentum already established to propel us all toward a stronger industry.

Thank you for your continued support,

Marc Brinkmeyer, Chairman

Walter Huntington Apartments, Boston, MA
Architect: RODE Architects
362,743 board feet
Credit: Greg Folkins

SLB Investments
Continue to Increase
Demand

4.86+ Bbf

of new demand has
resulted from SLB
investments since 2012



Refocused and Ready for 2019



Don Kayne

Dear Industry Colleagues,

It's been quite the year for the SLB. As we button up our first term, we are incredibly proud of the great work we've been able to accomplish through our funded programs. By investing collectively,

we're able to maximize our impact and spread our message further than if we each acted alone. That's the real power of the SLB. In the past year, SLB-funded programs generated 1.244 billion board feet of incremental demand. This is a 224 million board foot increase over 2017. This past year alone, the SLB helped convert over 1,188 projects to wood construction. This brings the total SLB impact from 2012 through 2018 to over 4.863 billion board feet. This is no small feat, and it took strategic thinking, smart planning, and a cohesive effort across multiple channels to bring our goals to reality.

Code

The American Wood Council (AWC) recently led a successful industry effort seeking code recognition for taller mass timber buildings up to 18 stories for three new types of construction in the United States, setting fire safety requirements and allowable heights and areas for tall mass timber buildings. This outcome represents, in part, the efforts of the SLB, which alongside the AWC and the U.S. Endowment for Forestry and Communities, funded a multiyear initiative led by the AWC to generate new data to demonstrate the performance of tall mass timber structures, engage and educate code and fire officials, and ultimately gain acceptance for tall wood in building codes and standards.

Communications

In early 2018, **Think Wood** was successfully rebranded, driving increased communications to target and engage key influencer audiences. This effort created ample opportunity to educate and train professionals – providing resources, tools, and knowledge to specify buildings built out of wood, thereby needing less one-on-one support.

During 2018, **Wood, Naturally** defended U.S. market share by successfully reaching residential homeowners at purchase decision points through digital marketing strategies including social media, paid search, website, and influencer marketing.

In late 2018, the SLB began the merger of **Wood, Naturally** and **Think Wood**. This unified approach under the **Think Wood** brand will enable the SLB to reach key audiences through a single communications strategy, ensuring the industry's investments deliver the strongest results.

The SLB led the industry's combined effort at the International Builder Show, JLC Live New England, the Remodeling Show and Deck Expo, the American Institute of Architects Convention, and the Greenbuild trade shows via the Association Partnership Program's Wood Pavilion.

Conversion

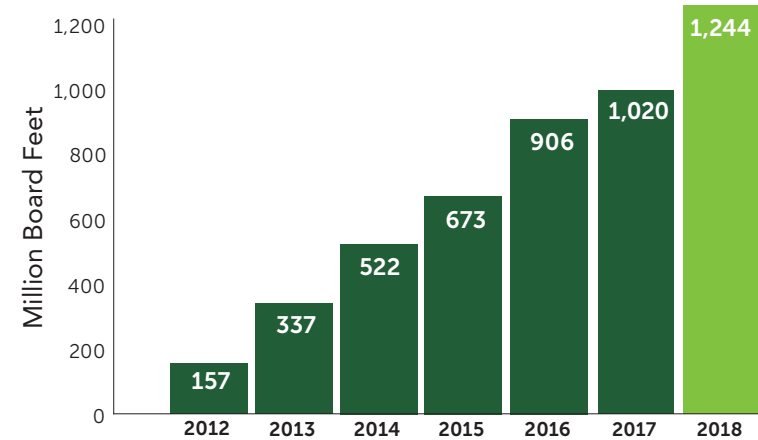
WoodWorks staff engaged over 3,300 industry individuals, which created 610 new influenced projects (these will be reported when they go to construction) and 310 directly influenced projects, resulting in 131.4 million board feet of consumption in 2018.

We are committed to delivering results that push our industry forward, and we've taken a close look at our efforts to ensure we're making the most of every opportunity. Our challenge is to adapt our programs

Patrons Oxford Insurance, Portland, ME
 Architect: Scott Simons Architects
 236,571 board feet
 Credit: Robert Benson



SLB Investment Creates Wood Demand



to reflect the shifting market conditions so we can maximize the returns and the value we create for the industry. Construction of single-family detached homes has traditionally been the largest source of softwood demand in North America, but demographic shifts and socioeconomic changes favor growth in multifamily construction.

