

Forestry Innovation Investment®

FORESTRY INNOVATION INVESTMENT

YEAR IN REVIEW

2023/24

Tsawwassen Youth Centre

The Tsawwassen First Nation Youth Centre is a place where youth can have fun, learn new skills and connect to their language and culture.

This award-winning, two-storey building highlights Coast Salish culture with western red cedar logs in its post-and-beam structure and carved welcome poles. The design optimizes the strength and acoustic properties of hem-fir dowel-laminated timber in the wall, roof and flooring panels which are mostly left exposed inside the building. Exposed wood elements create the feeling of being connected to nature, bringing warmth and positivity to the space.

To learn more about this project and the many other innovative wood buildings across B.C., visit naturallywood.com/projects.



CONTENT

— YEAR IN REVIEW 2023/24 —

4	MESSAGE FROM THE MINISTER
5	MESSAGE FROM THE CEO
6	ABOUT FORESTRY INNOVATION INVESTMENT
7	PARTNERS IN MARKET DEVELOPMENT
8	BRITISH COLUMBIA
24	UNITED STATES
36	JAPAN
46	SOUTH KOREA
54	CHINA
66	INDIA
80	VIETNAM
90	INDUSTRY RESOURCES



Message from the Minister

In British Columbia, forestry is and will remain a foundation of our economy. But there's no doubt that the industry is facing real challenges—from low market prices in Canada and the U.S., to the end of the beetle kill harvest and unprecedented wildfires.

British Columbians expect that we get the most value from our natural resources while better sharing the benefits of our forests with communities and workers. That's why we are working in close partnership with First Nations, communities and the sector to take better care of our forests, and support good jobs for people.

At a time when forestry dependent communities need support, we are taking action to provide new job opportunities and making investments in local economies through the \$180 million BC Manufacturing Jobs Fund helping companies retool to more innovative value-added production practices to protect and create jobs for people. We are catalyzing the growth of the mass timber sector through the Mass Timber Action Plan. B.C. has become a world leader in this new stronger, cleaner, efficient building technology, and we're seeing it create good jobs for people in our forestry, manufacturing and construction industries.

Realizing the potential of our forests is only possible with access to global markets, as approximately 90 percent of provincial forestry output is sold outside B.C. Protecting the many thousands of jobs in the B.C. forest economy means keeping export markets open. The softwood lumber dispute with the United States continues to impact exports to that market, so we are diversifying our wood exports to provide greater market stability. Through offices in Japan, China, South Korea, India, and Vietnam we are building a strong reputation for exported B.C. wood, making the work of Forestry Innovation Investment (FII) and its industry partners a cornerstone of provincial forestry and economic policy.

In marketing B.C. forest products globally, we are demonstrating that our forests are not simply a resource; they are part of the global climate solution. Using wood from sustainably managed forests helps to reduce carbon emissions. Through a management framework based on environmental, social and governance (ESG) values, the Province, First Nations and industry are showing that our forest management is a testament to responsible leadership.

This journey also means we have to work together—First Nations, communities, industry and workers. Working through the Value-Added Accelerators, we are making strong connections between B.C.'s value-added firms and Indigenous communities. These partnership opportunities honour tradition, respect land, and foster growth that lifts all boats.

I look forward to FII continuing its mandate of advancing wood use, both domestically and internationally. Leveraging B.C.'s strengths to create good jobs and opportunities in every community will help more people build a good life in B.C., while strengthening B.C.'s diverse economy. Together we can support sustainable forest practices, strong communities, technological innovation, and a sustainable future.

A stylized, handwritten signature in white ink, appearing to read 'Brenda Bailey'.

Honourable Brenda Bailey

Minister of Jobs, Economic Development and Innovation | Government of British Columbia



Message from the CEO

Slowing economic growth in major markets and the effects of higher interest rates on construction activity created demand headwinds for B.C. forestry exports over the past year. The resulting low prices and a range of other factors made for a challenging year for the sector.

Climate change presents a global challenge, with impacts felt both at home and around the world. With our trade association partners, we continue to drive home the message in foreign markets that B.C. forest products meet the highest environmental standards and offer a climate friendly solution.

Markets across Asia and around the world are increasingly demanding wood from certified sources, an advantage that B.C. offers. With more certified forests than all of the United States, or Sweden and Finland combined¹, we can be proud of B.C.'s role as a global leader in sustainable forest management. A recent study found that 96 percent of global forest product buyers surveyed felt that choosing B.C. forest products is a good choice for the environment.

Work continues to expand the use of engineered wood and mass timber building systems, while promoting the development of the value-added sector. FII works closely with a range of industry associations and research institutions, and collaborates closely with B.C.'s Office of Mass Timber Implementation. B.C. is changing building codes to allow wood buildings of up to 18 storeys, while developing the capacity of the construction sector to design and build taller with wood. FII continues to manage B.C.'s Mass Timber Demonstration Program. The first four projects are now nearing completion, and FII is working closely with the design and construction teams to document and share lessons learned.

FII remains focused on key markets in North America and Asia. B.C.'s Minister of Forests led a major forest sector delegation to Japan in late 2023, to reinforce B.C.'s commitment to the market and to explore future potential for B.C. companies. The Minister was joined by the largest First Nations delegation to date on these missions, where examples of joint stewardship models and new relationships with the sector were shared.

Across all activities, we remain committed to advancing reconciliation and the diverse needs of staff and stakeholders. We have created our first Accessibility Plan as part of our progress towards greater equity and inclusion. We also continue to review the status of our diversity, equity and inclusion (DEI) efforts to ensure DEI principles are incorporated into our activities.

In this report you will see examples of the important work that FII and its many partners are advancing for the sector. We appreciate the collaborative approach taken by the sector and welcome any feedback on this work.

Michael Loseth
President & CEO | Forestry Innovation Investment

¹ www.certificationcanada.org (2023) | www.fsc.org (2023) | www.pefc.org (2023) | Double Certification FSC and PEFC-Estimations (2022)



Forestry Innovation Investment

Strengthening and diversifying markets
for B.C. forest products

Forestry Innovation Investment (FII) is British Columbia's market development agency for forest products. As a Crown corporation, we help maintain, create and diversify markets for B.C. forest products to ensure the forest sector continues to be a key contributor to the provincial economy.

FII works in collaboration with the forest industry, research institutions, the federal government, B.C. government, Indigenous organizations and other stakeholders to deliver innovative, forward-looking programming that responds to today's market dynamics as well as tomorrow's challenges and opportunities. We do this by delivering and co-funding a mix of research and capacity building, as well as market development and promotional activities.

For more information on FII, visit bcfii.ca

FII acknowledges and appreciates the opportunity to live, learn and work in the traditional territories of the xʷməθkʷəy̓əm (Musqueam), səliłwətał (Tsleil-Waututh), and Skwxwú7mesh (Squamish) Nations.

Partners in Market Development

Working together to deliver innovative programs in B.C. and around the world

\$1=\$3.62

Every dollar invested by FII is supported by an additional \$2.62 in funding from industry and other partners. This year, FII's \$6.86 million investment in cost-shared programming was leveraged with partner contributions to deliver a total market diversification program of \$24.82 million.

FII works collaboratively with government, industry partners and other stakeholders to deliver programs that support the growth and development of the provincial forest sector.

Through coordinating efforts and drawing on resources and expertise from different segments of the industry and government, FII is able to maximize the effectiveness of its programs and distinguish B.C. as a leader in innovation and market development.



National Research Council Canada

Conseil national de recherches Canada



Natural Resources Canada

Ressources naturelles Canada



Global Affairs Canada

Affaires mondiales Canada



British Columbia

In British Columbia, the goal of FII's market outreach and domestic market development programs is to showcase B.C.'s forest management and wood building innovation to the world. The Wood First program supports expertise and capacity building, particularly in relation to advanced wood building systems including taller buildings and mass timber. Market outreach communications enable better understanding of how B.C. sustains its natural forests using science and involving communities.

L'Alliance Française | Photo: Arkitek Creative, courtesy naturallywood.com

Communications

Developed by FII, naturally:wood is an information resource showcasing British Columbia as a global leader in wood construction and a supplier of quality, environmentally responsible wood products from sustainably managed forests. Architects, builders, designers, engineers, owners, and wood product buyers gain access to credible, fact-based information about B.C.'s diverse and innovative forest products, advanced wood building systems, and the province's evolving sustainable forest management practices. To highlight these benefits and showcase innovation, naturally:wood curates a wide variety of online resources, including technical tools, guides, research reports, project profiles, and case studies.

Reaching target audiences

Naturally:wood targets key influencers in building procurement and construction through an integrated communication strategy that includes social media, trade events, digital media and advertising.

Discover

3.5 million
impressions
452K pageviews
(up 15% YOY)

Engage

25K engagements
with content (up 114% YOY)

Grow

25.1K clicks
partner and industry websites
(up 7.6% YOY)

A biannual survey of global forest product buyers conducted by naturally:wood highlighted:

96 percent agreed that B.C. wood was a sustainable choice for the environment

Canada remains the TOP CHOICE for forest products

ALMOST 9 IN 10 buyers said they are likely to purchase forest products from Canada in the near future



Watch: *Before & After: A Mid-Century Modern, West Coast Home Gets A Stunning Renovation (Part 1 of 2)*

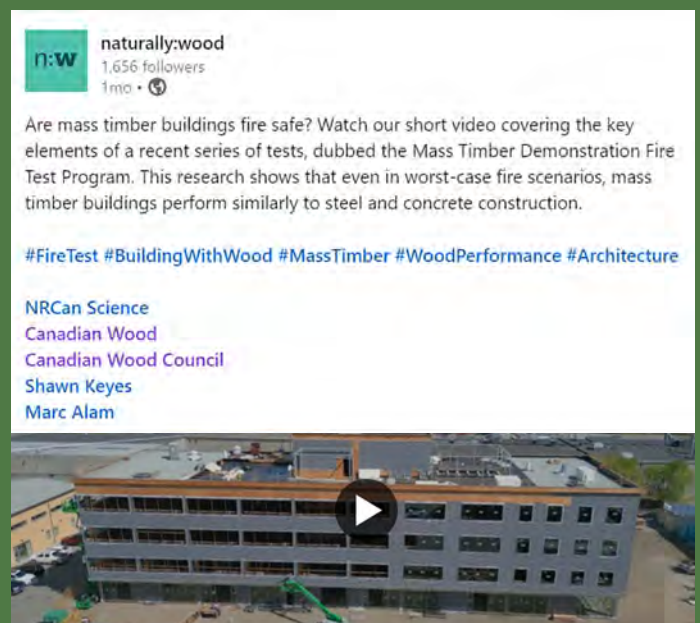
Mid-century or modern? Western red cedar is both

Home makeovers are a popular topic for YouTube videos, as many homeowners look for inspiration and tips when upgrading their older homes to modern standards. Building on this interest, Real Cedar partnered with Canadian House & Home on a mid-century modern makeover featuring western red cedar. The project was showcased in a two-part video series, *Before & After: A Mid-Century Modern, West Coast Home Gets A Stunning Renovation*, on House & Home's popular YouTube channel.

Within the first six months, the first video in the series generated more than 90,000 views.

Building mass timber's reputation

As a newer material for larger buildings, mass timber is still building its reputation. In partnership with the Canadian Wood Council and WoodWorks BC, naturally:wood ran multichannel campaigns sharing the latest research and tools addressing fire safety performance and insurance costs. Content was shared through naturally:wood, and paid media such as SiteNews and Business in Vancouver, receiving almost 23k pageviews.



Healthy, resilient cities



The Shore | Photo: Adera/RAEF.ca

A major trend in urban planning and construction is that of creating healthy, resilient cities. Typically, the solution includes reducing the carbon impact of the built environment and providing more affordable housing options.

With so many examples in B.C. of wood use in a range of residential, commercial and community infrastructure and public spaces, FII is positioning wood products and advanced wood building systems as a means to achieve safe and equitable cities. Education, training and communications materials target key stakeholders, including government officials, architects and engineers, and construction professionals. Content includes timely and high-demand information on energy-saving replicable design, lean project delivery methods, prefabrication, and digital design tools.

Setting a gold standard

As societies develop strategies to reduce carbon emissions, the means of tracking carbon output are becoming more sophisticated. Increasingly, life cycle assessment (LCA) is the predominant standard, as it records the total carbon impact of a building. Wood use in buildings is becoming a popular way to manage for embodied carbon in the built environment, particularly for larger and taller buildings.

FII continued to support efforts to mainstream life cycle assessment and build knowledge in tools and approaches to reduce the environmental impact of buildings. UBC Sustainability Hub was commissioned to document the latest global, Canadian and regional developments in embodied carbon emissions policies and initiatives.

There are numerous approaches that attempt to track and quantify the biogenic carbon flows over the life cycle of long-lived harvested wood products (HWP), but within the LCA community, there is currently no consistent and internationally accepted biogenic carbon accounting approach that includes all carbon stored in, sequestered by, and emitted through organic matter. FII supported an overview of the current state of knowledge on biogenic carbon accounting in the context of LCA studies of HWP and biobased construction systems now being referenced by forest and building sector stakeholders in North America.

Finally, data from recently FII-funded environmental products declarations (EPDs) for B.C. wood products—glulam, cross-laminated timber, plywood and lumber—was harmonised into the next version of the popular software tool, the Athena Impact Estimator for Buildings.



Municipal planning, smart densification

To help foster further adoption by municipalities of mass timber and wood-hybrid construction, Simon Fraser University's Renewable Cities program published *Design Solutions to Prefab Mass Timber Construction v2.0*. It is the latest addition to work led by SFU Renewable Cities which provides guidance on how municipal land use regulations and design guidelines can better accommodate mass timber buildings (up to 18 storeys) in B.C. Developed with FII Wood First funding, this report emphasized success factors for broadening the use of mass timber.



