

Forestry Innovation Investment

# Forestry Innovation Investment Year in review 2024/25



## The Exchange

The Exchange is a four-building development in downtown Kelowna's north end. With its exposed mass timber structure, this mixed-use office and commercial project was designed to attract tenants with its sustainability and industrial vibe, while supporting local business through its construction. It offers proof-of-concept for nail-laminated timber (NLT) manufactured onsite, validating mass timber for high-performance buildings capable of meeting Step 3 of the BC Energy Step Code.

**To learn more about this project and the many other innovative wood buildings across B.C., visit [naturallywood.com/projects](https://naturallywood.com/projects).**



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Year in review 2024/25

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# Message from the Minister

The Province recognizes the delicate balance between economic prosperity, social well-being, and environmental stewardship when it comes to B.C.'s forests. We also recognize that generating greater value from our forest resources in the uneven terrain of climate change, geo-political trade, and economic uncertainty requires foresight and diligence.

That's why British Columbia is proud to be recognized globally as a leader in sustainable forest practices, wood product innovation, and the advancement of low-carbon construction solutions. Our forest sector plays a vital role in our economy, our communities, and our path toward a cleaner, more sustainable future.

This year's report reflects the continued strength of that leadership. Through Forestry Innovation Investment (FII) and its partners, we have been promoting B.C. wood products around the world, demonstrating that our forests aren't just a resource; they're part of the global climate solution.

Through value-added accelerators, we're making connections between B.C.'s value-added companies and First Nations communities. These partnership opportunities honour tradition, respect land, and foster growth. As we plan and protect for future generations, we are notably proud of the role FII is playing in supporting Indigenous knowledge and youth engagement through projects like *Good Talk in the Forest* that connects young people and community leaders across five First Nations communities.

We are also making investments in local economies to retool to more value-added products. The BC Manufacturing Jobs Fund program has incentivized more than \$680 million flowing into forestry-product manufacturing, leading to the direct creation and protection of more than 3,500 forestry-sector jobs, many in regional, remote and First Nations communities. This helps ensure that each tree harvested translates into more jobs and lasting prosperity.

On the international stage, FII outreach continues to support the goals of B.C.'s Trade Diversification Strategy by generating new export opportunities for B.C. forest products. Diversifying away from the United States, who continues to impose unwarranted duties on Canadian softwood lumber, provides greater export market stability. FII has helped forge new connections and strengthened bonds around the globe including in India, Vietnam, Japan, South Korea, and China.

FII's naturally:wood platform continues to serve as a key connector for global audiences seeking sustainable wood solutions. This year, the platform drew hundreds of thousands of views, connecting buyers to B.C. wood products. From Canada to the U.S., China, India, Singapore, and Germany—the B.C. Wood Supplier Directory put our high-quality products in the hands of builders across the globe.

Whether it's expanding the use of mass timber across Canada, responding to growing interest in sustainable design, or showcasing the role of wood in climate-smart construction, B.C. continues to lead by example—sharing knowledge, building partnerships, and embracing innovation.

Together with FII and other partners, we remain committed to building a strong, sustainable, and competitive forest sector that strengthens communities and delivers value now and for generations to come.

A stylized, handwritten signature in white ink, likely belonging to Diana Gibson, set against a dark green background.

Honourable Diana Gibson

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





# Message from the CEO

For more than 20 years, FII has been working with industry and key partners to develop and diversify markets for B.C. forest products globally. Today, with market turmoil in the United States reverberating around the world, this goal is more important than ever.

Fortunately, we have a multi-faceted response in place to protect forest communities and businesses across the province. Our strategy to diversify markets, with an emphasis on Asia-Pacific, has paid off. With our partners, we have established commercial markets for B.C. wood in China and South Korea, broadened demand in Japan, and are now opening up new markets in India and Vietnam. Asia-Pacific now accounts for close to 40 percent of B.C.'s forest product exports.

Along with diversifying where we sell B.C. wood products, our strategy focuses on broadening how softwood is used. This industry-wide effort, in partnership with regulators and research institutions, has opened up multi-storey markets to wood-frame construction here in B.C. The results can be seen across the province, where more than 80 percent of new mid-rise construction (five to six storeys) is built with wood. We have leveraged this success even further, by exporting this approach and technology through training and market promotion to export markets across North America and Asia.

Our third strategy is based on innovation—promoting entirely new uses of wood, such as mass timber. Through our Wood First program we are making B.C. a global leader in building bigger and taller with wood. To date, mass timber has been used for more than 480 buildings in B.C.—on a per capita basis, more than 18 times the North American average. And we are leveraging this expertise to open up new markets globally.