To meet this challenge and at the direction of the Board of Directors, the SLB launched a comprehensive review of our funded programs in the fall of 2018. The goal of the review was to refine, align, and optimize the SLB's overall investment strategy and tactics, align

expenses with revenues, and ensure continued return on investment and added value for investors.

With these program shifts underway and a revitalized leadership strategy, we are positioned to increase our impact significantly in 2019 and beyond.

Don Kayne, Research and Promotion Programs Committee Chairman

AWC Led Industry Effort for Taller Wood Building Codes Proposals

With our sights set on increased adoption of wood-frame building, 2018 was a year of continued momentum for the American Wood Council (AWC).

Building on the strong foundation set in 2017, the AWC's 2021 Taller Wood Buildings Code Project (TWB) accomplished its goal of influencing changes in the 2021 International Code Council (ICC) building standards to recognize the construction of mass timber buildings up to 18 stories in height. This project is funded equally by the SLB, U.S. Endowment for Forestry and Communities, and the AWC.

For the past 100+ years, U.S. model building codes have consistently recognized four or five types of noncombustible construction and an equal number of combustible construction types. Types of construction are fundamental to the code and establish allowable building heights.

“It was the first time in the history of the modern building code that new construction types were added to the code.”

In late 2018, the Tall Wood Building Code proposals were approved to be included in the 2021 International Building Code (IBC). Among them were 14 code changes that introduce three new mass timber construction types (Type IV-A, IV-B, and IV-C) that allow for buildings of up to 18 stories. It was the first time in the history of the modern building code that new construction types were added to the code.

The AWC also made incredible progress in specific task areas including the following:

Physical Tests of Assemblies

- The AWC conducted tests on 14 high-strength wood-frame shear walls in 2018. Results for four- and five-story (mid-rise) wood-frame construction demonstrated approximately 25% larger peak strength in wood-frame shear walls than was used by several university models. These tests were conducted to update the overly conservative FEMA-funded studies on seismic modeling. The AWC will be looking to incorporate these findings into revised standards going forward.
- To date, two papers regarding these test results have already been accepted for publication in the American Society of Civil Engineers peer-reviewed journal, *ASCE Journal of Structural Engineering*.
- A third paper, published in *Structure Magazine*, clarifies new procedures of ASCE 7 16 for the design of wood-frame structures in high seismic-hazard areas, including application to multi-story wood frame over rigid podium structures.
- TR10 – Calculating the Fire Resistance of Wood Members and Assemblies was revised and released in October 2018 to address concerns raised by ICC's Tall Wood Building (TWB) Ad Hoc Committee.

Education and Outreach to Specifiers and Building Officials

- The AWC's education program reached over 22,000 building officials, engineers, and architects, with over 36,000 contact hours (6% increase over 2017 results).
- The AWC now has nearly 120 online courses available, 46 with NCSEA accreditation, 117 with ICC accreditation, and 109 with AIA accreditation.

Ariva 5, San Diego, CA
 Architect: KTG Architecture & Planning
 4 million board feet
 Credit: Brett Drury



2018 AWC By The Numbers:

712	Code Official Connections
1,238	Help Desk Responses
101	Universities Teaching Wood
1,534	Students Using AWC Standards
123	Education Events
22,284	Attendees at Education Events
36,233	Educational Hours Provided

Inspiring the Industry to “Think Wood”

The start of 2018 marked a major shift for our program as we transitioned the brand from reThink Wood to Think Wood. As the number of wood buildings being constructed in North America continues to increase, industry leaders are turning to softwood lumber products because of their versatility, performance, and aesthetic appeal.

With this growth, the Think Wood database is just shy of 60,000 contacts; this, combined with the ability to target and engage each of the key influencer audiences, creates significant opportunities to educate and train these professionals.

Alongside the brand transition came increased Think Wood communications, engagements, and continuing education unit (CEU) courses. Because design and construction professionals are searching for practical resources to assist them in specifying lumber-based building systems for their projects, Think Wood collaborated with industry influencers and champions to create engaging and useful content designed to help those who are ready to build with wood.

Improvements to the website and Research Library in 2017 and 2018 continue to provide positive impacts with increased traffic to ThinkWood.com. Over 8,500 design and construction professionals signed up for the Think Wood newsletter this past year, an impressive 328% increase year over year. With this growth, the Think Wood database is just shy of 60,000 contacts; this, combined with the ability to target and engage each of the key influencer audiences, creates significant

opportunities to educate and train these professionals. By providing the resources, tools, and knowledge needed to specify buildings built out of wood, we’ve reduced the need for one-on-one support.