330 Goldstream Ave | Photo: James Jones Photography, courtesy Cascadia Architects

Energy-efficient, affordable housing

Serving as a demonstration for municipalities and housing authorities, Goldstream is a 102-unit affordable housing project developed by the Greater Victoria Housing Society using the Lean Project Delivery (LPD) method. Goldstream showcases how a six-storey wood-frame building can achieve very high energy efficiency, while remaining cost-effective. Working with BC Housing, FII funded the documentation on integration of digital tools, prefabrication strategies and LPD lessons learned to achieve quality performance and reliability. Through naturally:wood and social media, FII amplified the Builder Technical Bulletin Series on LPD methods, prefabrication strategies, and the integration of digital tools.



Photo: Western Red Cedar Lumber Association

BC Cancer Foundation: cedar supports family wellness

Supportive care centres cater to the holistic needs of patients and their families confronting cancer, but the buildings can be stressful, given the difficult circumstances.

To make the centre in Vancouver more welcoming, the BC Cancer Foundation recently added western red cedar, provided by the Western Red Cedar Lumber Association, to the interior of the building.

Research shows that spaces with natural materials like wood can reduce stress, and contribute to a patient's health and wellbeing. Through promoting wellness, finding practical solutions and supporting patients in a welcoming and calming environment, the Supportive Care Centre aims to improve outcomes and quality of life for British Columbians.

Innovation and leadership

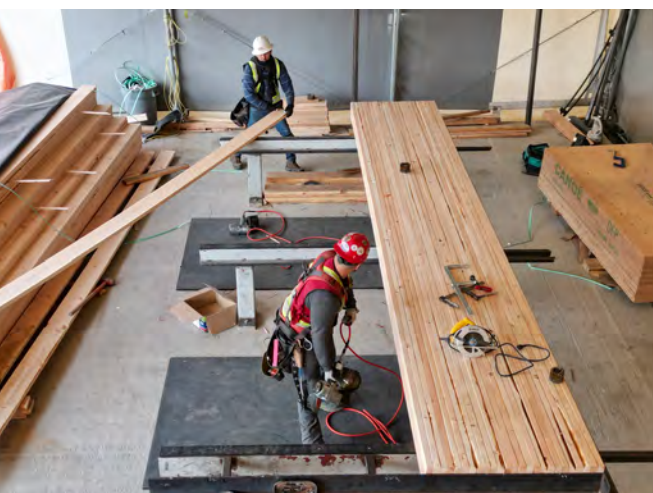


The Exchange | Photo: Jason Harding, courtesy naturallywood.com



Working alongside B.C.'s Office of Mass Timber Implementation, FII is facilitating the expansion of mass timber in B.C. Areas of focus include research and education to reduce technical and perception barriers to product use, and support for building projects demonstrating the variety of possibilities and applications for mass timber in construction. Recent building code changes adopted in B.C. now allow mass timber buildings up to 18 storeys. Following a technical and code analysis report commissioned by FII, the Office of Mass Timber Implementation (OMTI) and the Office of Housing and Construction Standards drove a new code development process, in partnership with Ontario and Quebec, to safely update building codes on an accelerated timeline.

These changes create new market opportunities for mass timber use, as they allow for taller mass timber buildings, more exposed wood and increased heights for a range of other building types, such as schools, shopping centres and industrial facilities. FII will be actively supporting government's implementation of this new code change and acknowledges OMTI's key leadership in driving this change provincially and nationally.



The Exchange | Photos: Jason Harding, courtesy naturallywood.com

Mass timber uprising

Wood buildings are mounting to new heights across B.C. through the Mass Timber Demonstration Program (MTDP) funded by the Ministry of Jobs, Economic Development and Innovation and FII. Designed to showcase the potential of building taller and larger buildings from wood, the 19 projects include six that are 7+ storeys. Projects range from a new multi-use municipal centre targeting Passive House certification in Castlegar to a 25-storey mass timber rental housing tower in Vancouver's Downtown Eastside.

FII and naturally:wood are collaborating with WoodWorks BC to document each project in the areas of taller wood, scalability, rental housing, energy efficiency, and new design and construction practices. Lessons learned are being shared with B.C.'s building industry, including design practitioners, developers, construction contractors, provincial and municipal regulators, and permitting and approval agencies.

To date, documentation and outreach by FII has been extensive on completed research and building activity associated with the Mass Timber Demonstration Program including project tours, case studies, social media, digital promotion and extensive collection of video. Results have been strong, including more than 21,000 pageviews on naturally:wood regarding MTDP-funded fire testing results.



WoodWorks BC—supporting projects to improve outcomes and build capacity

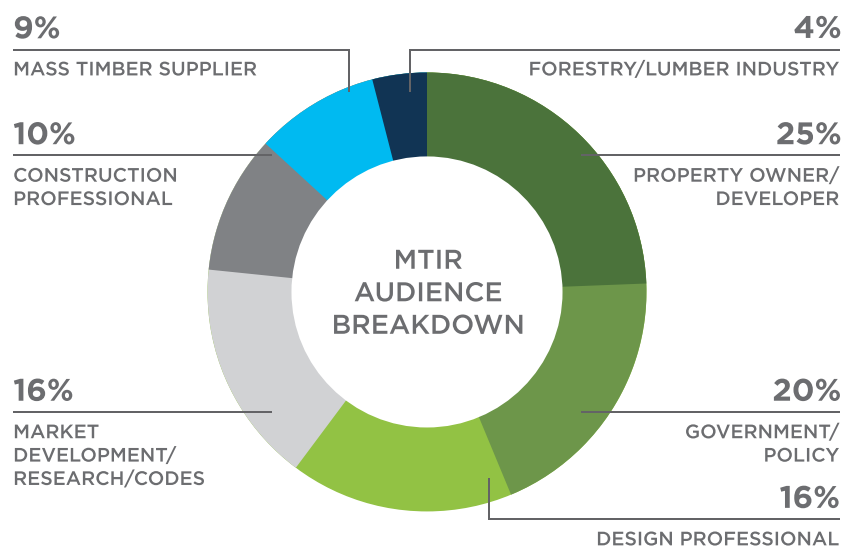
With building codes allowing wood use in taller building applications, there is increasing interest by architects, engineers and developers to build their knowledge and expertise with these new approaches.

Delivered by professionals in structural engineering and real-estate development, WoodWorks BC is providing support services to build capacity for wood design. Their early engagement increases both the use and scope of wood systems in building projects.

In 2023/24, WoodWorks achieved a significant milestone by expanding outreach to new audiences, resulting in 67 percent of engagements representing first-time interactions with WoodWorks. Interactions with developers and building owners ranged from exploration of first-time use of wood and wood-hybrid solutions in mid-rise and taller buildings through to leveraging recently announced zoning and density opportunities.

WoodWorks mass timber industry roundtable

Hosted in Vancouver by the WoodWorks BC program as a part of the Canadian Wood Council, over 100 industry leaders from development, architecture, engineering, construction, mass timber supply and supporting sectors collaborated on strategic discussions to accelerate mass timber adoption in Canadian construction markets. Key findings involving potential focus areas for standards and optimization of building systems, permitting, design and construction, as well as education and upskilling initiatives, can be utilized by industry and government.





Global Buyers Mission

From a small gathering in Penticton 20 years ago, the Global Buyers Mission (GBM) has grown into a major international event to promote Canadian wood and B.C.'s value-added sector.

Premier David Eby recognized these accomplishments when he made history as the first Premier of B.C. to officially inaugurate a GBM. A Mass & Heavy Timber Symposium, with keynote speaker and Canadian mass timber pioneer Michael Green, was a must-attend event for the 700 delegates to the conference. The symposium, officially opened by B.C.'s Minister of State for Trade, the Honourable Jagrup Brar, highlighted the province's mass timber economy and leadership in advanced wood building systems.

Photos: BC Wood

Decision support

FII funds a range of research activities each year to advance innovation and growth in B.C.'s value-added manufacturing and next generation building systems. FII-supported research across 2023/24 focused on barriers to wood use in larger and taller structures, and developing tools that can be used by key decision makers and influencers in the building and design community.

Canadian Wood Construction Research Network Update

14

**institutions
conducting research**

37

**ongoing research
projects**

4

major areas of research

including: Structural and Serviceability Performance, Fire Safety, Building Envelope and Energy Performance, Sustainable Construction Technologies and Practices

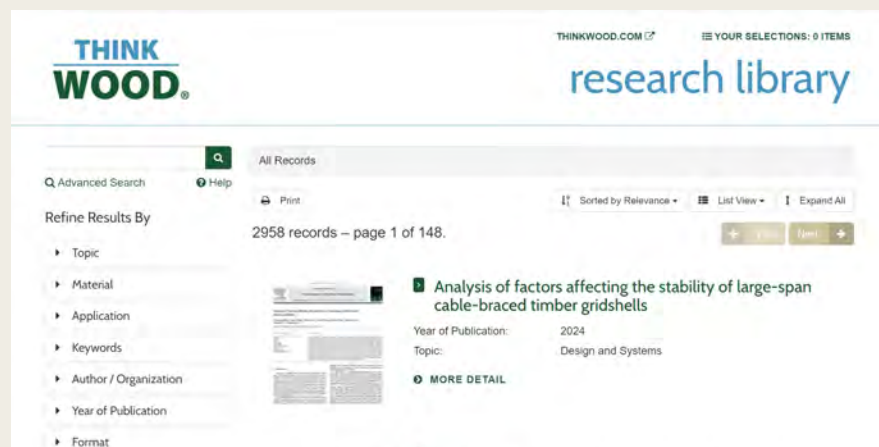
Library and virtual network leverage research capacity

To accelerate knowledge transfer and self-learning on mass timber construction and mid-rise light-frame wood building systems (five storeys and up), FII manages the ThinkWood Research Library and supports the Canadian Wood Construction Research Network (CWCNR).

The library provides a searchable database of more than 2,750 reports for architecture, engineering and construction professionals. The library generated more than 5,500 unique site visits over the past year.

The CWCNR is an interdisciplinary program—funded by FII, industry and other government agencies—that is dedicated to academic research on wood construction in Canada. The network links industry with academics and research agencies like FPInnovations. 31 faculty members from 14 Canadian universities, alongside 20 scientists and professionals representing 12 government and industry partners, are working together with over 50 highly qualified personnel trainees who are contributing to research priorities to inform gaps in design methodologies, performance data, environmental impact assessments and design best practices.

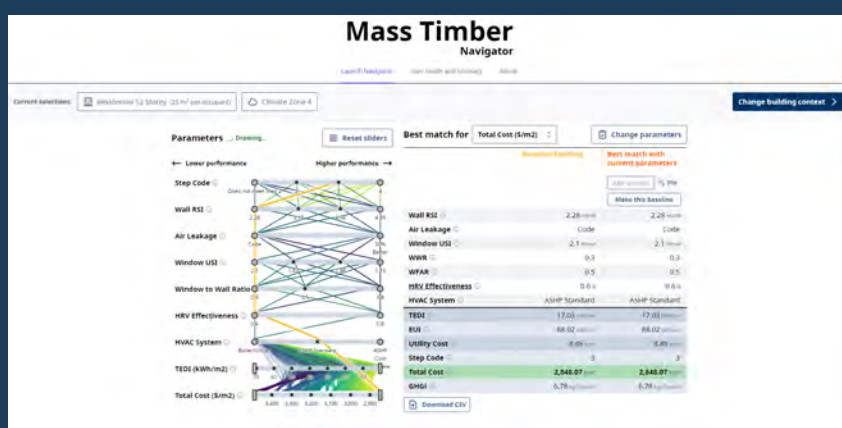
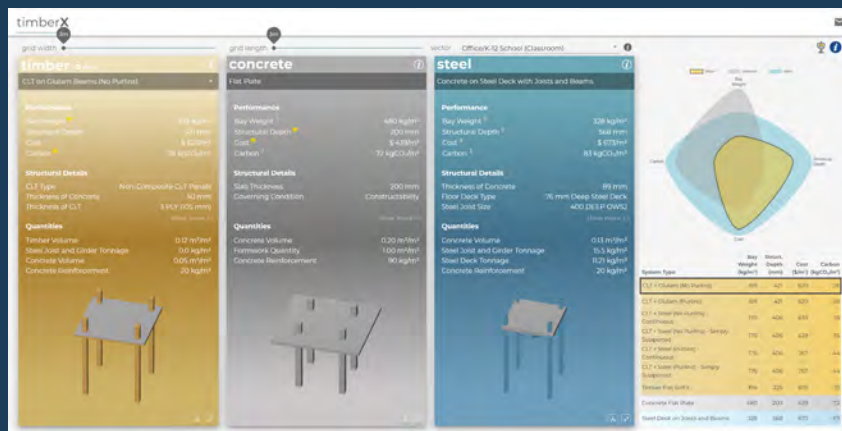
FII also funded early-stage research for a UBC – BC Ministry of Forests – Yinka Dene Economic Development (the business branch of Wet'suwet'en First Nation) project into new types of high-performance thermal building insulation made from forest by-products. Two products—micro-fibrillated wood fiber based foamboard and clay-based, flame-retardant woody foam—have shown promising results.