Of significant strategic importance, we target programs to support B.C.'s value-added sector. By offering market research, education and training, capacity building, promotion through trade shows and in-market missions, and an international in-market presence to deal with supply chain issues and support business development, the sector is actively developing new markets and market segments both here at home and around the world.

Further details on these strategies are outlined in this report. Going forward, we will remain highly focused on diversifying and building new markets for B.C. wood products in Canada and around the world. We look forward to continued collaboration with our many industry partners and, increasingly, closer ties with First Nations and other stakeholders. We welcome any and all feedback on this report or our approaches to market development and diversification.

Michael Loseth  
President & CEO | Forestry Innovation Investment



# 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. FII works with the forest industry and government to:

- develop and diversify markets for B.C. forest products at home and abroad;
- promote B.C.'s forest products and sustainable forest management practices to the global marketplace; and
- help ensure that the forest sector, through innovation, and strong domestic and international sales, continues to be a leading contributor to the B.C. economy.

Programs focus on developing markets for B.C. wood products in B.C./Canada and around the world. This includes in the major markets of Japan, China and South Korea, and emerging markets in South Asia, with a focus on India and Vietnam. Delivery is through in-market activities and co-funded programs that leverage the marketing networks and the expertise of trade associations and other partners.

FII also works closely with B.C.'s Trade and Investment Representatives as well as Canadian Trade Commissioners in select global markets. By leveraging these partnerships, FII is able to lead a comprehensive effort to diversify B.C.'s exports to major markets in Asia and North America and to foster greater capacity and innovation in the domestic manufacturing sector.

FII works closely with industry and government partners to advance priority markets and expand market segments, but also looks ahead to which potential new markets will hold promise for the industry in the future.

For more information on FII, visit [bcfii.ca](http://bcfii.ca)



# Programs



Coastal temperate rain forest in British Columbia



Pyramid Timber Associates wood-frame construction demonstration project, Mysuru, India | Photo: FII India



Castlegar City Hall | Photo: Gord Wylie, courtesy Structurlam and naturallywood.com

## Market Outreach

### Promoting B.C. forests and products around the world

The Market Outreach program positions wood as an environmentally responsible, preferred building material and highlights B.C. as a reliable supplier of quality products from sustainably managed forests. By providing credible, fact-based information, FII ensures that audiences in B.C. and globally understand that using wood from B.C.'s sustainably managed forests can help to address climate change and advance low-carbon innovation.

## Market Initiatives

### Diversifying and developing markets

The Market Initiatives program leads the development of export markets and new market segments, particularly in fast-growing Asian economies. This helps to diversify the sector, reduce market risk and open new opportunities in higher-value segments of the forest economy. Market Initiatives also focuses on growing high-potential sectors globally, such as multi-storey, mass timber and value-added products.

## Wood First

### Advancing innovation and capacity in B.C.

The Wood First program works with B.C.'s manufacturing, education, training, design and construction industries as well as government to advance wood construction technologies and expertise in B.C. FII then leverages this leadership to promote B.C. internationally as a leading source of technology, products and expertise for the use of wood in construction, interior design and daily living.

# Key Goals



**Promote B.C.'s sustainable forest practices and products**



**Expand global markets**



**Strengthen wood use in B.C. and across Canada**



**Advance innovation in wood construction**



Totem pole, Oweekeno village | Photo: Moresby Creative, courtesy naturallywood.com

Our work involves natural resources which are connected to many First Nations communities located in or closely associated with forests across the province of British Columbia. We recognize their connection to the forests and are grateful to those on whose traditional lands we reside, work, or visit.

In the spirit of reconciliation, FII acknowledges that its head office is situated in the traditional territories of the xʷməθkʷəy̍əm (Musqueam), səliłwətał (Tsleil-Waututh), and Skwxwú7mesh (Squamish) Nations.



# B.C. Strong! Working together for B.C.'s forest economy

## Collaboration and partnership support market growth and diversification

FII works in collaboration with the forest industry, First Nations, research institutions, government and other stakeholders who share our belief in the many benefits of using and building with wood. Together, we work to showcase B.C.'s unique position as a leading global supplier of forest products to the world, a centre of sustainable forest management practices and a leading innovator in the design and manufacturing of advanced wood products.

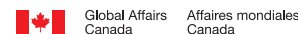
By coordinating efforts and drawing on the resources and expertise from industry and government, FII is able to maximize the effectiveness of its investments and position B.C. as a leader in innovation and market diversification.

In return, FII's many partners are able to improve their reach and effectiveness through access to the naturally:wood digital communication platform, participation in trade missions, research, media library, databases and links with B.C. and federal trade representatives.