Over 380 professionals (up 62% over the prior year) have requested support and information via the Think Wood website, a promising sign that we are making headway in this area. Increasingly, architects and engineers are seeking specific information as they determine how and if wood can be the solution in their projects.

In September 2018, the SLB merged the *Wood, Naturally* and Think Wood social media, public relations, and advertising efforts. Under the Think Wood brand, the newly combined program will continue to connect interior and exterior product information with residential contractors, builders, and remodelers. It will also engage architects, engineers, developers, and contractors to provide a seamless experience that highlights wood’s aesthetic appeal, structural application, and possibilities for indoor and outdoor use for both the residential and commercial segments.

In 2018, the Association Partnership Program and the Think Wood Pavilion were featured at the American Institute of Architects Convention in New York and the Greenbuild trade show in Chicago where industry associations as well as other SLB-funded programs showcased softwood lumber products to design and construction professionals. Think Wood and WoodWorks teamed up once again to represent the softwood lumber industry to developers at the Multifamily Executive Conference in Las Vegas.

Together, we’re helping drive engagement and specification of softwood lumber products for commercial and residential projects.



2018 Think Wood By The Numbers:

22,361	Educational Courses Taken
30,364	Resources Downloaded
926 Million	Earned and Social Media Reach
9,500	Podcast Listens
8,612	Prospects Shared
691,525	Digital Engagements
59,746	Think Wood Contacts Database

McDonalds Flagship, Chicago, IL
Architect: Ross Barney Architects
Credit: Ross Barney Architects

Tapping Into Influencers to Reach Homeowners

Wood, Naturally's objective and strategy was to defend U.S. residential market share by intercepting homeowners at the point of decision regarding building materials. *Wood, Naturally* drove residential purchase decisions in favor of softwood lumber by tapping into social media, website, search engine and influencer marketing to reach homeowners. *Wood, Naturally* saw tremendous success with campaigns across several channels, reaching 9.5 million engagements with homeowners over the course of the year.

The *Wood, Naturally* campaign exceeded 90% of year-end goals for key performance indicators by the end of October 2018 for impressions (94%) and engagements (95%). In addition, the campaign exceeded year-end goals for clicks to site from social (128%), clicks to site from search engines (204%), website visitors (112%), and referrals to associations up (134%).

- In 2018, the program drove 18,735 referrals to associations, exceeding the year-end goal of 14,000 by 134%.
- The social media campaign on Facebook and Pinterest continued to outperform those of competitors in social engagement.
- Content effectiveness surveys conducted in 2018 contributed to a 9.55% lift in net purchase intent and a 22.8% lift in net purchase consideration.

Wood, Naturally executed eight partnerships with top-tier contractors and designers who produced 23 blog posts, three videos, and high-quality photography for the campaign. This rich content demonstrated the many benefits of softwood lumber in residential projects. All the content was repurposed on *Wood, Naturally's* website and social channels and consistently drove the most social engagement of all posts each month.

Promoting Wood for Outdoor Living

- For the National Day of Unplugging influencers Jen Woodhouse, Serena Appiah, Rachel Pereira, and Krista Aasen each created a blog post on their "Top 5 Ways to Unplug" and described how wood's benefits help them to unplug. After a one-week period, the campaign achieved over 17,800 impressions and reached over 238,800 people.
- Jen Woodhouse created a blog post that compared wood over composite materials. The post drove 6,957 engagements on Facebook and was *Wood, Naturally's* top-engaging post in August.
- Brian Patrick Flynn created video, photo, and blog content on deck renovations. His promoted posts earned 657,000 views, 17,300 clicks, and 2,700 reactions, comments, and shares on social media.
- Ron Hazelton wrote five guest blog posts on various deck-building topics, resulting in 44,000 engagements, including reactions, comments, shares, and clicks on social media.
- Mark Clement also wrote three guest blog posts on deck-building, driving a total of 17,400 clicks back to the *Wood, Naturally* website.

The *Wood, Naturally* Wood Pavilion provided a unified softwood lumber industry presence in conjunction with industry associations at the International Builder Show in Orlando, Fla., JLC Live Northeast in Providence, JLC Live Northwest in Portland, Ore., and at the Remodeling Show and Deck Expo in Baltimore, Md.