Tools for builders

FII continues to collaborate with partners and fund the development of tools that architects, engineers and developers can use to guide mass timber and hybrid construction projects. Recent additions include:

- **TimberX**, a concept design tool created for developers, architects and engineers in the early stages of a building project, that provides high-level insight and comparative outcomes of mass timber, concrete, and structural steel systems—addressing structural analysis, cost estimates and carbon performance projections.
- **Mass Timber Navigator**, a comprehensive tool that provides an overview of energy performance, utility and construction costs, and level of code compliance based on the BC Energy Step Code, allowing comparisons between mass timber and other building approaches.
- Developed in tandem with the Navigator tool, a **report on the feasibility of using encapsulated mass timber construction** in 7-12 storey buildings to address the demand for affordable housing while also reducing greenhouse gas emissions.
- **A study into the use of cross-laminated timber (CLT) and cold-formed steel hybrid systems**, a new cost-effective and structurally efficient approach that helps meet the demand for taller mass timber buildings used to inform Mass Timber Demonstration Program building projects.



Supply chain strengthening



Program participants proudly pose with CLT and glulam pavilion designed, fabricated, and built throughout the three-day workshop | Photo: UBC Centre for Advanced Wood Processing

Through the Wood First program, FII helps expand B.C.'s capacity to make value-added wood products and building systems. This added capacity strengthens B.C. as a hub for wood product innovation, ensuring the industry remains at the forefront of sustainable building solutions.

Closing knowledge gaps in mass timber construction

As a relatively new building product in North America, mass timber use still faces knowledge gaps in the design, engineering, manufacturing, and construction sectors. To address this barrier to growth, the University of British Columbia's Centre for Advanced Wood Processing (CAWP) organized a three-day workshop dedicated to mass timber construction through Design for Manufacturing and Assembly (DfMA). DfMA prioritizes ease of manufacturing and assembly by minimizing time, waste, cost and labor, while improving quality and efficiency.

The workshop employed a hands-on lecture/ design/build format, attracting designers, engineers, manufacturers, and contractors. Now in its second year, the sold out workshop drew 16 industry participants and three UBC wood product students who collaborated on the design, fabrication, and assembly of a pavilion using cross-laminated timber and glulam beams.

The workshop's success and the interest it generated indicate a growing acknowledgment of the significance of DfMA in promoting collaboration, reducing costs, and enhancing the efficiency and quality of mass timber construction projects.



Photos: UBC Centre for Advanced Wood Processing



Photos: WoodWorks BC

Education expands CLT potential

While demonstration projects and research highlight the potential of new wood products, like mass timber and CLT, professional uptake tends to occur one firm at a time. Architects and engineers need to build their knowledge and boost their confidence before switching from traditional building systems such as reinforced concrete.

Realizing the benefits of promoting CLT use at the level of individual consulting/engineering firms, WoodWorks BC organized an educational event to inform professionals on the use of CLT panels for point-supported applications. This led to interest from a structural engineering firm. Through follow-up meetings, WoodWorks provided the firm with research and encouragement. Recently, the firm announced its first involvement in a mass timber project in Greater Vancouver.



This incremental approach by WoodWorks extends beyond CLT to other topics of relevance to designers and builders, including embodied carbon, biophilia, and hybrid and advanced wood construction systems.

The background image shows a modern interior space with a ceiling made of horizontal wooden planks. Large windows and glass doors provide a view of a lush green forest. A person is visible sitting on a wooden bench near the glass doors, and a dog is lying on the floor in the foreground. The overall atmosphere is warm and natural.

United States

For decades, American builders and consumers have valued the high quality and reliable supply of B.C. lumber and value-added wood products. Because the U.S. uses more wood than it produces, the American market relies on B.C. to supply about 10 percent of lumber needs—a market share higher than any other foreign supplier, with the exception of Canada as a whole.

As single-family home construction is a well-established commercial market for wood already, FII focuses its efforts on high-potential growth segments. Significant progress has been achieved in enabling greater use of light-frame wood, mass timber and hybrid construction in larger and multi-storey buildings, including multi-family residential, mixed-use/commercial, office, and light industrial/warehousing sectors.

Several market forces are encouraging demand for B.C. wood products and related design services. These include building code changes to allow for taller and larger wood projects, the expansion of B.C. mass timber production to commercial scale, broader developer awareness and demand for advanced wood building systems, and a growing consensus that wood construction is the best approach for carbon mitigation and green building.

Through cost-shared funding, FII is supporting a mix of promotional activities, technical support, education and professional development. Efforts target developer, construction, and design communities. All initiatives focus on expanding wood use in construction as well as niche markets for value-added and outdoor living sectors.

Frits de Vries Halfmoon Bay | Architect: Patrick Warren | Photo: Ema Peter

Housing and construction



Southfield Park 35 Warehouse | Architect: PDMS Group | Engineer: Timberlab | Photo: Mark Humphries Photography

With more than USD \$300 billion¹ of construction activity in a typical year, the U.S. multi-family and commercial construction markets offer tremendous potential for wood consumption, and are a strategic focus of FII programming.

FII is a long-time contributor to programming delivered through WoodWorks U.S., an education and market growth program set up specifically to grow wood use and market share in commercial and multi-family residential sectors.

Broadening the market for lumber and mass timber in taller multi-family housing and commercial construction diversifies market applications for the variety of B.C. products and supporting design expertise. This also helps to protect the B.C. forest sector from the cyclical nature of the American single-family housing market, while increasing opportunities to ship higher-value wood products to the U.S.

¹ [*Commercial and Multifamily Make Solid Gains in 2022 | Dodge Construction Network*](#)



11 E Lenox | Architect: Monte French Design Studio

Much of the WoodWorks program focuses on growing capacity to build with wood through technical project support, design tools and resources, and educational programs. Mass timber and advanced wood systems are emphasized as part of a green building to improve sustainability and reduce the carbon impact of a project.

Mass timber: from niche market to mainstream

The rapid growth of mass timber construction is one of the greatest successes of the WoodWorks program. With more than 2,000 projects underway or completed in the U.S., the use of mass timber is quickly moving from niche to a mainstream construction choice.

WoodWorks has invested heavily in the sector through professional development, technical support and other advisory services. Design and construction professionals received over 76,000 hours of practitioner

support last year, leading to the conversion of 434 projects to mass timber from other materials.

Over the next five years, mass timber construction is projected to double to more than 20 million square feet (in terms of annual project activity).

2,000+
projects

Light-frame construction mainstay in wood projects

While mass timber is making great advances in construction usage, light-frame construction represents 66 percent of multi-family and non-residential projects reported by WoodWorks in 2023/24. To help professionals keep up to date on advances in light-frame construction techniques, WoodWorks connected with thousands of professionals through over 100 events—leveraging many of these sessions with blended presentations on light-frame and mass timber topics.

WoodWorks connected with

49,000+ AT **585**
PROFESSIONALS EVENTS

OVER

76,000
delivered hours of
professional development



Nez Perce-Clearwater National Forests Supervisor's Office | Architect: Mosaic Architecture | Engineer: Morrison-Maierle | Photo: Heidi Long, Longview Studios

Nez Perce-Clearwater National Forests Supervisor's Office will be the subject of a forthcoming Whole Building Lifecycle Analysis study by WoodWorks

Developers and design professionals | Whole Building LCA knowledge mobilization

Whole Building Life Cycle Assessment (WBLCA) is the generally accepted approach for calculating an existing building's carbon impact or comparing design alternatives for new buildings. Results tend to show that building with wood is a proven way to reduce the carbon impact of a project. However, competing systems for calculating WBLCA, a lack of consistent design standards, and the highly technical nature of the calculations, can make it challenging for design professionals and developers to undertake this type of analysis.

To promote the use of WBLCA, WoodWorks has developed a set of educational materials to overcome the hesitancy by design professionals to embrace life cycle assessment in their planning. Many of these materials focus on mass timber construction, as it is an area of particular interest to design professionals interested in carbon mitigation.

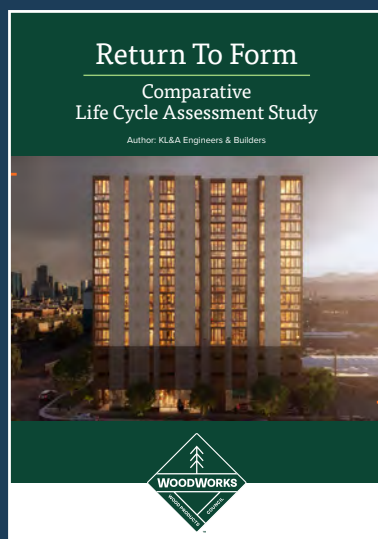
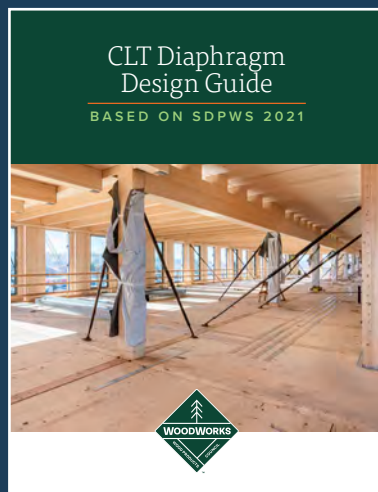
These materials outline international standards, provide guidance on how a life cycle assessment (LCA) for mass timber buildings can be performed using commercially available LCA tools, and include a worksheet.

WoodWorks released a series of building studies that compares the carbon impact of mass timber to equivalent structures built with concrete and steel. The highly detailed studies include methodology, code compliance, building design, LCA, and a standardized cost analysis that are consistent through all of the projects.

Building an informed community

The many benefits of building with wood are especially obvious to project designers and developers when they feel fully informed, particularly with newer approaches, like mass timber.

As a result, much of WoodWorks' activities focus on filling information gaps and giving construction professionals the confidence to build more with wood.



Cutting carbon consumption in the construction sector

Buildings, whether through construction or ongoing operation, account for nearly 40 percent of annual global carbon emissions². This makes building greener an important part of cutting carbon emissions and achieving a carbon neutral world.

To this end, WoodWorks reached more than 1,300 specifiers through two webinars on how to address carbon in the built environment. The seminars outlined the environmental benefits of building with wood and guidance on how to quantify embodied carbon and biogenic carbon storage in wood products.

Technical guides

When mass timber construction was in its infancy, the design team on each project had to deal with every technical challenge. Today, as mass timber grows in popularity, design professionals are looking for guides that share experience and deal with the most common technical issues in order to speed their design process and cut costs without sacrificing quality or safety.

To build this body of knowledge, WoodWorks regularly publishes technical guides, expert tip articles, and case studies. Some are very specific, such as on CLT use in diaphragm design, while others are more general, such as approaches to costing a mass timber project. All of these papers are designed to build capacity and confidence with design professionals regarding mass timber construction.

Fire safety tests and insurance

Determining the true cost of a mass timber project requires an understanding of repair versus replacement costs, such as after a fire. To deal with this issue, WoodWorks published a paper on the repair of fire-damaged mass timber. The paper reviewed four projects and summarized post-fire repair strategies. It is intended to better equip developers and insurers with the skills to accurately assess mass timber projects, including the risks and impacts of fire-damage remediation.

WoodWorks also published the results of a fire safety test related to the use of CLT for exterior building cladding. The test was successful and means that developers can now incorporate CLT into taller building exteriors without having to conduct their own, expensive testing.

² [How much carbon does the construction industry emit? | World Economic Forum \(weforum.org\)](https://www.weforum.org/publications/how-much-carbon-does-the-construction-industry-emit/)

Outdoor living

The outdoor living market makes up 20 percent of U.S. softwood demand, making it a sizeable and lucrative market. It includes professional landscaping and DIY segments. Marketing efforts supported by FII are focused on promoting western red cedar (WRC), as B.C. is home to the largest standing stock of WRC in the world.

³ [*A mystery at the core of Canada's western redcedar*](#)

WRC supports a thriving wood sector that generates more than \$1 billion a year in economic activity³ in B.C., much from exports to the U.S. Because WRC products face substitution competition from plastic, metal, and cement-based products in various applications, ongoing promotion is needed to maintain market share and sales.



Frits de Vries Halfmoon Bay | Architect: Patrick Warren | Photos: Ema Peter



A strategic approach to boosting demand for Real Cedar partnership

Through the Real Cedar brand, the Western Red Cedar Lumber Association (WRCLA) runs a coordinated campaign based on proven marketing principles: building awareness, creating inspiration and interest, fostering education and understanding, and generating sales.

The approach, funded in part by FII, targets both consumers and influencers through promotion, social media and direct engagement. Individual campaigns promote the many benefits of the species while responding to competitive pressures and products.

Socially popular

Real Cedar runs a dynamic digital program that uses social media to drive traffic towards the brand's website, where videos, DIY project plans, find a local retailer search, among other features, offer extensive functionality to users.

Results in 2023 were impressive, with website visits up 8 percent and Find-A-Retailer search increasing 16 percent on a year-over-year basis. Social media apps, like Instagram, drove much of this growth, often generating an increase in hit rates of more than 20 percent. Users downloaded more than 47,000 project plans from the website, showing the strong connection established by the brand with consumers.

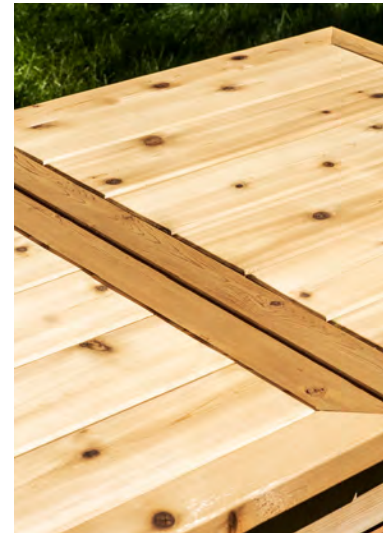
Shorter videos and more testimonials from influencers were credited for these positive trends. And, as awareness of climate change continued to grow and influence buyer decisions, continued positioning of western red cedar as a natural product that plays an important role in carbon sequestration helped to counter marketplace threats from composite products.