## \$1=\$3.20

Every dollar invested by FII is supported by an additional \$2.20 in funding from industry and other partners. This year, FII's \$6.04 million investment in cost-shared programming was leveraged with partner contributions to deliver a total market diversification program of \$25.37 million.

**Affine** Climate Solutions



# Demonstrating B.C.'s leadership to the world



Alliance Française Vancouver | Photo: Ed White Photographics, courtesy naturallywood.com

## Building on our strengths— a strategic approach to market development

FII's market development programs start with the strengths of the B.C. forest economy. These include its sustainably managed forests; a diverse species mix suitable for construction and finishing applications; expertise in design, construction, and engineering; progressive building codes supporting advanced building systems; and high-quality wood and value-added wood products. These programs build on these strengths with messaging related to the benefits of building with wood, such as faster construction schedules, reduced greenhouse gas emissions, and more sustainable communities.

The resulting strong reputation anchors market development efforts around the world. Programs here in B.C. and in priority global markets are delivered in partnership with trade associations and other stakeholders to leverage their marketing networks and expertise through a mix of:

- Market research to understand local opportunities.
- Education and training, including professional development, educational seminars, and knowledge transfer to support building code and regulatory changes.
- In-market presence, including offices, direct connections with customers, trade shows, and meetings with key stakeholders.
- Demonstration projects and product trials to provide hands-on experience with B.C. wood products.
- Promotional campaigns for B.C.'s forest products and practices.
- Training to build local capacity for designing and building with wood and leveraging the benefits of B.C. wood species.
- Dialogue with officials to overcome trade barriers restricting B.C. exports.

FII's mix of program tactics is tailored to each market—such as Japan, China, South Korea, Vietnam, India and here in Canada—based on local opportunities and updated as market conditions change. For example, interest in mass timber is growing in many overseas markets. In-market programs are responding by sharing B.C.'s expertise and technical resources to kick-start local efforts, while promoting B.C. softwood as a preferred, sustainable wood source for these projects.



# Showcasing B.C. forest products and practices

Along with advancing B.C.'s reputation, FII shares with industry and other partners marketing tools and resources that reach across all markets. These resources are designed to support market growth, development and diversification around the world, and are available to B.C. industry stakeholders at no cost.

## 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. Through a monthly newsletter and across social channels, naturally:wood has created a community of over 11,000 professionals from around the world. The audience actively engages with naturally:wood content, such as the latest research in wood performance, carbon, code development, prefabrication, mass timber construction, B.C. forest management practices, and much more.

**Nearly 400,000 page views on naturally:wood**

**98K**

Exploring  
B.C. wood  
products

**88K**

Learning about  
B.C.'s diverse  
tree species

**63K**

Staying up-to-date  
on the latest in mass  
timber projects

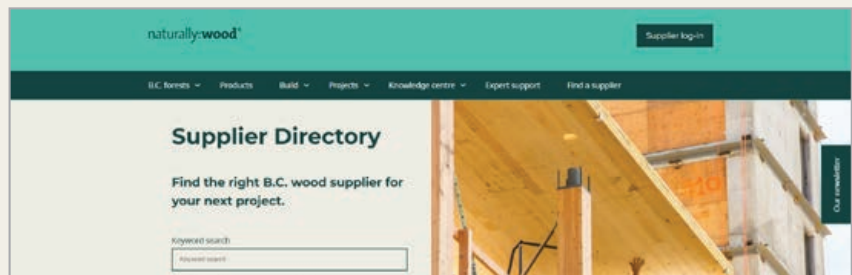
## naturally:wood Supplier Directory

As part of the naturally:wood platform, the Supplier Directory connects buyers with over 350 B.C. 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.

naturally:wood  
Supplier Directory saw

**35,000**

visitors from  
around the world







# British Columbia

Work by FII and its partners to advance wood use in B.C. is fundamental to the growth of market opportunities for the province's forest sector for two key reasons. First, with a growing demand for wood products, it creates a stable base of sales for our forest and value-added companies. Second, it positions B.C. as a leader in building products and wood technology that other markets can look to as they move to adopt modern, low-carbon building solutions. For these reasons, market activities in B.C. remain an important part of FII's overall market development strategy.

*The Hive (2150 Keith Dr) | Photo: KK Law, courtesy naturallywood.com*





*The Exchange | Jason Harding, courtesy naturallywood.com*

FII's Wood First program advances wood manufacturing, design and construction technologies and expertise, particularly in relation to next-generation products, building systems and practices, including taller structures, mass timber and prefabrication.