2018 Wood, Naturally By The Numbers:

42.46 Million	Social Media Impressions
86,707	Website Visitors
9.47 Million	Engagement (Likes, Comments, Shares, Etc.)
18,735	Referrals to Lumber Industry Associations
9.55%	Purchase Intent Increase
22.8%	Net Purchase Consideration Increase

Credit: Brian Patrick Flynn

Consultation, Conversions, and Construction

In 2018, the WoodWorks team met all of its project goals, thanks to consistent focus on influencing and converting projects through all aspects of the program. Their continued efforts positioned wood as the preferred solution for all building types where it is allowed by code and supported innovative applications such as heavy/mass timber.

- Throughout 2018, the WoodWorks team had a total of 3,343 interactions, which created 610 new influenced projects (these will be reported when they go to construction) and 310 directly influenced projects, resulting in 131.4 million board feet of consumption last year.
- In Q4, the WoodWorks team worked on 125 new projects. These projects are at the very beginning of the project assistance funnel, and while they have a long road to being built, they are very promising. These projects include a 12-story mass timber building in Cleveland, Ohio, several multifamily projects in Sioux Falls, N.D.; Reno, Nev.; Portland, Ore., and Port St Lucie, Fla., multiple retail buildings in Dallas and a four-story office in Bozeman, Mont.
- Geographically, California and Texas continue to lead the United States, outpacing all markets in terms of project count. These two states generated more projects in 2018 than Massachusetts, Florida, North Carolina, Oregon, and Washington combined. These top seven markets are consistent with the five-year analysis on reported projects. While slight shifts occur each year, the top markets remain the same. Additionally, we've seen a regional trend of new project assistance being stronger for business occupancies, but the East region experiences stronger new project assistance for assembly occupancies.

The trend toward mass timber construction is no longer limited to the Pacific Northwest. Rather, the number of projects using mass timber is increasing across the United States. Additionally, there continues to be a national interest in taller wood-frame construction. These projects remain heavily focused on the multifamily industry, representing 51% of WoodWorks' new project assists, with an increasing number of projects in hotel/motel, business, and institutional industries. As we closed out 2018, WoodWorks was aware of 177 projects that have been constructed and 310 projects in which the design team is considering the use of mass timber.

There is also increasing interest for taller wood buildings; the number of assistance requests for buildings with five or more stories of wood framing is 28% of the overall requests.

2018 WoodWorks By The Numbers:

14.91 Million	Square Feet of Wood Project Construction (Direct and Indirect)
511 MMBF	Board Feet of Incremental Softwood Lumber Demand (Direct and Indirect)
\$235 Million	Incremental Lumber Value (Direct and Indirect)
310	Projects Converted
38,708	Education Hours
7,700	New Contacts



Cortland Westshore - Tampa, Fla.

Description: Type III, 5-over-1
Volume of lumber: 6.1 million board feet
Status: Under construction



The Soto - San Antonio, Texas

Description: Six stories, post-and-beam frame with DLT roof
Volume of lumber: 2.5 million board feet
Status: Under construction

Candlewood Suites Hotel – Fort Drum, N.Y.

Description: Five stories of CLT
Volume of lumber: 1.6 million board feet
Status: Under construction

Platte Fifteen – Denver, Colo.

Description: Four stories of mass timber over a podium
Volume of lumber: 2.3 million board feet
Status: Under construction

By and large, valuable conversations lead to both conversions and construction. WoodWorks continues to provide educational offerings that introduce new contacts to mass timber construction and communicate the design-assistance services WoodWorks provides.

Other accomplishments in 2018 include the following:

- 32,928 educational hours were delivered to 20,858 specifiers through 298 WoodWorks-hosted events,

and 5,780 educational hours were delivered through 60 third-party speaking engagements.

- The Q4 WoodWorks-hosted events introduced us to 988 new contacts and generated over 986 leads for the regional directors.
- 908 educational hours were delivered through 12 third-party speaking engagements.
- 12 webinars reached over 13,000 practitioners, with 1,245 contacts new to WoodWorks.

New Building Codes Enable Taller Mass Timber Construction

It's been an exciting year for mass timber—and with more cities looking to add diversity to their downtown districts without sacrificing structural integrity, many are turning to mass timber. New construction of mass timber high-rises will soon grace the skylines of cities in Washington, Oregon, and California. This is the tipping point. The opportunities for mass timber construction will continue to increase in the years to come.