39,000

Find-A-Retailer visits

47,000

project downloads



Western red cedar DIY table | Photos: Western Red Cedar Lumber Association

DIY does it with cedar

With annual retail sales approaching USD \$550 billion⁴, the DIY market in America is a large and lucrative opportunity for value-added products, like western red cedar. Leveraging the growing use by DIYers of online videos, the Real Cedar campaign created a DIY Project Plan page at the realcedar.com website. The page offered how-to videos, downloadable plans, and links to nearby western red cedar retailers. Along with guiding the DIYer on how to build a specific project, the videos educated viewers on the many benefits and versatility of cedar products.

The Project Plan page was cross-promoted through social media advertising that reached 15 million users. Results were impressive. Visits to the retailer page topped 50,000 and the most popular design—a bike storage shed—had 155,000 visits and more than 25,000 downloads.

⁴ [Home improvement in the U.S. - Statistics & Facts | Statista](https://www.statista.com/statistics/1088884/home-improvement-in-the-us/)

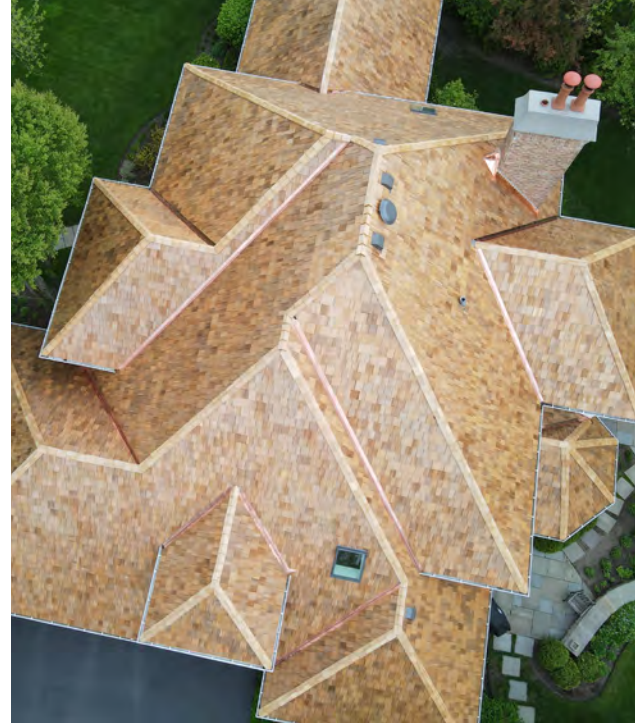


Photo: Cedar Shake and Shingle Bureau

Boosting demand for cedar shakes and shingles

The Cedar Shake and Shingle Bureau (CSSB) continues to strengthen its well-established brand through targeted promotion, while responding to market challenges from competing products. Social media makes up a large part of the marketing portfolio, with posts driving consumers and influencers to the CSSB website. Posts included finalized job site photos, in-progress job site photos, product information, FAQs and trade show information. Engagement on Facebook has increased 1,300 percent since a new program was launched in the fall of 2023.

Education seminars last year helped contractors become more knowledgeable in working with cedar. This responded to some faulty installation practices and gave the CSSB a platform to counter incorrect misinformation on building codes and B.C. forest practices. CSSB also used these opportunities to promote the low carbon impact of cedar when compared to competing products.

Value-added



Liberty Service Dogs | Photo: BC Wood

The U.S. is, by far, the most important export market for the B.C. value-added sector. More than 97 percent of export sales go to America, with recent annual sales the highest in a decade. B.C. exports a wide range of value-added products to the U.S.—engineered wood products, doors, windows, joinery and finishings, and furniture—with sales relatively balanced between these categories. But with these sales only accounting for one percent of U.S. demand, there remains significant opportunities to boost exports to even higher levels.

A major challenge for B.C. firms is that many are relatively small operations with limited capacity and marketing budgets. To help these firms access markets, BC Wood Specialties Group (BC Wood), with funding provided through FII, has developed a market development program that helps new exporters enter the U.S. market while assisting existing exporters in growing their business in America.

Virtual training promotes value-added exports; broadens industry participation

With most firms small- to middle-sized, B.C.'s value-added sector differentiates itself from large, foreign competitors by stressing quality craftsmanship and customer service. This approach creates very loyal customers, but it can limit the ability to reach out to new markets, particularly in the U.S. or overseas.

To help build export markets, BC Wood offers a wide range of training and support services. During the COVID-19 pandemic, these services were delivered virtually as the Export Readiness Training Program (ERTP). Through a series of seminars, the ERTP covered topics including identifying and developing potential export markets, supporting new customers, and addressing shipping and export documentation challenges. The program was a big hit, particularly for firms outside the lower mainland (where face-to-face training is traditionally held). There was particular interest in opportunities exporting to the U.S., the largest and most accessible market for B.C.'s value-added sector.

With markets reopening and COVID-19 restrictions lifted, BC Wood has built on the successes of the ERTP with even stronger support for members by organizing participation in key trade shows, facilitating direct connections between buyers and sellers, and a renewed program of market skills training and development.



"The Export Readiness Training Program has provided us with invaluable insights into the export process that would have otherwise taken us YEARS to learn on our own. We've also connected with some key industry contacts that are going to really help us develop as a business and ensure our success in both domestic and foreign markets. A huge thank you to BC Wood for this opportunity!"

Amanda,
Vevox Corporation

"Good insight into all aspects of establishing new export markets. Was really helpful to get us started in the right direction."

Carl,
Island Timber Frame

66

participants since
program inception
in 2019/20

A lift up and a leg over

Larger projects, like resort developments, are lucrative to the value-added sector, but can be challenging for individual firms to access. The long lead times for many projects—often in years—and difficulties in connecting with buyers can create huge barriers to success.

Realizing this, BC Wood acts as a facilitator to bring developers together with value-added firms in B.C. Through ongoing B2B marketing, including trade shows in the U.S., networking events, and the annual Global Buyers Mission in Whistler, BC Wood helps lower the barriers for firms to connect with potential buyers in America.

Six Senses Napa Valley is an example of this approach. Set on a 3,000 acre estate in northern California, the project involves the updating of the original spa and the addition of 95 rooms and suites, and 16 premium residences. Through connections made by BC Wood, four B.C. companies were retained as suppliers to the project.

Five other B.C. firms benefited from this B2B strategy through the Liberty Dogs project in Nevada. The firms are providing value-added wood products and services to the 27-acre project.

Located in Reno, Nevada, Liberty Dogs will offer training programs to disabled veterans and their service dogs, all at no cost to them.

The campus will include a training facility, dog housing, an administrative and multipurpose building, and accommodations for veterans staying on campus to train with their Liberty Service Dogs. The facility is planned to open in 2026.



Liberty Service Dogs | Photos: BC Wood



Japan

As B.C.'s second-largest market by value for softwood lumber, Japan remains a key and long-standing destination for B.C. wood products. The province has been supplying Japan with softwood for more than 100 years and, in that time, has built a reputation for its high quality, sustainable wood products.

In terms of market potential, demand is anchored by a strong cultural affinity for building with wood, particularly for residential housing, tourism and cultural sectors.

The Canada Wood Group leads the marketing effort in Japan with an emphasis on both maintaining brand awareness and existing market segments, and pursuing emerging opportunities. Non-residential and multi-family residential construction offer the greatest growth opportunities, as single-family home construction is trending downwards due to an aging population. Within these sectors, increasing interest by developers in mass timber and engineered wood products are generating further opportunities to promote Canada's advanced wood technologies and building systems, using wood sourced from B.C.

There are also niche opportunities for B.C. value-added wood products. Led by BC Wood, promotional efforts target the resort, non-residential and renovation sectors.

Japan is also B.C.'s largest foreign market for wood pellets with a market development program led by the Canadian Wood Pellet Association to maintain sales and market share.

Photo: Fuji Realty Co., Ltd.

Walking the talk: trade missions raise B.C. profile in Japan



B.C. 2023 Forest Sector Mission to Japan | Photo: Canada Wood

Japan's strong cultural affinity for building with wood, and its preference for higher grades of wood, make it an attractive market to lumber exporters. In recent years B.C. has faced increased competition from European suppliers. Resurgent domestic supply, combined with government policies that favour local wood species, make the marketplace even more complex.

In this highly competitive environment, market share can quickly be lost if market development efforts are not maintained. Recognizing this, the B.C. government, industry and First Nations partnered on a high-profile mission to Japan to reinforce to Japanese buyers the unwavering commitment of B.C. to maintaining a steady supply of high-quality, sustainably harvested wood products to Japan.



Chief Lynda Price, Board Director with the B.C. Assembly of First Nations and Chief of the Ulkatcho First Nation, exchanged gifts with Port Plus project site host | Photo: Canada Wood

Japan trade mission highlights government-industry-First Nations partnership

Led by B.C. Forests Minister Bruce Ralston, a delegation of more than 40 high-level industry, government and First Nations representatives visited Tokyo in December 2023. The mission featured significant First Nations representation, led by Chief Lynda Price, Board Director with the B.C. Assembly of First Nations and Chief of the Ulkatcho First Nation.

The four-day program led more than 200 Japanese stakeholders through six site visits, three networking events, and one-on-one meetings.

A highlight of the mission was the 3rd Canada-Japan Wood Forum. With more than 180 participants, the forum allowed Japanese stakeholders to engage with B.C. representatives on the state of the B.C. forest sector and for industry personnel to explore opportunities with their Japanese counterparts for advanced wood use in non-residential, mid-rise, and mass timber construction. For the first time, a First Nations-focused panel informed Japanese stakeholders on the shared stewardship model that is emerging in B.C. and the stability it will bring to future B.C. lumber supplies.



Canada-Japan Wood Forum Partner Recognition Plaque Ceremony | Photo: Canada Wood



Photos: BC Wood



First Nations showcasing value-added wood products in Japan

During the mission, government and First Nations delegates visited Mihashi Corporation's Tokyo Showroom to see Huu-ay-aht First Nation-owned, Timber Tiles, on display.

Timber Tiles, a firm based in Port Alberni on Vancouver Island, manufactures a unique wooden tile from western hemlock, among other B.C. species. The tiles can be used to cover walls or replace ceramic tiles for interior decorating. BC Wood, through its market development program, helped connect Timber Tiles with Mihashi, the largest moulding supplier in Japan. Thanks to this support, Timber Tiles has been added to Mihashi's product catalogue and is available across Mihashi's Japan network.

Chief Councillor John Jack with the Huu-ay-aht First Nation and Minister Ralston were welcomed by Mihashi Corporation's Chairman, Hideo Mitsuhashi, during the visit.

With the strengthened partnership, Mihashi and Timber Tiles were one of the products featured in the Canadian Pavilion at the Nikkei Architectural and Construction Materials Show in March 2024. The pavilion is organized by BC Wood with funding support from FII.



Strengthening relationships in Japan's 2x4 sector

To provide a hands-on sense of how B.C. forest products are used in multi-family construction in Japan, mission participants visited a multi-family residential project by developer Seiwa Corporation. After adopting the use of 2x4 construction in consultation with COFI/Canada Wood Japan, the company has built more than 300 platform-frame, three-storey apartment complexes over the past five years.

Mission delegates also visited the Wing 2x4 panel factory to learn how spruce-pine-fir (S-P-F) lumber is being used to service residential and non-residential construction markets. Wing is a leading importer of Canadian S-P-F dimension lumber. During the visit Wing announced a partnership with Chemainus-based Centurion Lumber to help advance affordable housing solutions in B.C.



Photos: Canada Wood

Diversifying demand for B.C. softwood in Japan



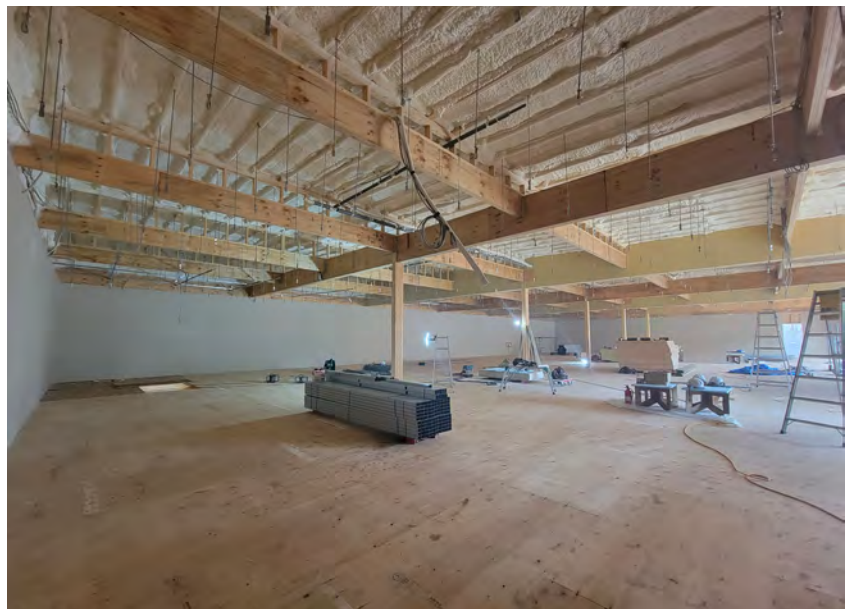
For decades, single-family home construction has been the main market for B.C. softwood lumber in Japan. But with an aging population and fewer homes being built, lumber consumption in the sector is trending downwards. To maintain sales, Canada Wood has been developing new market segments, including mid-rise residential, non-residential and commercial markets. Common to all of these markets is the cost-competitiveness of wood-frame construction when compared to concrete or steel. Developers are also influenced by the lower carbon footprint of wood, as governments introduce new guidelines for green building.