These efforts support not just the wood sector, but also opportunities for architects, engineers, developers, and construction companies—allowing supply chains to grow, and leverage the many advantages of constructing with and using wood from B.C.'s sustainably managed forests.

One way the Wood First initiative has made a difference is by increasing the use of wood in mid-rise and taller buildings. Wood is now used in more than 80 percent of all new 5- to 6-storey multi-family buildings, making it the top choice for this type of construction. Efforts to grow the production and use of mass timber have also been successful. Eight of Canada's ten leading mass timber engineering firms are located in B.C., which now has 480 mass timber buildings—the highest number per capita in North America.

This progress has positioned B.C. as a leader in sustainable and innovative wood-based products and building systems, providing direct support to FII's global market diversification program.

In the following pages, we outline the impact of our program in B.C., as well as those of our partners, to further establish B.C. as a leading exporter of forest products and advanced building technologies.

**480+**  
mass timber  
buildings

Home to  
**80%**  
of Canada's  
mass timber  
engineering firms

**18x**  
more  
mass timber  
buildings  
per capita in B.C.  
than the rest of  
North America

**350+**  
suppliers  
of a diverse range of  
sustainably-sourced  
forestry products  
operate across the  
province

## WoodWorks at BuildEx



BuildEx 2025 | Photo: WoodWorks BC

As western Canada's largest exhibition and trade show for design, construction, and real estate industries, BuildEx Vancouver was looking for ways to draw even larger crowds to its 2025 event. And with mass timber and wood construction top of mind with builders and developers, the obvious response was to offer delegates the latest insights on wood innovation and design.

BuildEx looked to WoodWorks BC, the industry-led program to increase the use of wood in non-residential, mid-rise and tall building construction through knowledge transfer and technical support.

With funding from FII, WoodWorks BC created a professional development program offering 14 wood-focused educational sessions, many promoting wood as a low-carbon building solution. More than 700 professionals attended, and almost 60 percent of them were new to WoodWorks training. Sessions were scored at 4.75/5, reflecting the strong reputation of WoodWorks BC with architects, engineers and other construction professionals.

## Value-added firms and naturally:wood connect with buyers



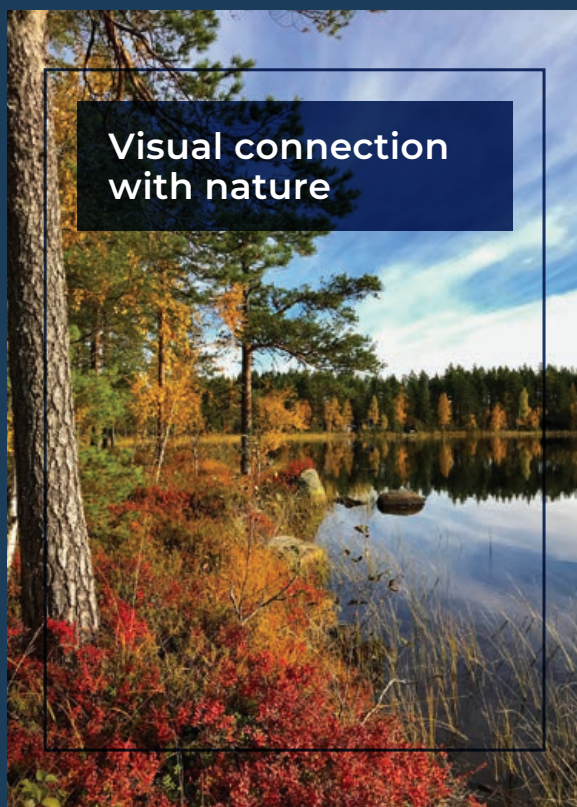
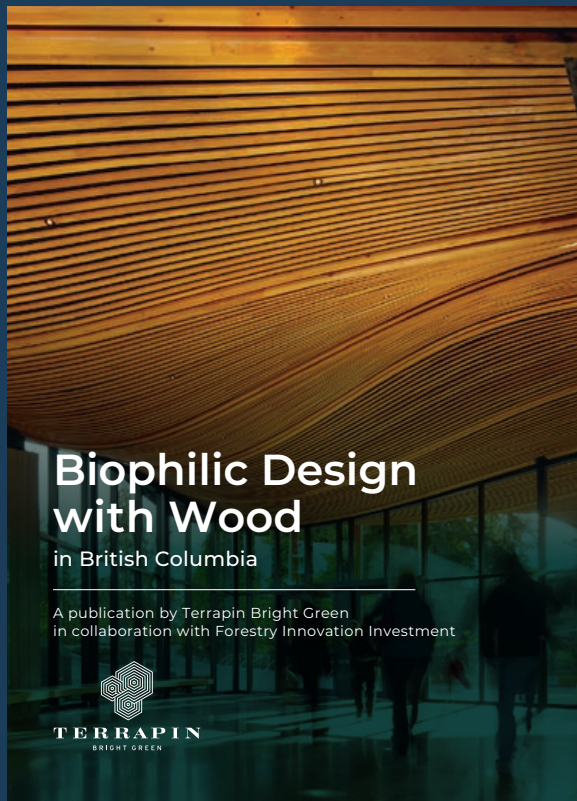
To leverage the interest in wood use created by the WoodWorks at BuildEx conference, FII, BC Wood and WoodWorks BC collaborated on a large trade show presence at BuildEx. Using the naturally:wood brand as the anchor exhibitor, 31 firms from across B.C. promoted their products and services to the construction industry. Response was robust, with the naturally:wood booth drawing nearly 600 visitors. Information requests were up 36 percent over previous years.

