

# 2022 Q3 NEWSLETTER

SOFTWOOD LUMBER BOARD

**S|L|B**<sup>®</sup>  
SOFTWOOD  
LUMBER BOARD



Southfield Park 35 Warehouse  
PDMS Group | Timberlab  
Photo Credit: Erika Brown Edwards

## PROGRAM PARTNERSHIPS PROMOTE MORE WOOD BUILDINGS

The SLB relies on effective collaboration with and among its program partners and industry associations to expand softwood lumber's market share while avoiding duplication of effort. Recent examples of how the SLB and its partners advance wood together include:

- Think Wood and WoodWorks work seamlessly and sequentially to nurture leads and convert projects to wood. Both produce high-quality, complementary content to educate AEC professionals about the benefits of wood construction and overlay analytics to identify and steward leads. So far this year, Think Wood and WoodWorks have collaborated to convert 19 new projects. There are 174 active projects in the Think Wood/WoodWorks pipeline.
- Through joint outreach, WoodWorks and the AWC helped the city of Baltimore agree to allow tall mass timber projects per the 2021 IBC and in advance of updating their code. This change opens the door for new project conversions from steel/concrete to mass timber.
- The SLB and program partners complement the [Carbon Leadership Forum](#) and [Building Transparency](#) to strengthen wood's position as a recognized leader on carbon and sustainability for the built environment. Historically, the industry avoided these topics, but as the focus on material sustainability and carbon accounting increases, the SLB is leveraging partners' expertise regarding data (AWC), communications (Think Wood), and technical support (WoodWorks) to enhance wood's carbon story and comparative carbon advantage.
- Capitalizing on opportunities created by new federal investment to buy/build clean, the AWC and WoodWorks helped the U.S. General Services Administration integrate whole building life cycle assessments (WBLCAs) into its design processes to decarbonize federal properties—a significant outcome for the wood industry based on the size of the government's portfolio.
- The SLB, Think Wood, and the AWC have increased engagement with the [Energy & Environmental Building Alliance \(EEBA\)](#) to push for resilient, zero-carbon homes. Think Wood is an EEBA sponsor; the SLB funded a new professional designation for net-zero builders; and the AWC provides education about sustainable forestry.

These internal and external collaborations are helping the SLB make gains in the market, increase impact, and maximize return on investment.

# Q3 HIGHLIGHTS

INCREMENTAL DEMAND GENERATED

Q3: **466 MBF**  
YTD: **1.479 BBF**

THE CARBON BENEFIT (IN METRIC TONS OF  
CO<sub>2</sub> EMISSIONS) FOR REPORTED PROJECTS

Q3: **1.2 MILLION**  
YTD: **3.9 MILLION**



Chiles House | Portland, OR  
All Hands Architecture | Catholic Charities of Oregon and Sister City  
Photo Credit: Truebeck Construction

*Projects such as this supportive housing complex (which uses 21.4 board feet per square foot) have been converted to wood construction through collaborative nurturing efforts by Think Wood and project support from WoodWorks.*

## THE AWC ADDS SUSTAINABILITY EXPERTISE

The AWC recently hired two sustainability experts to join Rachael Jamison, VP of Markets & Sustainability, in [positioning wood as the leading solution](#) to decarbonize the built environment. Jeff Bradley joined as Director, Sustainability Standards, and will track and position wood within ISO, ASTM, LCA, and circularity standards, as well as in green building certification systems. Anna Ostrander joined as LCA Data Specialist, in partnership with USDA's Forest Products Laboratory, and will lead the Life Cycle Inventory and Analysis database project to demonstrate wood's carbon and sustainability impact and enable more environmental product declaration development.

## THE AWC HELPS ENACT CODE CHANGE THAT REDUCES MASS TIMBER CONSTRUCTION COSTS

The AWC delivered an important win for the industry in successfully advancing a 2024 I-Code change to allow for 100% exposed mass timber ceilings in Type IV-B construction, up from 20%. This change eliminates the need to cover ceiling areas with gypsum board and will translate into cost and carbon savings. The code change enhances wood's value proposition, particularly in the seven- to 12-story segment. WoodWorks is also seeing a large uptick in tall mass timber assistance requests. WoodWorks began assisting on 21 new tall mass timber projects in Q3, bringing the number to 70 for 2022, and the total overall to 180.