Faster construction, lower cost seals the deal for wood-frame construction

Japanese architects and engineers are opening up new opportunities for wood-frame construction through greater use of engineered wood products. Laminated lumber trusses and beams, for example, allow longer roof spans than through traditional wood-frame construction. The result is that buildings which require large, open floor areas—like warehouses—are now competitive for advanced wood building systems.

The Sanuki Cotton Warehouse is an example of this trend. Covering 1,353 square metres and using 240 cubic metres of wood products, it was built using platform frame construction. The building's walls and roof were assembled using S-P-F dimension lumber.

Kowa Manufacturing chose wood-frame construction for a new warehouse and office complex based on lower costs and a faster construction time. To ensure the design could match the span of a steel structure, the project engineers combined laminated wood trusses with 2x10 S-P-F rafters sheathed with plywood to achieve spans of more than 25 metres. The 2,500-square-metre building used more than 325 cubic metres of lumber and engineered wood products.



Photos: Canada Wood

“This is Me” shows wood construction can deal with safety issues

Two technical issues—seismic performance and fire-resistance—have tended to hold back larger wood building projects in Japan. A new mid-rise commercial building in Japan shows that both issues can be dealt with successfully.

“This is Me” is a five-storey commercial building constructed entirely of wood. To deal with seismic performance, the building uses a high-performance Midply Wood Shear Wall System made from Canadian S-P-F lumber and oriented strand board (OSB). The approach was developed in Vancouver by FPInnovations. Canada Wood worked with Japanese officials to have the engineered building assembly certified under Japan’s Building Standards Law. With this certification, the Canadian Midply Wall System has now been used in more than 10,000 projects across Japan.

To achieve fire safety approvals, the building uses assemblies developed in partnership with the Japan 2x4 Home Builders Association. The approach was extensively tested by authorities before receiving fireproof approvals. Without these fireproof approvals, the project could not have been built.

The 592-square-metre building makes extensive use of Canadian 2x4 and 2x6 S-P-F dimension lumber.

With the resolution of the seismic and fireproofing issues, “This is Me” sends the powerful message “This is possible” to Japanese developers regarding wood use for mid-rise projects.



Photos: Fuji Realty Co., Ltd.

Sustaining the Japanese market through research and capacity building

The long-term success of the B.C. forestry industry in Japan is based on a combination of two marketing techniques: meeting today's market needs through highly responsive products and services, and developing tomorrow's markets through research and collaboration with Japanese stakeholders. Much of Canada Wood's efforts in Japan focus on future market development as current issues tend to be dealt with through industry-client relations.

Emerging trends that Canada Wood is focusing on include wood use in mid-rise and non-residential sectors, prefabrication, and wood use to achieve energy efficiency and green building targets.



Photo: Canada Wood



Photos: Canada Wood

Standardizing building prefabrication

The prefabrication of building components has tremendous appeal to builders, as it can cut costs, reduce waste, speed on-site assembly, and make more efficient use of trades personnel. However, achieving these benefits requires procedures and guidelines on manufacturing, transportation, and installation.

To document these standards, Canada Wood and COFI worked with the Japan 2x4 Building Association and a local developer on two apartment building projects for university students at Tohoku University of Agriculture & Forestry using prefabricated components. The procedures documented from the projects are now being reviewed with the intent to establish and circulate standardized practices throughout the construction sector.



Photo: Canada Wood

Research helps 2x4 remain competitive

A recent market research report by Canada Wood indicates a shift in the construction sector, with post and beam construction gaining ground on prefabricated construction, particularly 2x4 systems. This trend can be partially attributed to the lumber price fluctuations witnessed in 2021-2022. The surge in North American lumber prices disproportionately impacted 2x4 construction, as the dimensional lumber (S-P-F) used in these systems saw

a steeper price increase compared to domestic and European wood sources commonly utilized in post and beam structures. Additionally, post and beam designs may inherently require less lumber volume compared to 2x4 framed buildings, further contributing to cost advantages during periods of high lumber prices.

In response, Canada Wood partnered with the Japan 2x4 Home Builders Association to improve the quality and performance of prefabricated, standardized 2x4 floor, roof and wall assemblies. A review has conducted extensive testing to determine the optimal specifications for prefabrication and on-site assembly within strength and safety guidelines. In the next step, prefabricated components based on these specifications will go through on-site review. Tests will validate the most efficient assembly approaches. These results will then be documented in an updated manual that will serve as a unified standard for the Japanese 2x4 construction sector. Canada Wood plans to promote and distribute the manual to panel manufacturers, construction companies, structural engineers and builders to ensure the guidelines become standard practice in the sector.



South Korea

South Korea is a valued market for B.C. wood products, as it helps diversify export risk for the forest sector. While not as large a market for B.C. as neighbouring China and Japan, it continues to offer export opportunities for solid wood and value-added products. Since entering the market in 2006, market development efforts have been successful in creating a Canadian wood brand, positioning wood-frame construction as energy efficient through the Super E® program, connecting B.C. forestry companies with Korean buyers, and diversifying international sales of B.C. wood products.

Rising affluence and government policy supporting green building are two factors that will create future opportunities for wood construction. A greater use of prefabrication, the introduction of mass timber construction, and more construction of mid-rise buildings will create additional favourable conditions in the marketplace. Rounding out the market, niche opportunities continue for B.C. value-added products.

Supported by FII, the Canada Wood Group and BC Wood deliver market development programming in South Korea. Efforts focus on removing barriers to wood use, identifying and supporting market opportunities, and developing and maintaining brand awareness and industry relationships.

Photo: Smart House, Haruhome

Building green with B.C. wood

South Korea has a long-term plan to cut greenhouse gas emissions and achieve carbon neutrality. Greener building construction is an important part of this strategy, with an end goal of all new construction achieving a “net zero” carbon footprint. The Canadian Super E® program, introduced by Canada Wood and local partners in the early days of the policy shift, matches well to these efforts.



Dotori— the little acorn that grew

The old saying that “mighty oak trees from tiny acorns grow” is definitely true in the case of the Dotori (acorn) kindergarten. Built as the first-ever Canadian Super E® public building in South Korea, the facility has achieved a number of milestones. First, it shows the market that a high degree of energy efficiency through wood-frame construction is possible; second, that local firms have the expertise to build to the high standards required by energy efficient systems like Super E®; and third, that the pre-fabrication used for much of the structure is an efficient construction approach in South Korea. Framing the building from pre-fabricated components took only five days—an incredibly fast timeline that has caught the attention of developers and builders. The little acorn planted with Dotori may soon flourish into much broader use of Super E®.



Photos: Professor Tae Woong KANG at Dankook University

Originally developed by Natural Resources Canada, Super E® housing is a high-performance building methodology focusing on how a building must perform, rather than how it is built. This building system responds to Korea’s need for healthy, energy-efficient construction and is now delivered through the Korea Wood Construction Association with support by Canada Wood.



Photo: Canada Wood Korea

Growing capacity to build green

Meeting the growing demand in South Korea for green building requires new skills for architects, engineers, and builders. Towards this end, Canada Wood has been delivering training seminars on green building since 2021. Last year, more than 100 professionals attended courses on designing and building low-energy wood-frame homes. The courses were delivered in partnership with RDH, a local building technology company. The courses were so well received that Canada Wood and RDH are now developing a follow-up module on net zero design and construction.

Industrialized construction

Historically, the vast majority of wood-frame buildings in South Korea have been constructed on-site. For several reasons, including labour shortage, quality control, a desire to cut waste, and a need to reduce transportation costs, many developers are now looking to industrialized construction as a solution. This includes modular homes where the building is completed in a factory and then shipped, in whole, to its final location. Pre-fabrication of building components, such as wall panels, is another approach that is growing in popularity.

Also driving demand for more industrialized construction is that it is seen as a way to reduce waste and the carbon footprint of a building, and that it reduces the number of carpenters and other trades needed on-site to complete construction. With an aging workforce, many developers are facing a shortage of skilled trades. Industrialized construction is seen as one way of dealing with this shortfall.



Photo: Younglim



Photo: Younglim

TORY, not tiny— a new approach to modular homes

Modular homes in South Korea have historically been targeted to the premium end of the marketplace, making the homes a niche market. Namuro Homes sees a much larger mainstream opportunity and is appealing to it with a new home—TORY (meaning small, yet robust)—that offers greater value without sacrificing looks or features.

Developed with input from Canada Wood, the TORY home cuts costs by using a 2x6 framework rather than the heavy timber typically used for modular homes. Cladding is premium B.C. cedar, with high-quality doors, windows and interior finishing rounding out the homes. The result is a product that cuts costs, but not quality.

Supporting growth through training



Photo: Canada Wood

To help Space Factory—a company specializing in manufacturing wooden modular homes—ramp up its annual production, Canada Wood held a workshop for the company’s employees on wood design and construction. Canada Wood’s technical support and training have been instrumental in Space Factory’s development and production of wooden modular homes.

The workshop served to dispel misconceptions and prejudices surrounding wood as a building material.

Space Factory now builds about 400 modular homes a year, with plans to triple production to more than 1,200 when a new factory opens later this year.

Promoting prefabrication in the construction sector



Photo: Canada Wood

Prefabricated construction in South Korea has been steadily gaining momentum, fueled by the need for efficient building methods that reduce costs, minimize waste, and promote sustainability. Canada Wood has supported this trend by actively advocating for the adoption of prefabricated wood construction in South Korea.

Part of this advocacy is promotion and stakeholder outreach through trade shows, such as at the 2023 Busan Housing Interior Exhibition. The four-day event allowed Canada Wood to distribute technical and promotional literature and display examples of the Midply Wood Shear Wall System and various wood samples.

Canada Wood also hosted a technical workshop targeting architects, construction companies, and future building owners. The workshop featured experts with experience in designing and constructing wooden prefabricated structures. They shared case studies of successful wooden prefab construction, highlighting the potential of wood as a versatile, sustainable, and cost-effective building material for mid- to high-rise structures.

Adding value to marketing efforts



Hammer Sound | Photo: Park YoungChae

Led by BC Wood, efforts to boost sales of B.C. value-added wood products in South Korea are succeeding through targeting niche markets within larger market segments (such as secondary homes within the larger home construction sector). This approach maximizes the value of the marketing effort by reaching out to targeted individual buyers and developers.

Niche sectors now being developed in South Korea include:

- 2x4 house packages,
- coastal species and glulam for traditional Korean “Hanok” housing,
- log and timber frame construction,
- engineered wood products,
- and finishing materials and cabinetry for high-end wood-frame construction and resort developments.

The resort sector is seen as a growth area for all of these products.

Niche marketing pays off with large housing development

Several years of relationship building with Dujon Housing, a major developer, has paid off with the largest development of wood-frame housing in the history of South Korea. A niche marketing approach was used that included regular contact with Dujon personnel and relationship building through the Global Buyers Mission in British Columbia.

The housing development includes 109 wood-frame homes within a larger community. All of the homes are targeted to the higher end of the housing market, with premium millwork, finishings and construction. The homes are being built with Canadian solid wood and value-added products, including engineered and manufactured wood components.



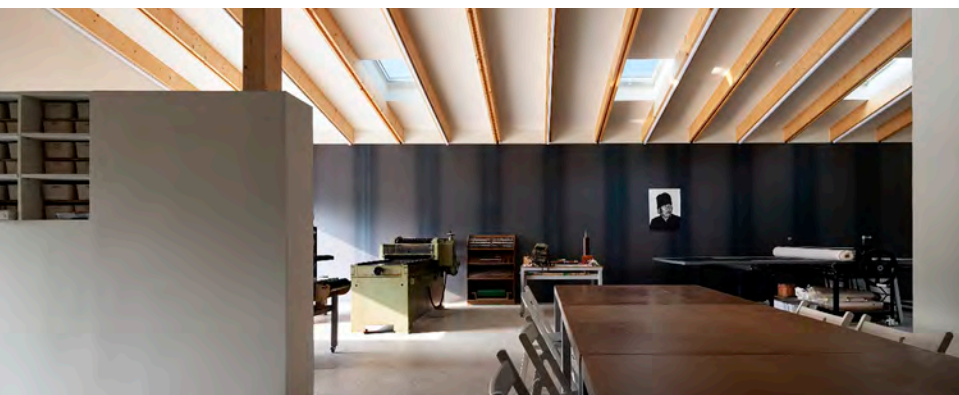
Gyeongsangbuk-do Provincial Government B, C Type Appearance | Photo: BC Wood

BC Wood's approach to marketing programs for value-added wood products involves researching niche opportunities and developing relationships with relevant in-market buyers. The buyers and other key decision makers are invited to the annual Global Buyers Mission (GBM) in Whistler, B.C. The GBM operates as a giant trade fair where dozens of B.C. firms market their products and services to the foreign guests. With the support of BC Wood, promising connections are followed up in-market, finalizing individual projects that showcase the use of B.C. wood species.

A successful example through niche marketing is in the secondary (vacation) home sector, where Azit, a local manufacturer of pre-fabricated modular homes, built a 19-home vacation community. All of the buildings used Canadian structural lumber and panelling, including kiln dried and other premium products.



Photos: Smart House, Haruhome



Hammer Sound | Photos: Park YoungChae

A first for zero energy

B.C.'s value-added wood sector was instrumental in helping the South Korea home construction sector reach an important milestone—the first officially approved zero energy home using wood construction. Developed by Hammer Sound, the project included Canadian input on design and engineering, and the extensive use of B.C. engineered wood, lumber and other building supplies.

With government policy requiring a shift to net zero construction of all new buildings, the Hammer Sound project opens up a large, new market for B.C. lumber and value-added wood products in South Korea.



China

Since first entering the China market more than 20 years ago, B.C. has experienced both export highs during China's construction boom and lows resulting from the global pandemic and its impacts on trade.