The coordinated presence at BuildEx by FII and its partners showcased the many benefits of a joint approach to market development: greater reach through shared promotion, greater impact through integrated content and messaging, and greater cost efficiency through shared resources and event staging.



naturally:wood at BuildEx 2025 | Photos: SitePartners, courtesy naturallywood.com





Biophilic design with wood in British Columbia, by Bill Browning of Terrapin Bright Green  
| Photos: Top - Nic Lehoux, bottom - courtesy Pixabay



BuildEx 2025 discussion panel: Biophilic Design with Wood: British Columbia. In photo: David Fell (Director, Research & Analysis, FII); Ryan McClanaghan (Architect, Associate, DIALOG); Natalie Telewiak (Principal, MGA); Lubor Trubka (Principal Architect, Lubor Trubka Associates Architects) | Photo: SitePartners, courtesy naturallywood.com

## Biophilic design promoted at BuildEx

Biophilic building design integrates natural elements—such as natural light, greenery, water features, and organic materials, including wood—into architectural design to enhance well-being, productivity, and sustainability. Living walls, rooftop gardens, and open layouts with natural views featuring mass timber are all examples of this approach to more closely integrate nature into our built environment.

Professional interest in biophilic design is growing, and to capitalize on this trend, FII partnered with Terrapin Bright Green to publish *Biophilic design with wood in British Columbia*. Launched in fall 2024, the publication provides designers with a short history of wood construction in B.C. and outlines a framework defining the eight patterns of biophilic design expressed through wood. The content was used as the basis for one of the training sessions at the WoodWorks at BuildEx conference. To date the book has had over 200,000 impressions on social media, more than 6,000 page views on [naturallywood.com](https://naturallywood.com) and 550 copies distributed.



# Nail-Laminated Timber

Canadian Design and  
Construction Guide



JULY 2024

Version 2.0

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## Wood First keeps B.C. on the leading edge of wood innovation

To maintain B.C.'s leadership in wood construction innovation, FII supports applied research and development of new wood products and building systems. Wood First funding helps give B.C. a competitive edge in new construction technologies and processes, including mass timber, prefabrication and industrialized wood construction. The cumulative impact of this research, as well as other expert efforts, has expanded the use of mass timber in taller buildings, including schools, libraries, and retail, enabling encapsulated mass timber construction (EMTC) up to 18 stories in the 2024 BC Building Code, in addition to other standards and best practice guidelines.

Last year, Wood First funded 16 research projects that addressed:

- **Fire Safety:** Research into performance-based design methodologies and fire safety requirements for taller mass timber structures.
- **Structural Design:** Studies explored balloon-framed cross-laminated timber (CLT) shear wall systems, as well as performance factors that are key to enhancing structural resilience, occupant comfort and alignment with building codes.
- **Building Science:** Investigations into moisture effects on self-tapping screw connections and connection performance under varying conditions to provide insights for building integrity and advanced connection design.
- **Other Technical Aspects & Code:** Research in acoustic performance, and cost-benefit analyses have furthered understanding of technical challenges and supported robust code development.

2024 also saw the release of the second edition of the *Nail-Laminated Timber (NLT) Canadian Design and Construction Guide*, co-funded with Natural Resources Canada, and updated with the latest research and project experience.



The Canadian Wood Construction Research Network is an interdisciplinary program—funded by FII, industry, Natural Resources Canada 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 FPIInnovations. Since 2023, the program has produced

30 peer-reviewed conference papers and 12 accepted peer-reviewed journal papers, contributing to the field.

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.

Collaboration remains central to the Wood First research program. FII is an active funder and partner in the Canadian Wood Construction Research Network (CWCNRN), working alongside Natural Resources Canada to align efforts and amplify impact across jurisdictions.