Changes to the International Building Code (IBC) have made mass timber construction more accessible than ever before. These changes would not have been possible without multiyear funding from the SLB and the U.S. Endowment for Forestry and Communities (USE) to generate new data to demonstrate the performance of tall mass timber structures, engage and educate code and fire officials, and ultimately gain acceptance for tall wood in building codes and standards.

After two years of arduous research and testing on mass timber's ability to withstand fire, blasts, and seismic activity, 14 code change proposals were submitted to the International Code Council (ICC), reviewed, shared with the public, and discussed in detail.

The American Wood Council (AWC) worked to propose code changes for the 2021 IBC that recognize the construction of buildings up to 18 stories in height.

In 2018, all 14 change proposals were recommended for approval (some with modifications) by all ICC review committees and approved at the ICC Public Comment Hearings as well as via cdpAccess, the governmental online consensus vote.

The addition of tall mass timber to the IBC provides a comprehensive set of safety standards for these new types of construction. This vote caps off several years

of scientific research and testing and verifies that mass timber meets the robust performance standards called for by our nation's building codes.

This represents an incredible win for the future of mass timber construction and makes building tall buildings with wood a strong, low-carbon alternative to traditional materials used by the building and construction industry.

The 2021 IBC codes will allow three new types of tall wood construction, which set fire-safety requirements as well as allowable heights, areas, and number of stories for tall mass timber buildings. The 2021 IBC will include the following:

- **Type IV-A** – Maximum 18 stories, with gypsum wallboard on all mass timber elements.
- **Type IV-B** – Maximum 12 stories, limited area of exposed mass timber walls and ceilings allowed.
- **Type IV-C** – Maximum nine (9) stories, all exposed mass timber designed for a two-hour fire resistance.

Shortly after these types of tall wood construction were announced, several states laid the groundwork to adopt these new codes. States on the Pacific coast have already begun to incorporate more tall wood construction, and we anticipate several other regions to follow suit.

The California Government Operations Agency (GovOps), aided by WoodWorks, recently announced a mass timber building competition and will award \$500,000 to teams presenting viable and repeatable mass timber solutions for commercial and multifamily projects in California. This kind of energy and excitement is exactly what our industry needs to keep the mass timber momentum moving in an upward direction.

T3 West Midtown, Atlanta, GA
Architect: RODE Architects
Credit: StructureCraft



Shifting Perspectives: The Future Is Modular

Industrywide labor shortages are not a new challenge. Experienced trades workers continue to retire, while across all industries, recruitment of the next generation dwindles. The Industrialized Wood-Based Construction Conference reports that the U.S. homebuilding workforce has a shortage of 200,000 skilled workers.

Very few of those entering the workforce today are interested in this important type of work. But construction is always in demand, despite a shrinking workforce. With fewer bodies available to complete the work, something has to change.

And that change has been growing in popularity over the past decade as modular construction makes a powerful comeback to the U.S. market.

We're not talking about cheap, 1960s-style row houses. We're talking beautiful, high-quality, customizable options for residential and commercial markets that have been constructed mostly offsite.

“Modular construction creates opportunities for precision accuracy,” said Gerry McCaughey, Chairman and CEO of Entekra at the Industrialized Wood-Based Construction Conference. “In terms of quality, it is physically impossible for a person on a building site to reach the same level of accuracy that you can get off offsite production lines.”

Lower construction costs, shortened timelines, automation, energy efficiency, recycling opportunities, and improved waste management all factor in to make modular construction faster, even with fewer skilled laborers.

Offsite, modular construction has already proven effective in the multifamily, commercial, and retail markets—and we believe this trend will translate well into single-family and small multifamily housing (i.e., townhome, quad-, and six-plex) construction. This will be especially important as more people move into already crowded urban areas. Flexibility in design and visual appeal means builders can get more creative to meet the varying needs of multigenerational buyers.

“Offsite construction is about design, engineering, and thinking upfront about how to build a building efficiently,” continued McCaughey. “It’s simply the most modern and logical way to build.”

The possibilities for offsite construction go beyond residential markets, creating more opportunities for wood in different industries. Many projects in commercial construction, industrial, health care, education, hospitality, and data center construction have used offsite modular construction to decrease costs while reducing project schedules and construction timelines.

The SLB’s funded programs are designed to share the benefits of softwood lumber for a wide range of construction projects, and as more builders embrace modular construction, we will continue to demonstrate the competitive advantages and opportunities for softwood lumber in this space.