China remains B.C.'s second largest market for softwood lumber by volume, and third largest in value, after the United States and Japan. Twenty years of market development delivered by FII (as FII China) and Canada Wood has created a market for wood construction and imported softwood lumber with substantial improvements to the regulatory framework. With wood construction now taking hold commercially, market development efforts are shifting to a more targeted approach focused on leveraging China's carbon reduction and green building priorities and taking advantage of emerging segments to grow wood consumption. These include prefabrication of building components (industrialization of the construction process) and further growth in the use of mass timber and engineered wood products.

Market development in China continues as a partnership between FII and Canada Wood. The program focuses on relationship building with government and industry stakeholders to expand opportunities for higher-value B.C. wood products. Efforts include monitoring trends and policies, addressing barriers, advancing building codes and regulatory standards, and building capacity through technical assistance for individual projects and tailored training programs.

Mass timber office building near Shanghai | Photo: Canada Wood

Government relations— advancing mutual low-carbon priorities



Guangzhou Forum | Photo: FII China

FII China recognizes the importance of maintaining relationships with government stakeholders to influence wood's role in policies and priorities related to energy efficiency, prefabrication and green construction. While maintaining national-level involvement in areas such as building codes and environmental policy, there is also an emphasis on engagement with local jurisdictions that must develop and implement the strategies to show measurable progress towards national targets.

With China's urbanization policy now focused on the sustainable development of smaller and mid-sized cities,

a growing demand for mid-rise buildings and low-carbon solutions is creating new opportunities for wood construction. Showing high-potential municipalities and targeted provincial-level agencies and organizations how to meet low-carbon construction policy objectives through wood use is a key focus of FII China. This approach requires leveraging the credibility which FII has built over the years through a range of initiatives, and an ability to demonstrate relevance to local policy targets, but pays off through expanded wood use and recognition of B.C.'s sustainable wood products.

Partnerships promote wood construction in green building

China has set the ambitious goals of hitting peak carbon output in 2030 and achieving a carbon neutral economy by 2060. Recognizing the carbon impacts of the built environment, China is now looking to green building techniques to help achieve its carbon reduction goals.

Wood, as a form of biogenic carbon and a renewable building material, is an obvious fit for China's green building strategy. FII China has been making this point through an ongoing campaign targeting government officials and other key Chinese stakeholders.

Green and low-carbon forums

FII China has been partnering with provincial authorities to deliver regional seminars focused on the benefits of wood construction for carbon mitigation and green, low-carbon property development. Three forums were held in 2023—in Hebei, Chongqing and Guangzhou—building on a campaign that dates back several years. The forums allow FII China to engage with provincial and municipal stakeholders to advocate for the use of wood products in their local green building projects.



Hebei Forum | Photo: FII China



Chongqing Forum | Photo: FII China



Guangzhou Forum | Photo: FII China

Chinese delegation briefed on B.C.'s leadership in wood technology, green building

In fall 2023, FII welcomed an official delegation from Jiangsu Province to Vancouver—marking the first visit by senior Chinese officials to B.C. since the pandemic. Jiangsu is the fifth most populated province in China, one of its most affluent, and is recognized as a leading province in research and innovation. Led by a senior official in the Department of Housing and Urban-Rural Development of Jiangsu province, the delegation included provincial representatives, state-owned enterprises and industry associations.

To mark the occasion, FII hosted the third Jiangsu-Canada Green and Low-carbon Development Conference in Vancouver, to discuss low-carbon building priorities between jurisdictions and showcase B.C.'s leadership in advanced wood use. Delegates also attended bilateral meetings, wood project visits, and the Global Buyers Mission (GBM) in Whistler hosted by BC Wood. Concurrently, FII China collaborated with the China Wood Protection Industry Association to invite industry representatives to the conference and the GBM.

The visit allowed FII and delegates to advance cooperation in wood construction technology related to green building. At the GBM, delegates engaged with the B.C. forest sector to learn more about B.C.'s sustainable forest practices.



Guangzhou Forum | Photo: FII China

World Cities Day marked with forum on best practices

FII China took the opportunity of World Cities Day, on October 29 in Shanghai, to engage with urban planning officials on the benefits of wood construction in urban renewal projects and building more people-centric cities. The engagement occurred through a forum hosted in partnership with China's Ministry of Housing and Urban-Rural Development (MOHURD). The presentations highlighted B.C. wood projects across Olympic and sporting venues, schools, community centres and residential buildings. FII China discussed how wood construction technology, with its low-carbon profile, strong seismic performance, and thermal benefits, can contribute to the development of resilient cities.



World Cities Day | Photo: FII China

Influencing architecture, engineering students



Facilitated by Canada Wood, 21 students and professors travelled to the University of British Columbia (UBC) from Harbin and Nanjing in the summer of 2023 for the Timber Design Studio—a mix of classroom activity and field trips. A highlight for delegates was the opportunity to see large-scale timber design projects, such as Brock Commons and the Richmond Oval. They also learned how computer aided design could be used to speed construction and reduce waste. Students then applied their teachings by preparing designs for the Chinese National Timber Design Competition (see next story).



Photos: Canada Wood

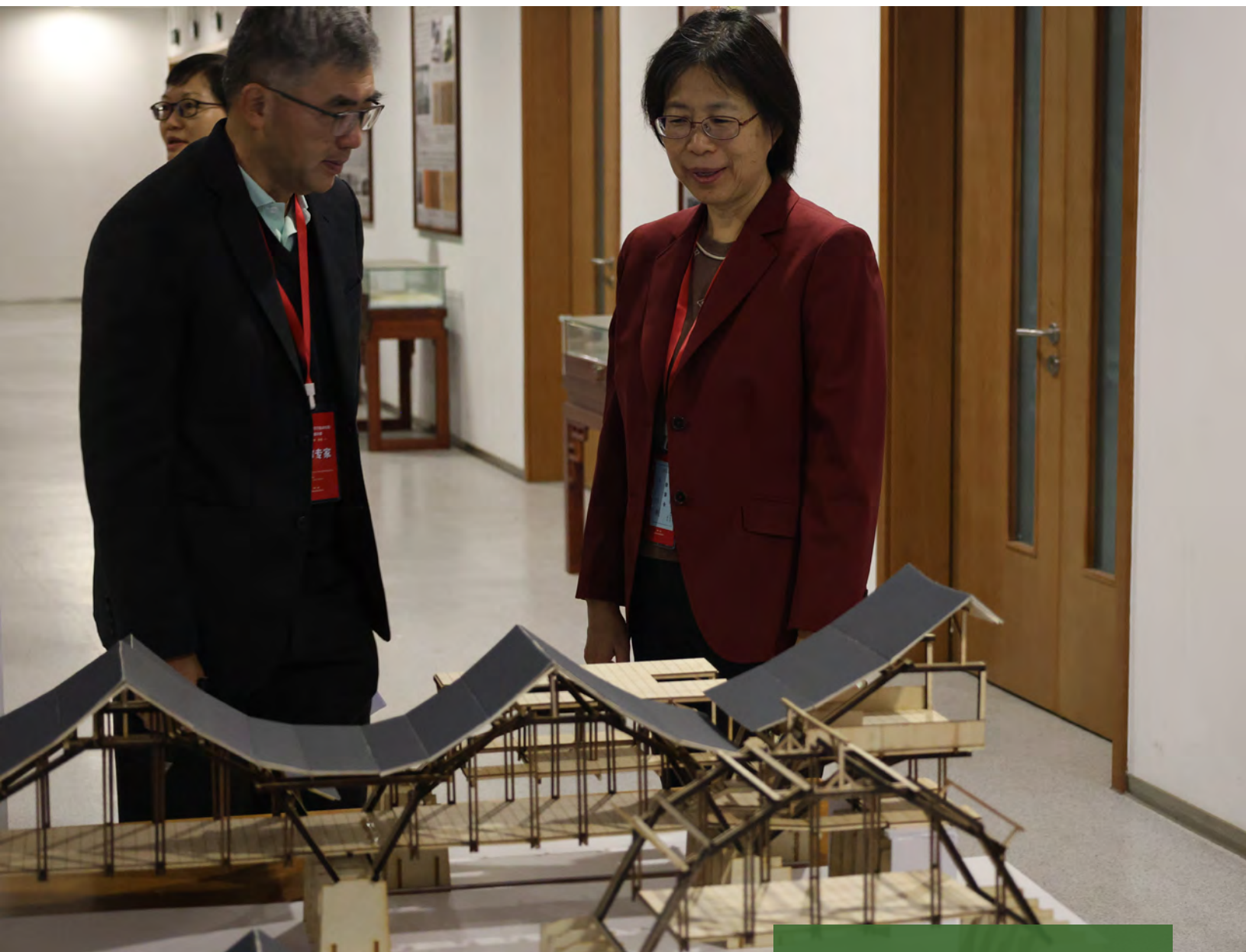


Photo: Canada Wood

More than 200 students organized into 21 design teams submitted designs to the 8th National Timber Design Competition at Nanjing Forestry University in December 2023. In partnership with Canada Wood, the competition is held to encourage university students majoring in architecture and structural engineering to choose wood structures for their design project, strengthen their understanding of the characteristics of timber structure buildings and improve their creativity in design.

Professor Frank Lam of UBC was an adjudicating panel member in judging the ranking of the eight finalist teams.

The theme for the 2023 designs was a historic wood corridor bridge.

National competition bridges gap in timber construction

Overcoming barriers to wood use

Although lacking the profile of demonstration projects or events, efforts to overcome barriers are still an important component of the market development program in China. This includes assisting Chinese authorities in updating building codes and standards for wood construction, a process that has been underway since the start of market development activities in China.



Canadian lumber test | Photo: Canada Wood

Clearing the path for wood products

Initially, work on codes and standards focused on residential wood-frame construction in urban areas. As codes were updated, efforts shifted to office, commercial and mixed-use buildings. Currently, reflecting the Chinese policy priority to find “greener” approaches to construction, the focus is on ensuring wood products, including mass timber materials, can be used in larger and taller buildings.

Recent activities include:

- Working with Chinese authorities to ensure Canadian cross-laminated timber (CLT) can be used in China’s mass timber projects. A series of meetings with Chinese officials and a presentation on North American CLT standards were part of this outreach.
- Preparing a report that outlines a solution to address a regulatory issue concerning inconsistent design values for wood-frame shear wall systems in two different national building standards.
- Providing technical information to authorities that supports Canadian advanced wood building systems and products as input to the updating of national standard design drawings of timber structures. The drawings are supplements to national timber design codes.



Photo: Canada Wood

Glulam certification

Canada Wood China is involved on a continuing basis in the certification of glue-laminated timber (glulam) manufacturers and their products. Use of glulam has grown quickly in response to a number of high-profile demonstration projects, including several with the involvement of the market development program.

In response to this growing demand, more than 100 manufacturers now produce glulam, but most are smaller firms, often with limited resources and expertise. The result can be inconsistent quality of glulam products

that do not meet expected engineering requirements. Authorities responded by developing manufacturing standards.

The China Academy of Building Research has used these standards, with Canada Wood China's involvement, to create a quality certification program. Douglas-fir glulam products manufactured by four firms have received China Academy of Building Research (CABR) certification.

By ensuring the quality and safety of prefabricated timber structures, product certification enhances the credibility of engineered wood products and helps grow the market for glulam.



Photo: Canada Wood

Depending on the issue, efforts to overcome a barrier can take several years; Chinese concerns with the pinewood nematode (PWN) are a case in point. PWN is highly destructive of coniferous forests and Chinese officials were worried that imported logs or lumber could carry PWN throughout the Chinese countryside. Based on these concerns, tight restrictions on lumber imports from Canada, and six other countries, were introduced in 2022. Ongoing engagement with officials has helped to streamline the entry of B.C. softwood into China, with work continuing to unplug other bottlenecks.

Through continual monitoring and response to trade and other barriers, these efforts help ensure B.C. wood products have access to the Chinese market.

Addressing pinewood nematode concerns

Projects as a showcase for wood design potential

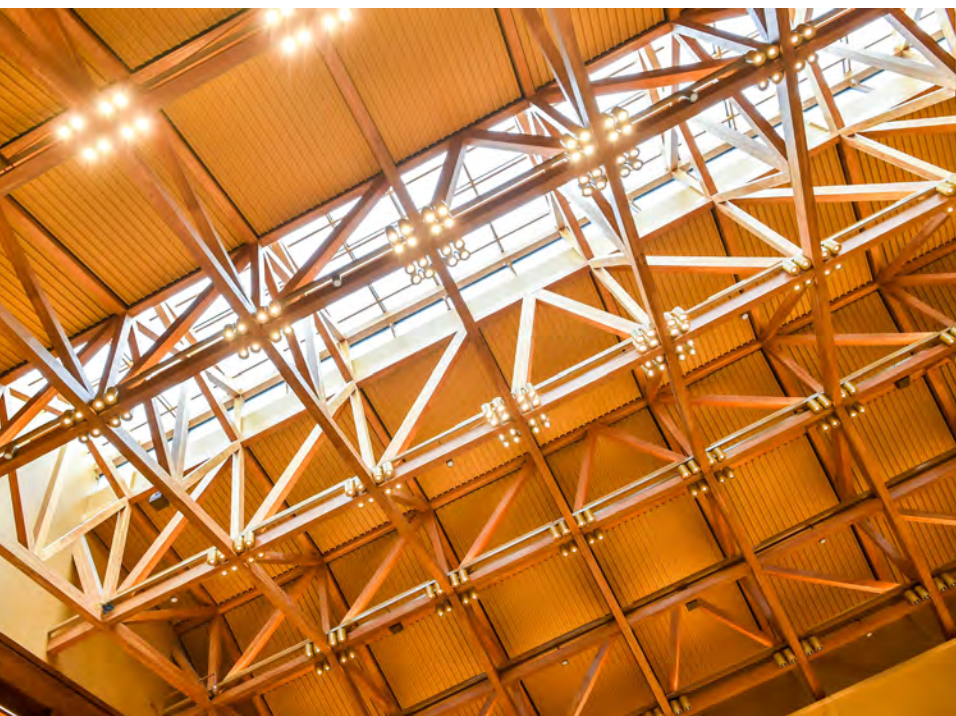


Guangyang Island International Convention Center | Photo: Canada Wood

Demonstration projects are used to showcase the possibilities for wood construction in China. Through advanced design and engineering techniques, signature projects can show, in the most realistic possible way, that wood is equal, if not superior to other building systems.