These efforts reflect Wood First's role in advancing innovation while supporting the broader B.C. value chain—from manufacturers to architects and builders—by building trust in wood-based solutions and informing best practices.



Research into design values for high-capacity shear walls with multiple rows of nails | Photo: FPIInnovations

#### **Evaluation of design values for high-capacity shear walls with multiple rows of nails, FPIInnovations**

The BC Building Code 2024 seismic provisions significantly increased seismic force requirements, which, under traditional construction methods, would require up to two double-sided regular shear walls for mid-rise wood-frame buildings. This reduces useable living areas, increases the cost per square foot and makes mid-rise light-wood-frame construction less competitive. To address this, researchers from FPIInnovations and the University of Victoria—with support from FII—tested new wall assemblies designed to prevent brittle failures and improve strength. The 2024–25 phase focused on validating new construction details using full-scale “de-risk” tests. These tests confirmed improved performance and provided data to support future updates to building codes, ensuring cost-effective, code-compliant wood construction remains feasible in seismic regions.





Wood salvaged during deconstruction project in Vancouver, B.C. | Photo: Dr. Haibo Feng



# Design for Deconstruction in Light Wood Frame

January 2025

Design for Deconstruction in Light Wood Frame | Photo: Kaia Nielsen-Roine and Hemi Patel

## Reduce, reuse, deconstruct— new guide to reduce waste in construction

When older buildings are replaced, much of the material ends up in landfill due to challenges with recycling. This represents a missed opportunity for carbon capture and reducing the environmental footprint of new building construction.

In response, experts at UBC's School of Architecture and Landscape Architecture (SALA) asked the question, "What if new building construction could be changed to make it easier to recycle buildings when they reach the end of their useful life?" The answer is outlined in the guidebook for *Design for Deconstruction in Light Wood Frame Construction*—a practical, scalable response to the mounting challenges of construction waste and embodied carbon.

Funded by FII, the project proposes minor but impactful changes to light wood framing construction, such as replacing nailed fasteners with screws, to lower the costs of material recovery. The guide is supported by full-scale mock-ups and practical tips.

# Mass Timber Demonstration Program

B.C. is a leading jurisdiction in North America in terms of mass timber/engineered wood design, manufacturing and construction with more than 480 projects completed or under construction to date. To help maintain this market leadership, the Government of British Columbia set up the Mass Timber Demonstration Program (MTDP) in 2021. Managed by FII, the MTDP provides targeted funding to offset the incremental costs associated with new and innovative mass timber projects, including technical research, design, prefabrication and construction.

Since the start of the program, \$9.1 million has been invested in 19 building projects and eight research projects, including six “tall” buildings (seven or more storeys in height). 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 downtown Vancouver.

To build knowledge and capacity across the design and construction sectors, FII profiles each project through its naturally:wood messaging platform and runs a communication program that includes project tours, case studies, social media, articles, digital promotion and videos. Market interest has generated more than 44,000 page views since the start of the program. Technical information and lessons learned for each project are also documented and shared with industry groups and government regulators at the provincial and local levels.



## **The Exchange: Showcasing exposed mass timber with on-site NLT fabrication in Kelowna**

The Exchange is a mixed-use office and commercial project that is anchoring the revitalization of the north end of downtown Kelowna. Featuring an exposed mass timber structure, the building is a hub for local entrepreneurs and professionals looking to network and grow their businesses in a genuine and amenity rich commercial community.

Construction of the project maintained the vision of the original Kelowna Growers Exchange—buy and sell locally—through on-site fabrication of building components by local trades. And by achieving Step 3 of the BC Energy Step Code, The Exchange shows that mass timber construction can both honour an historical legacy while achieving high building performance standards.

Notably, the practical insights and lessons learned from this project directly informed the development of the Canadian NLT Design and Construction Guide Version 2.0 (2024), shaping best practices for future mass timber projects across Canada.



## Alliance Francaise Vancouver: A first for the city

Alliance Française Vancouver (AFV) had outgrown its existing building and needed a new facility that would not only accommodate their growth, but also take advantage of its location in the heart of Vancouver's booming Oakridge development with a more iconic street presence. Serving many different uses, the new four-storey, steel-hybrid mass timber building features CLT floor and roof panels and exposed glue-laminated timber (glulam) beams and columns in the interior. This project demonstrates the suitability of prefabricated mass timber construction for urban infill projects while also being the first mass timber assembly occupancy structure over two storeys allowed to be built in the City of Vancouver.