Credit: Think Wood



Protecting and Expanding Softwood Lumber Markets

The Situation

As our population grows, the need to provide safe, adequate housing in a wide variety of price ranges increases. Multifamily properties are getting taller to accommodate this need, creating a great opportunity to showcase the many qualities of wood as a primary structural material in place of steel or concrete. One multifamily property start uses only one-third the amount of wood as a single-family start due to smaller unit size and efficiencies of scale, and while this decreases lumber consumption, the use of wood will grow as more states adopt tall wood construction.

Competitive pressure in the outdoor residential market continues to build as composite decking manufacturers increase marketing and advertising budgets to grow additional share in the wood segment. While this shift poses challenges for the wood market, profiles of wood-construction projects help to keep wood top of mind for consumers.

The Challenge

With every strategic SLB initiative, we are shifting the industry's perspective to showcase wood as a favorable option for appearance and structural applications, indoors and outdoors, in all segments within the residential and commercial construction and design verticals.

Our Priorities

Through our work in codes, communications, conversions, and innovation, we're moving the needle. Our funded programs tackle specific challenges to increase awareness of the economic, social, and environmental benefits of building with softwood lumber products.

We know that wood is sustainable, safe, and cost-effective. It's a renewable natural resource that translates beautifully into any project. Our programs are increasing awareness and reaching designers, developers, and

contractors before they make purchase decisions or commit to using other materials.

The SLB's priorities include the following:

- Protecting the current share in established market segments and newer ones.
- Prioritizing project conversions in the one- to four-story (non-residential), five- and six-story, and seven- to 12-story segments.
- Supporting and promoting innovative buildings that showcase the capacity of wood construction.
- Expanding market acceptance and use of lumber-based mass timber construction in larger and taller buildings.

Our Actions

Codes - The AWC protects and increases the use of wood by assuring the broad acceptance of wood products in the marketplace and developing standards, design tools, and guidelines for wood construction. The SLB will continue to focus on ICC code adoption at the local and state levels.

Communications - The recently unified Think Wood and *Wood, Naturally* programs underneath the Think Wood brand leverage a single set of communications channels and best-in-class expertise to highlight the benefits of wood with a specific focus on increasing the intent to specify wood buildings one to nine stories tall by promoting performance and cost data to priority professional decision-makers.

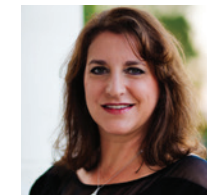
Conversions - WoodWorks leads the effort to convert projects that have been specified in concrete or steel to wood. As interest in mass timber grows, WoodWorks provides insights and guidance to architects and engineers who lack the knowledge or experience to use wood products. Equally important, WoodWorks will also address the knowledge gap for installers who have little awareness or understanding of mass timber construction.

SLB Board of Directors

U.S. South



Furman Brodie
Charles Ingram Lumber Co.
Vice President



Caroline Dauzat
Rex Lumber
Owner



Jack Jordan*
Jordan Lumber & Supply
Executive Vice President



Fritz Mason*
Georgia Pacific
Vice President & General Manager

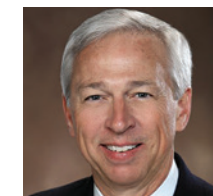


Danny White
TR Miller Mill Co.
President & CEO



Vacant Seat

U.S. West



Adrian Blocker
Weyerhaeuser
Senior Vice President



Marc Brinkmeyer*
Idaho Forest Group
Chairman



Eric Cremers
PotlatchDeltic
President & COO



Chuck Roady
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Vice President & General Manager



Steve Zika*
Hampton Affiliates
President & CEO



Alden Robbins*
Robbins Lumber
Vice President & Sales Manager

U.S. Northeast & Great Lakes States

Canada West



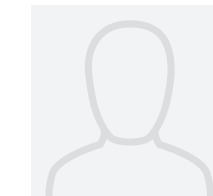
Ted Seraphim
West Fraser Timber Co.
President & CEO



Don Kayne*
Canfor
President & CEO



Don Demens
Western Forest Products
President & CEO



Vacant Seat



Hughes Simon
Barrette Wood
President



Vacant Seat

Canada East

Overseas



Francisco Figueroa
Arauco Chile
Commercial Director

*2018 Executive Committee Members



Softwood Lumber Board
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info@softwoodlumberboard.org

Cover Credit

ICE Block 1, Sacramento, CA
Architect: RMW architecture + interiors
2.3 million board feet
Credit: RMW Architecture & Interiors, Bernard André Photography