PROJECTED INCREMENTAL LUMBER DEMAND  
BY 2035 IN 7-12 STORY BUILDINGS

**140 MBF IN MULTIFAMILY**

AND

**22 MBF IN NONRESIDENTIAL**

ACCORDING TO FOREST ECONOMIC ADVISORS.

Robert Libke Public Safety Building | Oregon City, OR  
FFA Architecture and Interiors, Inc.  
Photo Credit: Christian Columbres



*With the code change, Type IV-B construction can now benefit from the exposed wood ceilings allowed in other types of mass timber construction, such as the building shown.*

## THINK WOOD DEBUTS ONLINE RESOURCE LIBRARY FOCUSED ON WOOD'S SUSTAINABILITY

Industry education remains Think Wood's most effective tool to encourage architects, developers, engineers, and residential contractors to choose wood. Think Wood is finding significant traction with content that stresses wood's sustainable, carbon-storing benefits and, in response, has launched a new [Sustainable Building Resources library](#) on its website. The easily searchable portal offers high-level and in-depth educational resources—everything from infographics to white papers—to support AEC industry professionals in building their knowledge of the sustainable benefits of wood. Think Wood will add content regularly to ensure the library remains an active resource that ultimately informs market opportunities for wood.

## SPONSORSHIPS AND MEDIA PARTNERSHIPS DRIVE GROWTH IN THINK WOOD LEADS

Media partnerships and event sponsorships targeting AEC practitioners were the top sources of new Think Wood contacts in Q3, bringing in 3,250 new contacts. These efforts included providing content on wood's performance and sustainability benefits at in-person and [virtual events](#) hosted by *The Architect's Newspaper* in partnership with WoodWorks and the AWC; sponsoring the National Institute of Building Sciences' annual multifamily research project that targets hard-to-access developers; co-hosting a [webinar](#) with *Architectural Record* on off-site construction, which led to over 1,150 CEU course completions; and participating in an EEBA conference, which unlocked new contacts in the residential segment.

THINK WOOD LEAD NURTURING EFFORTS LED TO  
**89 SQLS IN Q3.**

39 REPORTED THINK WOOD PROJECTS YTD REPRESENT  
**86.2 MBF** OF LUMBER.

*The Sustainable Building Resources library and media integrations help educate AEC practitioners on how existing wood products and sustainable forestry can help make a greener built environment.*

## WOODWORKS HELPS ARCHITECT ACHIEVE FIRST LIGHT-FRAME HYBRID

Process Architecture has long accessed WoodWorks and Think Wood resources, including CEUs and the Mass Timber Design Manual. When designing the 36,000-square-foot Isabelle Terrace Apartments in Oregon, Process contacted WoodWorks to explore mass timber to maximize the small project site. WoodWorks' inputs on codes, construction types, and CLT made the difference—[Isabelle Terrace](#) consists of light-frame walls, mass timber floors and ceilings, and a concrete podium, and it will consume an estimated 480,000 board feet of softwood lumber (13.3 board feet per square foot).



A combination of nurturing efforts from Think Wood and technical support from WoodWorks helped convert this project to a hybrid light-frame, mass timber, and concrete structure.



Isabelle Terrace Apartments | Hillsboro, OR  
Photo Credit: Process Architecture

## WOODWORKS HELPS UNCOVER, CLOSE RESEARCH GAPS FOR MASS TIMBER MARKET DEVELOPMENT

WoodWorks and USDA's Forest Products Laboratory recently hosted the [2022 International Mass Timber Research Needs Workshop](#), attracting 127 researchers, manufacturers, and AEC community members. The workshop touched on key interdisciplinary issues affecting mass timber development, including durability and building physics, structural system design, materials and manufacturing processes, sustainability, and economic analyses. WoodWorks is now collating and integrating workshop results into the design and evaluation of future research and funding proposals, helping to ensure that it and partnering AEC industry experts are well positioned to convert projects from steel or concrete to wood.