The building features a 165-seat theatre, classrooms, an art gallery, artist studios, a demonstration kitchen, a large library with advanced digital media options, a public café, and a rooftop terrace for community gatherings. By leaving wood exposed to the interior, the project team created a natural and inviting space that is comfortable and welcoming to visitors. The complex structure was built on a tight, mid-block urban site with limited space for materials storage during construction. The project team saved time by specifying prefabricated CLT floor and roof panels, as well as pre-cut and prefinished glulam beams and columns.



Alliance Francaise Vancouver | Photos: Ed White Photographics, courtesy naturallywood.com





### **The Confluence: An energy-efficient mass timber civic space**

Mass timber and Passive House certification in a public sector building combined for the first time in Canada through construction of The Confluence, in Castlegar. Designed and built by a local team using regionally-sourced materials, The Confluence is a multi-purpose civic space housing the town's visitor centre, gift shop, economic development office and a co-working space.

To meet the stringent energy efficiency goals of a Passive House standard (targeting an estimated 80 percent reduction in greenhouse gas production compared to a traditional build), the project used prefabricated CLT panels. Manufactured locally and milled with computer-assisted precision, these panels were crucial in achieving the required airtightness and thermal performance of the building envelope. Their precision also contributed to rigorous quality standards and cost efficiency by streamlining on-site assembly, reducing labour costs and construction time.

*The Confluence | Photos: Matthew Bolt, courtesy naturallywood.com*



# Building the next generation of wood innovators

To strengthen the manufacturing and construction sectors' capacity in designing and building with wood and mass timber, FII funded programs targeting enablers—architects, engineers, contractors, developers—to deliver logical, cost-effective wood and wood-hybrid construction solutions.

BC Wood, through 88 WoodTALKS™ educational in-person and virtual events, connected 1,177 architectural, engineering, construction and design professionals with wood product manufacturers through seminars on the latest products and manufacturing techniques, with an emphasis on design and engineering standards.

WoodWorks BC increased knowledge on wood performance and best practices as they relate to seismic code changes and moisture management in multi-family, taller and larger buildings. 1,631 developers, design consultants, building officials, general contractors and construction managers in 250 companies were educated through webinars, workshops and tours.



WoodTALKS program | Photos: BC Wood Specialties Group



## Influencing the influencers

Practical tips and shared experiences are two effective ways to drive innovation and promote meaningful change. WoodWorks BC emphasizes these approaches in its engagement program with municipalities, developers, and project leaders.

At the municipal level, WoodWorks BC guided Vancouver, Kelowna and Richmond municipalities to adopt wood-friendly planning policies. Hands-on support to project teams helped overcome technical hurdles on timber building projects. Early support on an 18-storey hybrid timber tower project, for example, significantly shortened the design team's learning curve and gave them confidence to keep wood in the design.

To further raise confidence in advanced wood construction, the program is developing practical tools like detailed feasibility guides, business case studies, and construction success checklists.

Equally important, the new WoodWorks BC Network shares best practices and builds confidence in building up with wood. The network now connects 44 partner organizations in a peer-learning community through bi-annual forums.



WoodWorks BC seminar | Photos: WoodWorks BC





## Hands-on learning: design and manufacturing of prefabricated mass timber structures



*Design for Manufacturing and Assembly (DfMA) workshop, University of British Columbia |  
Photos: UBC Centre for Advanced Wood Processing*

Moving downstream from design professionals, FII supported the UBC Centre for Advanced Wood Processing (CAWP) and the UBC School of Architecture and Landscape Architecture in addressing knowledge gaps in the construction sector regarding mass timber.

At a Design for Manufacturing and Assembly (DfMA) workshop, architects, engineers, contractors, and manufacturers were introduced to the mass timber supply chain: design, off-site manufacturing, delivery, and rapid on-site assembly. Participants then took part in a design and assembly competition to reinforce the many benefits of DfMA: shorter construction time, less material waste, reduced costs, and labour savings.

Participants left the workshop with a greater understanding of the tremendous potential of integrated supply chain management as the future of construction projects in B.C.

## Strengthening supply chains and the manufacturing-building ecosystem

Over the past year, 475 professionals attended 40 UBC CAWP events, organized into three programs: Timber Tech Connect (TTC) events, the SHAPE prototyping series, and TWIG (The Wood Innovation Group).

TTC is a series of seminars highlighting British Columbia's advancements in mass timber and wood prefabrication offered collaboratively by the UBC Centre for Advanced Wood Processing (CAWP), the Wood Innovation Group and Fast + Epp.

Five TTC events brought participants inside some of B.C.'s most innovative timber buildings, including a session about the Mass Timber Demonstration program Vienna House (a seven-storey, 123-unit affordable housing project in East Vancouver) that explored key learnings from its prefabrication and mass timber assembly. Each event included members from the project team—developers, architects, engineers, and builders—offering honest, technical deep dives into material choices and design strategies.