Initially, these projects were sponsored by Canada Wood's technical program. As Chinese developers and governments gained confidence and expertise in building with wood, they began incorporating advanced wood techniques and mass timber into their own commercially led signature projects, such as showcase homes in housing developments and conference centres.

While no longer needing to initiate or lead demonstration work in China, Canada Wood now provides technical assistance for many commercially developed projects. This support helps with complex engineering and regulatory hurdles, and promotes the many advantages of B.C. wood products and wood construction techniques. This growing confidence in using wood is one of the most significant accomplishments of the market development program in China—evidenced by high-level code changes such as an update in 2017 to allow for 5-storey wood buildings.



Guangyang Island International Convention Center | Photos: Canada Wood

Guangyang Island International Convention Center

More than 4,500 cubic metres of Canadian Douglas-fir was used to construct this international conference center, featuring a no-main-light design and a super-span timber structure. The project used low-impact construction to avoid environmental damage to the local countryside.



Photos: Canada Wood

Concept home promotes wood-frame construction for rural homes

The need to increase urban density is a reason often used by Chinese developers to choose concrete over wood-frame construction for residential housing projects. In rural areas, where density is less of an issue, other factors work to wood's advantage, including aesthetic appeal, cost, construction speed and a lower environmental footprint.

To demonstrate the potential of wood-frame construction in China's rural housing market, Shanghai Green Architects Ltd designed a 94-square-metre demonstration house, using lumber donated from Canfor. Rural housing is a potentially large market, as the Chinese government has introduced programs to replace and modernize aging, and often unsafe, rural homes. The scope of the policy is enormous, as it covers housing on more than 11 million hectares of land.

The developer is now promoting the home to buyers and local officials, as well as conducting further reviews on the cost and viability of the design. Canada Wood continues to collaborate with the firm on the project.



Mass timber office building near Shanghai | Photos: Canada Wood

Office building showcases mass timber appeal

An office building now under construction is showcasing the growing appeal of mass timber-concrete hybrid structures in China. The 4-storey building is built from a mass timber framework on a concrete core. B.C. Douglas-fir glue-laminated timber (glulam) posts and beams make up the structure of the building, along with spruce-pine-fir roof and floor systems manufactured from Canadian lumber. The use of glulam and other wood finishings combines an economical building design with a highly attractive interior and façade.

The 2,175-square-metre building, in Zhejiang, is being used by Lishui Yuanli Green Tech, a glulam manufacturer in Zhejiang, to showcase its projects and design expertise. Canada Wood was a key partner throughout the concept development, design, engineering and on-site construction of the building.





India

As the fastest-growing major economy in the world, with a strong demand for wood products, India is an attractive, long-term market for B.C.

This opportunity is made even greater by in-market factors, including a growing middle class with a high demand for new housing and furnishings, a falling supply of hardwoods for the Indian value-added sector, and a supply chain that is placing even more emphasis on wood from certified, sustainable sources.

With an established presence built through the market development program over the last several years, the Canadian Wood brand is recognized in the market as high-quality, certified and sustainable. The wood in manufacturing sector provides significant opportunities for B.C. and may grow exponentially over the next few years as the sector broadens its scope from domestic to international markets.

With market entry and awareness achieved, the FII India market development program is now in a growth phase to raise the profile and use of B.C. wood products even further. This includes commercial demonstration projects to promote B.C. wood to a larger audience of value-added firms and professionals, product trials to validate the use of B.C. wood in manufacturing, and growing the number of importers and distributors stocking B.C. wood products.

Photo: FII India

Wood in manufacturing



Photo: FII India

In the initial phase of the India market development program, FII conducted extensive research to identify the markets of greatest opportunity for B.C. wood products and the marketing techniques that would be most effective in the country. This research identified the wood in manufacturing sector (WIM) as having the greatest potential. Leveraging the Canada Wood brand already established through marketing efforts in other parts of Asia was seen as the fastest way to build local awareness.

WIM is a large sector that encompasses the making of furniture, doors and door frames, windows and interior finishing products. It includes a large domestic market and a strong export sector. Combined, the sector is growing more than 10 percent per year.

Market development efforts combine product trials, commercial demonstration projects, and ongoing promotion, outreach and education.

Product trials

Through the “Try Canadian Wood” program, manufacturers use small quantity samples of B.C. wood to make furniture, finishings and other products in a commercial setting. This hands-on experience helps to eradicate misperceptions about Canadian species and their applications, while building technical skills at working with softwoods.

Feedback shows that product trials are one of the most effective ways to build awareness and interest with manufacturers.

228
product trials in
67
cities
since 2014

Transform Furniture

This firm started out by specializing in modular kitchen systems before expanding into cabinetry and furniture. Looking to use more sustainably sourced wood for furniture making in its new VIBE line, the company was drawn to western hemlock due to the light weight, light colour, and certified sourcing of the B.C. species.

The product trial included the design and manufacturing of chairs. The results were very well received, both in terms of the manufacturing process and the final product. Transform Furniture is now working to incorporate western hemlock into its product lines.



Photos: Fil India

Minimal Stroke

Positioned in the premium furniture market, Minimal Stroke manufactures functional and high-quality furniture for indoor and outdoor segments. The company is known for a minimalist approach to design that draws on Japanese and mid-century modern elements.

Western hemlock was successfully trialed for a new sofa design, and the company now uses western hemlock in its furniture range.



Photos: FIL India

Wisart Design Studio

Wisart is a multidisciplinary interior design, architecture and furniture manufacturer that focuses on contemporary design. The company was interested in using Douglas-fir for furniture production due to its workability, colour and strength.

The firm was particularly impressed with the final appearance of the Douglas-fir, used to produce a trial lounge chair, and has since purchased more of the wood for follow-up projects.

Commercial demonstration projects

If a picture is worth 1,000 words, consider the value of a real-life demonstration over a marketing brochure or web page. This is the thinking behind the more than 180 demonstration projects that have been completed in India using B.C. species since 2014. Each of these projects works towards the end goal of greater adoption of B.C. wood use into structural and related non-structural applications by the design and construction communities.

Spanning residential, commercial, education, hospitality and tourism sectors, the projects use B.C. wood species in a variety of structural, finishing and furniture applications. Many of these projects are led by commercial partners, with FII India providing technical support and assistance in sourcing and using B.C. wood products.

FII India leverages each commercial demonstration project through follow-up promotion and incorporation into educational programs and seminars.





Photos: FII India



Parallel Hotel

Marketed as a high-end, boutique hotel in Udaipur in northwestern India, the architects of the Parallel Hotel needed to design a façade that reflected this premium positioning and could stand up to the harsh climate of Rajasthan (monsoon rains in the wet season and temperatures of 45 degrees Celsius during the dry season). A look that fit with the retro design of the hotel, including Art Deco-themed rooms, was also needed.

The architectural solution was the use of western red cedar on all exterior walls, in the rooftop restaurant and bar, and for ceiling finishings.

Cedar was chosen for its durability, termite resistance, good staining properties and ease of workability. FII India provided the building team with assistance in sourcing the wood, as well as guidance on proper handling, installation, and finishing to ensure that the wood performed well and met the project requirements.

Since opening, the unique look of the building has made it stand out in Udaipur and helped establish a reputation as the best hotel in the city.



Aura International Preschool

Aura runs a network of preschools that emphasizes a safe, respectful and stimulating environment for early childhood education. The company prides itself on paying attention to every detail of the learning experience, from the pedagogy to the quality of instructors to the physical environment of the classroom.

The school administration wanted to introduce greater flexibility to the classroom layout to foster more self-directed learning among young students. This required new study tables that were light enough to be easily moved but sturdy enough to stand up to constant handling.

While designing the tables, Nashik-based manufacturer, G Square Interior, explored various options for table legs. Western hemlock's quality, flawless finishing, and beautiful grains positioned the species as an ideal, practical solution.

Instill Architecture Interiors, the firm behind the project, drew inspiration for the table design from the shavings of colour pencils. This idea was creatively translated into the table's design, which features a wooden surface complemented by colourful edges. The design perfectly caters to the end users of primary school students.

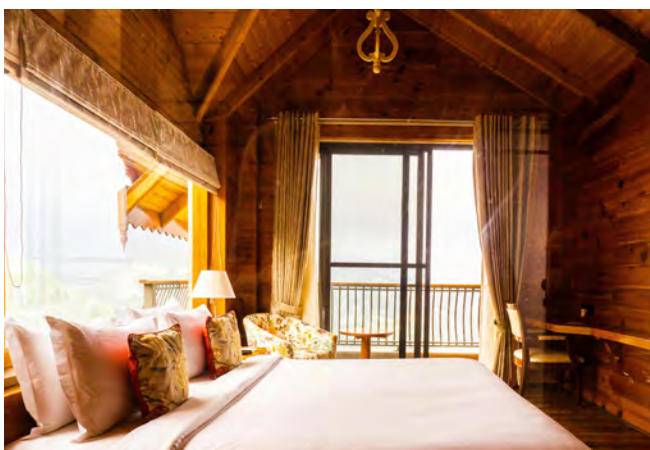
The attractiveness and high quality of the furniture has given it a very favourable profile in India's educational and institutional sector.



Photos: FII India



Photos: Fil India



Mandara Tree Villa Hotel

At an altitude of 6,000 feet, and facing the Himalayan mountains in Dharamshala, the Mandara Tree Villa Hotel is a luxury boutique villa nestled amongst a forest of pine trees in the village of Akhankhola. The hotel uses yellow cedar for the exterior façade, interior wall panels, ceilings, windows, doors, built-in units, staircases and other finishings. More than 1,000 cubic feet of B.C. wood went into the project.



The cedar used in the project was well received by both the builder—for its ease of use—and developer—for its final look and functionality. The hotel is doing well as a 5-star resort, and the builder looks forward to using more B.C. wood on his next project.

Expanding awareness and engagement



Photos: Fil India

While product trials and commercial demonstrations answer the “Why?” and the “How?” of using B.C. wood products, this information is only useful in marketing terms if it is shared with a wide range of stakeholders.

The FII India Market Development program does this through an extensive strategy of ongoing promotion, outreach, and education. These efforts include the use of social media, trade shows, seminars, workshops, and training programs.

Total impressions
26,810,151
Across Facebook,
YouTube, LinkedIn
and Instagram

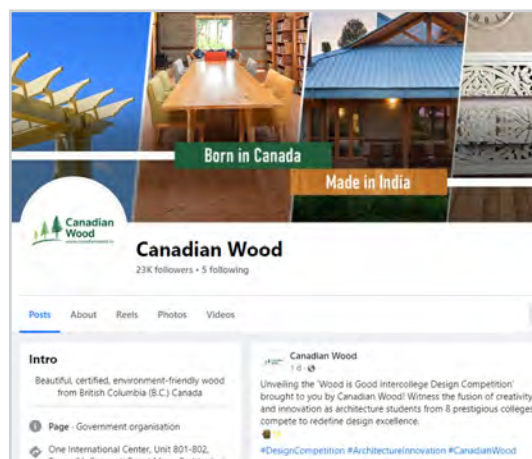




Photo: FII India

Trade shows are a well-established marketing vehicle in both B2B and consumer sectors. While social media and traditional media have greater reach, trade shows let prospective customers see the application of wood in various uses, promote dialogue through direct contact with stakeholders, and support cross-promotion of seminars, workshops and other educational initiatives.

Each year, FII India uses trade shows as a cornerstone of marketing activities.

Promoting the Canadian Wood brand through trade shows

Index Fair

Promoted as India's premier interior design exhibition, Index Fair connects FII India staff with the specifier community. In 2023, the FII booth showcased a wide range of interior and outdoor furniture using five B.C. species: western hemlock, Douglas-fir, yellow cedar, western red cedar and S-P-F.

FII used the trade show to showcase information about B.C.'s certified wood products and stringent forest management practices. This reflected the growing supply chain emphasis on sustainably sourced products.

FII India also participated in a panel discussion, "Furniture for the Future." The discussion emphasized the importance of sustainable materials in furniture design, providing attendees a comprehensive understanding of the latest trends and best practices.

18,809

**total visitors
over 3 days**



Photos: FII India



Photos: FII India

“Wood you believe it?” IndiaWood 2024 draws large crowd

With more than 950 exhibitors at one of the largest annual trade shows in India, the FII team knew it needed an exceptional booth to draw a crowd at IndiaWood 2024. The solution was a booth featuring a high-end luxury hotel suite. Furniture, doors, woodwork, and panelling were all built from B.C. coastal species by Indian manufacturers. This both appealed to the resort sector—a target of the marketing program—and demonstrated the suitability of Canadian wood to local manufacturers. The booth generated high traffic, with 1,500 visitors from about 570 companies. More than a third of these visitors were furniture and wood product manufacturers—the primary target of the market development program.