## STUDENT DESIGN COMPETITION ENVISIONS SUSTAINABLE WOODEN CITIES

Eight teams, [representing six different architecture programs](#), were recently named winners of the [TIMBER IN THE CITY 4: Urban Habitats Competition](#), in which students created wood-based solutions for real-world design challenges. This year, they designed mid-rise, mixed-use complexes comprising short-stay housing, a community wellness facility, and an urban marketplace, all connected to a new urban transit center in midtown Atlanta. The SLB sponsored this year's competition—in its fourth annual iteration—in partnership with the [Association of Collegiate Schools of Architecture](#), the [Georgia Institute of Technology](#), and the [Kendeda Building for Innovative Sustainable Design](#) (the BSLC sponsored prior iterations). This year's competition received 146 entries from over 600 participants showcasing the sustainability and economic benefits of building with wood. The sheer number of entries is a clear testament to rising interest and enthusiasm among future practitioners for innovative, sustainable wood design. The SLB will be sponsoring the competition again in 2023. View the winning entries [here](#).

THIS YEAR'S COMPETITION  
RECEIVED OVER  
**146 ENTRIES**

FROM 600 PARTICIPANTS  
AT 40 SCHOOLS.



*One of the winning submissions "Spatial/Material Speculations: Timber," was designed by City College of New York student Ahmed Helal with support from faculty sponsor Viren Brahmhatt.*

## THE SLB & CTBUH TO LAUNCH NEW TALL WOOD EXHIBIT TO BUILD AWARENESS ON THE FUTURE OF WOOD

The SLB and the Council on Tall Buildings and Urban Habitat ([CTBUH](#)) will unveil a major exhibit on tall timber in April 2023 at the Skyscraper Gallery in the Chicago Architecture Center ([CAC](#)). The CAC is the country's leading architecture center, reaching upward of 500,000 people annually. Drawing on innovative projects and technologies from across the United States and globally, the exhibit will showcase to the public the many essential benefits accrued to people and nature when constructing buildings—and entire cities—with high-performing, sustainable mass timber products.

The new tall timber exhibit is the SLB's latest effort to educate and inspire professional and general audiences about the future of wood. The exhibit also expands our ongoing, five-year collaboration with CTBUH to increase the global market for tall, sustainable mass timber and [hybrid-structure buildings](#).

## MARKET FORECAST STRESSES OPPORTUNITIES FOR INCREMENTAL GROWTH IN NEW SECTORS

Reverberations from the pandemic have changed the construction outlook in key market segments, with an impact on long-term lumber demand, according to FEA's new 2023 softwood lumber markets forecast.

The forecast anticipates 4.21 BBF of incremental lumber consumption by 2035—nearly half of which is anticipated to come from nonresidential sectors, and nearly 30% of which is expected to be in mass timber. Office and bank buildings and education buildings continue to offer the most long-term potential for both light-frame construction and mass timber construction in the nonresidential segment, but warehouses are a fast-growing category that should be scrutinized for wood design opportunities. The report projects increased volumes for light-frame multifamily projects up to 6 stories, with more potential growth for mass timber in the 7-8 story category.

To support market growth, FEA's report states that continuing training and education of contractors, trades, and the AEC community about wood design and construction is key to achieving long-term growth. It also claims that producing science-based knowledge about wood's performance and keeping up with demand for mass timber are critical for overcoming perceived challenges of wood design.

The SLB commissions forecast data annually to support its programs and investors in tracking and capitalizing on the latest market opportunities. The full report is available to SLB investors by emailing [info@softwoodlumberboard.org](mailto:info@softwoodlumberboard.org).



[www.softwoodlumberboard.org](http://www.softwoodlumberboard.org)  
[info@softwoodlumberboard.org](mailto:info@softwoodlumberboard.org)

A rendering of the planned tall timber exhibit at the CAC shows that models, photographs, and diagrams of projects will be on display.