The strong turnout to the booth was generated, in part, through extensive advance publicity using the “Wood you believe it?” tagline. Targeted emails and posts to various social media sites ensured that key influencers were well aware of the booth. Follow-up media relations generated news coverage in 17 online and print publications.

Expanding understanding capacity through training

Training programs and workshops help to build capacity within India to use B.C. wood products through informative, educational programs. These programs provide an introduction and background to the wide variety of B.C. wood species, and they explain the concept of sustainability and the process of product certification. Education also covers details on how to use B.C. wood products in different applications.

The format of programs varies by need and opportunity, including face-to-face, virtual, or blended.

When partnered with professional associations, regulatory bodies, or academic institutions, FII India's educational programming can provide credits towards achieving or maintaining trade or professional accreditations.

Architectural focused seminars—Bengaluru and Delhi

With an objective of creating awareness about Canadian wood and its applications, two seminars were held in early 2024, attended by about 45 architects and faculty members. The seminars were conducted in Bengaluru and Delhi with a local expert as a visiting speaker along with the Canadian wood team.

Seminars were tailored for architectural college faculties to share knowledge on how wood is a sustainable material and on the features and applications of Canadian Wood species. The seminars highlighted why Canada is a sustainable and certified supplier of legally harvested wood. The speakers covered a wide variety of topics including “Wood as a sustainable, eco-friendly and renewable material”, “Canadian wood—Sustainable and certified”, and “Wood in architecture and design”.

41

Education events in 23/24 (workshops, seminars and webinars)

Training workshop—Lovely Professional University, Jalandhar and Guru Nanak Dev University, Amritsar

About 65 students and faculty of architecture at each university attended a workshop on “Wood in Architecture, Interior & Furniture Design” in the fall of 2023. Each program started off with a session about Canadian wood, and the discussions then transitioned into a session on the benefits of building with wood, certification and sustainability, and the commercial, technical and health/biophilic benefits of wood. This was followed by an overview of Canadian wood species, features and applications. The sessions wrapped up with a “wood in architecture” presentation including a hands-on exercise using western hemlock.



Photos: FII India



Photos: FII India

Centre of Excellence featuring Canadian wood

In a unique partnership, FII India has collaborated with a leading training institute to open a Centre of Excellence for training in wood manufacturing. The agreement includes a physical training centre at Caple's facilities in Mumbai, with FII hosting events and workshops developed in partnership with the Furniture Fittings Skill Council (FFSC)—an industry-led, non-profit organization operating under India's Ministry of Skill Development & Entrepreneurship (MSDE).

The new facility covers 13,000 square feet and features hemlock, S-P-F, Douglas-fir, and western red cedar, all from B.C.

Through the centre, FII India aims to educate, upskill and empower carpenters, machine operators, and production managers in handling, manufacturing and machining wood through a regular series of training programs developed by FFSC. Sustainable wood and production practices will be highlighted. The facility will also provide a platform to showcase and promote B.C. wood products, elevating the market reach of the Canadian Wood brand.



Vietnam

As one of the fastest-growing economies in Southeast Asia, Vietnam's demand for wood products continues to soar, driven by urbanization, infrastructure development and a thriving furniture manufacturing industry.

A decreasing supply of traditionally used hardwoods alongside the rapid growth of furniture manufacturing, has led to an increase of softwood lumber imports. Vietnam has also increased its emphasis on certification requirements, as more countries and major companies look to sustainably source products. As B.C. is one of the world's largest suppliers of certified lumber, these trends bode well for sales growth in Vietnam.

FII is leading a market development program for B.C. wood products in Vietnam in close collaboration with industry and the Canada Wood Group. The program is in a pre-commercial phase with a focus on building the Canadian Wood brand, introducing B.C. wood species into the furniture manufacturing sector, building local technical capacity and strengthening relationships with stakeholders.

Photo: FII Vietnam

Trade Minister's visit boosts B.C. profile in Vietnam



Photos: FII Vietnam



B.C. Minister of State for Trade Jagrup Brar's visit to Ho Chi Minh City in the spring of 2023 was an important milestone in B.C.'s trade relationships with Vietnam. The event was the first official visit by a provincial minister to Vietnam since FII Vietnam's office opened in 2022.

At the event, Minister Brar engaged with representatives from furniture associations, manufacturers, wood importers, and the Canadian Consulate General. The Minister used the event to reinforce to Vietnamese stakeholders the commitment of B.C. to the Vietnam market and the benefits of sourcing softwood from B.C.'s certified and sustainable forests. He also engaged with Vietnamese industry representatives on opportunities to expand B.C. wood use in furniture manufacturing and interior finishings, such as through demonstration projects and product trials.

Targeting the wood in manufacturing sector



In 2023, global imports of wooden furniture from Vietnam reached CAD \$13.6 billion. This represents a decrease from \$16.8 billion in 2022, likely due to a slowdown in the global economy. However, Vietnam's furniture exports have shown steady growth over the past decade, solidifying its position as the world's second largest exporter of wooden furniture, behind China.

This growth means Vietnam has an increasing need for certified softwood lumber. To introduce B.C. softwood species, FII uses product trials—providing manufacturers with a small amount of wood to use and test in their product lines, education on the species and characteristics of the wood, and technical support on handling, machining, and finishing the wood. The result has been a positive uptake of B.C. wood use by manufacturers, as well as broader awareness across the wood in manufacturing sector of the many attributes of B.C. species.



Photos: FII Vietnam

Happy Furniture, an established Vietnamese manufacturer of ready-to-assemble furniture, has introduced a new product line made from western hemlock following successful product trials supported by FII. Through the “Try Canadian Wood” program, FII Vietnam provided the firm with samples of B.C. wood, technical support, training seminars, and follow-up contact with B.C. suppliers. The results of the product trial were so favourable that the firm plans to use more western hemlock for higher-end furniture design.

Happy to use western hemlock



Photo: FII Vietnam

High-end manufacturer drawn to B.C. coastal species

Maker Sixty-Four (M64) is a Vietnamese furniture manufacturer targeting the higher end of the consumer market. Focused on quality materials and superior craftsmanship, M64 agreed to a product trial using Douglas-fir for the firm’s District Eight product line.

The trial was successful and the species is now used for tables, chairs and cabinets. This represented a major shift by the company, as it had historically only manufactured furniture from hardwood (oak, hickory and birch).

M64 is now product testing western hemlock as a further extension of B.C. softwoods in the company’s product lines.



Western hemlock table | Photos: FII Vietnam

Achieving a new look

In a strategic move to achieve an antique and rustic look, Nha Vui Furnishing is considering western hemlock from B.C. as a replacement for white oak. The move reflects growing consumer interest in lighter wood finishings over the heavier, darker tones typically associated with oak.

To support this transition, FII offered the firm a product trial, and they were pleased with the manufacturing results and the appearance of hemlock. Pending customer approval, Nha Vui Furnishing plans to introduce western hemlock into its product lines.

60th anniversary leads to WRC product line

Fri Form, a Swedish designer of outdoor furniture, wanted to celebrate their 60th anniversary with a high-end product offering. They were interested in using western red cedar (WRC) rather than their standard product lines of aluminum and pine, but had no experience with the species. FII worked with Fri Form and their Vietnamese manufacturing partner to product trial WRC. The trial was successful, leading to their use of WRC for a high-profile special anniversary edition product line.



Photo: FII Vietnam



Photo: FII Vietnam

Linea Coevo (LC), a Canadian furniture designer, wanted a new look for its product lines of bedroom and living room furniture. Through FII's trade show space at the 2023 VIFA Expo, the firm was introduced to the Canadian Wood brand and concluded that coastal species could meet this need. FII then worked with LC's Vietnamese supplier to product trial western hemlock and Douglas-fir, with favourable results. The firm is now finalizing plans to integrate coastal species into the firm's product lines.

Trade show leads to new line of Canadian-Vietnamese furniture

Building the Canadian Wood brand



Photo: FII Vietnam

Building brand awareness is a major component of the FII market development strategy in Vietnam, as a higher profile leads to more interest by manufacturers in product trials, with the end goal of commercial relationships with B.C. suppliers.

The marketing and communications strategy in Vietnam is focused around building the “Canadian Wood” brand as

research showed this approach had the greatest impact with manufacturers and compliments efforts in other Asian markets, including Japan, South Korea, China, and India.

Activities include direct contact with prospective customers through trade shows and other events, media relations, and communication outreach to key audiences through social and traditional media.

Connecting with key audiences through trade shows

Under the Canadian Wood brand, FII uses trade shows to promote B.C.'s forest practices and wood products, and to connect directly with Vietnam's manufacturing and furniture sector. Each year FII's booth is updated to reflect top-of-mind issues, such as those related to forest product certification, or wood quality.

At the 2023 VietnamWood show, the booth featured 153 hemlock panels placed upright to create a captivating forest-like scene, emanating wood's natural warmth, beauty and sustainability.

For this year's 2024 HAWA and VIFA Expos, the booth included a colour wall. Similar to a colour-coordinated bookshelf, the wall displayed B.C. coastal species stained in various shades using the same coatings used by Vietnamese furniture manufacturers. This approach reinforced the diversity of B.C. species and how they can easily be used to replace some hardwoods often used by furniture makers.

To further reinforce the ability of B.C. species to meet local needs, samples of locally manufactured furniture were featured in each booth. These showcased western hemlock, Douglas-fir, western red cedar and yellow cedar. Sample racks of lumber rounded out the displays.

Each booth was visited by several hundred industry professionals, including furniture manufacturers, lumber importers/distributors, local architects, designers, builders, real estate developers, contractors, universities, and government/trade associations. These connections often led to product trial requests. During each trade show, FII leveraged the profile of the booth with networking events and outreach to local news media.



Photos: FII Vietnam

Media program amplifies brand reach

Using a combination of advertising, earned and social media, the marketing strategy in Vietnam uses a range of communication platforms to reach a large and broad audience. Leveraging major events and a vast manufacturing industry, key messaging positions B.C. as a sustainable choice for both indoor and outdoor furniture applications. Trade and interior design magazines are included in the media mix to raise awareness on the advantages of using B.C. species.

The marketing strategy is supplemented by Facebook and LinkedIn posts, which provide new and engaging content, as well as a direct line for stakeholders to contact FII. The FII Vietnam website continues to see growth in visits, downloads, and referrals.



Photo: FII Vietnam

Expanding awareness and technical capacity through training and education

As a wood manufacturing sector that has historically built with hardwood, Vietnamese stakeholders need education and training programs to introduce them to the many benefits of softwood and certified wood sources.

A wide range of topics are covered through seminars including an overview of B.C. species, sustainable forest practices, certification, and chain of custody in the B.C. forest industry. Training on how to properly use and handle B.C. species is also an important part of educational programming.



Photo: FII Vietnam

Tavicohome Viefurn 365 Wooden Furniture Expo seminar

Drawing on attendance of the popular trade show, the seminar at the Tavicohome Viefurn 365 Wooden Furniture Expo centred on the theme “Canadian Wood—Excellent Matching & Finishing Properties from Sustainable Forests”. The presentation provided participants with an introduction to the Canadian Wood brand (FII Vietnam) and a comprehensive outline of B.C. species, their applications and characteristics, and the benefits of sourcing wood from B.C.’s certified and sustainably managed forests.

Industry Resources

Forestry Innovation Investment (FII) produces a variety of resources intended to help support the growth and development of the B.C. forest sector—all of which is available to industry free of charge.



B.C. lumber being loaded for export | Photo: Nik West

BC Research Library

The BC Research Library houses resources on a wide variety of topics relevant to the B.C. forest sector, including market and export data, sector reports, as well as product, technical, building/construction and environmental information—all of which is funded and commissioned by FII and its funding recipients.

Visit bcfii.ca/research-library



B.C. Interior forest | Photo: Michael Bednar

Image Library

Recently updated to improve accessibility and user experience, FII's Image Library has over 7,000 images and video clips showcasing everything from B.C. forests and forestry activities to manufacturing, building and construction, as well as trade and overseas market uses of wood products. All visuals are available to the B.C. forest industry and stakeholders at no charge, resulting in \$378,200 in savings to the B.C. forest industry in 2023/24.

Learn more at imagelibrary.bcfii.ca

We welcome your comments on any aspect of our website, resources or programs.
Please feel free to get in touch with us at info@bcfii.ca.



Western hemlock | Photo: Kristin Charleton, Sundew Media

naturally:wood

naturally:wood is an information resource showcasing British Columbia as a global leader in wood construction and a supplier of quality, environmentally responsible wood products from sustainably managed forests. Topics covered range from the latest research in wood performance, calculating carbon, code development, prefabrication, mass timber construction, B.C. forestry management practices, and much more.

Visit naturallywood.com



B.C. lumber stacks | Photo: Nik West

B.C. Wood Supplier Directory

The B.C. Wood Supplier Directory connects buyers with approximately 400 suppliers of high-quality, eco-friendly wood products, from dimension lumber, mass timber and engineered products, to furniture, doors and windows, panels, pulp, paper and pellets.

Browse the Supplier Directory and/or ensure your business listing is up to date at suppliers.naturallywood.com



Cross-laminated timber installed during construction of the Earth Sciences Building at the University of British Columbia | Photo: KK Law

Think Wood Research Library

Developed and maintained by FII, the Think Wood Research Library connects researchers and practitioners to the latest research and resources on mass timber, light-frame wood building systems (five storeys and up). The database has over 2,750 research resources, with links to download reports and information.

Visit research.thinkwood.com



BCFII.CA



NATURALLYWOOD.COM

CORPORATE OFFICE
1200 - 1130 WEST PENDER STREET
VANCOUVER, BC CANADA V6E 4A4
T 604 685 7507 | F 604 685 5373
INFO@BCFII.CA | WWW.BCFII.CA



**Forestry Innovation
Investment®**