Launched alongside TTC, the SHAPE workshop series offered five online sessions on topics like decentralized manufacturing and mass timber housing, with presenters from ChopValue, DIALOG, and Fast + Epp. These workshops extended technical learning opportunities to workers in the value-added industry who are new to the industry or existing workers who want to add to their knowledge pool.

Meanwhile, TWIG's 27 events continued to foster grassroots dialogue and networking, with in-person meetups in Vancouver and Squamish supported by a growing online community and regular newsletters. These gatherings—whether a Wood-First-Wednesday in a local workshop or a student field trip—served as vital entry points for the next generation of timber champions.

## Strengthening value-added manufacturing capacity and opportunities

Beyond educating specifiers, FII funds a series of targeted programs to improve the competitiveness of the value-added sector supporting forest sector manufacturers and building prefabricators.

In 2024, BC Wood delivered workshops to enhance management skills and knowledge, covering diverse topics from manufacturing programs to diversity and inclusion.

Both BC Wood and CAWP support the sector at the company level through targeted outreach services, which vary by client. For BC Wood, these may include branding strategies, leadership and sales coaching, digital marketing techniques, and business planning. For CAWP, their offerings relate to design, engineering, prototyping, and testing of new products, developing new product development procedures, conducting cost-benefit analyses, and improving production processes.



Timber Tech Connect | Photos: The Wood Innovation Group



As an agency of the Government of British Columbia, FII continues its commitment to activities that advance Reconciliation in the province and recognize First Nations' leadership in the forest sector.

This includes funding activities delivered by trade associations, First Nations organizations and other non-profit entities that support opportunities for Indigenous Peoples to be full partners in the forest economy.

## Exploring First Nations economic development involving wood

From traditional woodworking practices to modern forest management, First Nations knowledge and leadership are key to sustainability and innovation in B.C.'s forest sector. Recognizing this, and with funding from FII, BC Wood has actively fostered partnerships and provided support to First Nations businesses in the value-added wood products industry. Outreach in the past year included:

- Canadian Institute's 6<sup>th</sup> Annual Conference on First Nations Housing & Infrastructure West: Participated in discussions on funding and financing opportunities for housing and infrastructure.
- Assembly of First Nations (AFN) Circle of Trade: Hosted a trade booth for members to network and explore potential business opportunities with First Nation representatives.

Beyond trade shows, BC Wood engaged in community outreach through regional meetings to build relationships and explore opportunities for advancing value-added wood products manufacturing with First Nations leaders, industry, and government officials. Efforts also included collaboration with the First Nations Forestry Council (FNFC) aimed at supporting business partnerships.

One notable success story emerged from the Okanagan Indian Band, where BC Wood facilitated a partnership with a local prefabricated housing manufacturer. This collaboration aims to use the Band's timber resources to rebuild homes recently lost to forest fires, demonstrating the potential for mutually beneficial economic development.

Through these engagements, BC Wood is working to strengthen partnerships and support First Nations' growing leadership role in British Columbia's value-added wood products sector.



Regional outreach meetings | Photos: BC Wood Specialties Group

## Good Talk in the Forest—Construction Foundation of BC



Spaxmn community site tours of the new Quilchena Community Centre designed by MGA - Michael Green Architecture | Photo: Construction Foundation of BC

This year, the *Construction Foundation of BC* (CFBC) delivered Good Talk in the Forest—a powerful youth engagement initiative centered around cultural connection, career discovery, and community-led inspiration. The goal was to place Indigenous youth at the centre of conversations about the future of B.C.'s forest sector.

Spanning five Indigenous communities across British Columbia, the project hosted 32 sessions with 117 participants. Sessions brought together youth, community members, industry leaders, and traditional knowledge keepers in hands-on, wood-focused workshops including carving, furniture building, and tours of local wood-based infrastructure. These weren't just introductions to tools or trades—they were safe, reflective spaces for young people to explore how wood-based careers can align with their cultural identity and personal goals.

In Ahousaht, for example, participants carved feast bowls from locally harvested timber while learning about the community-run wellness centre—an inspiring example of self-determined, wood-built infrastructure on the site of a former residential school. In Upper Nicola, youth visited the CLT-built Quilchena Community Centre and heard firsthand from architects, apprentices, and builders how local wood is shaping their future.

The project also helped participants with real-world next steps, including job readiness, school registration, and access to support services. Many of the younger participants expressed interest in pursuing training in carpentry, design, or forestry—showing how the program is a model for trust-building, empowerment, and industry transformation.

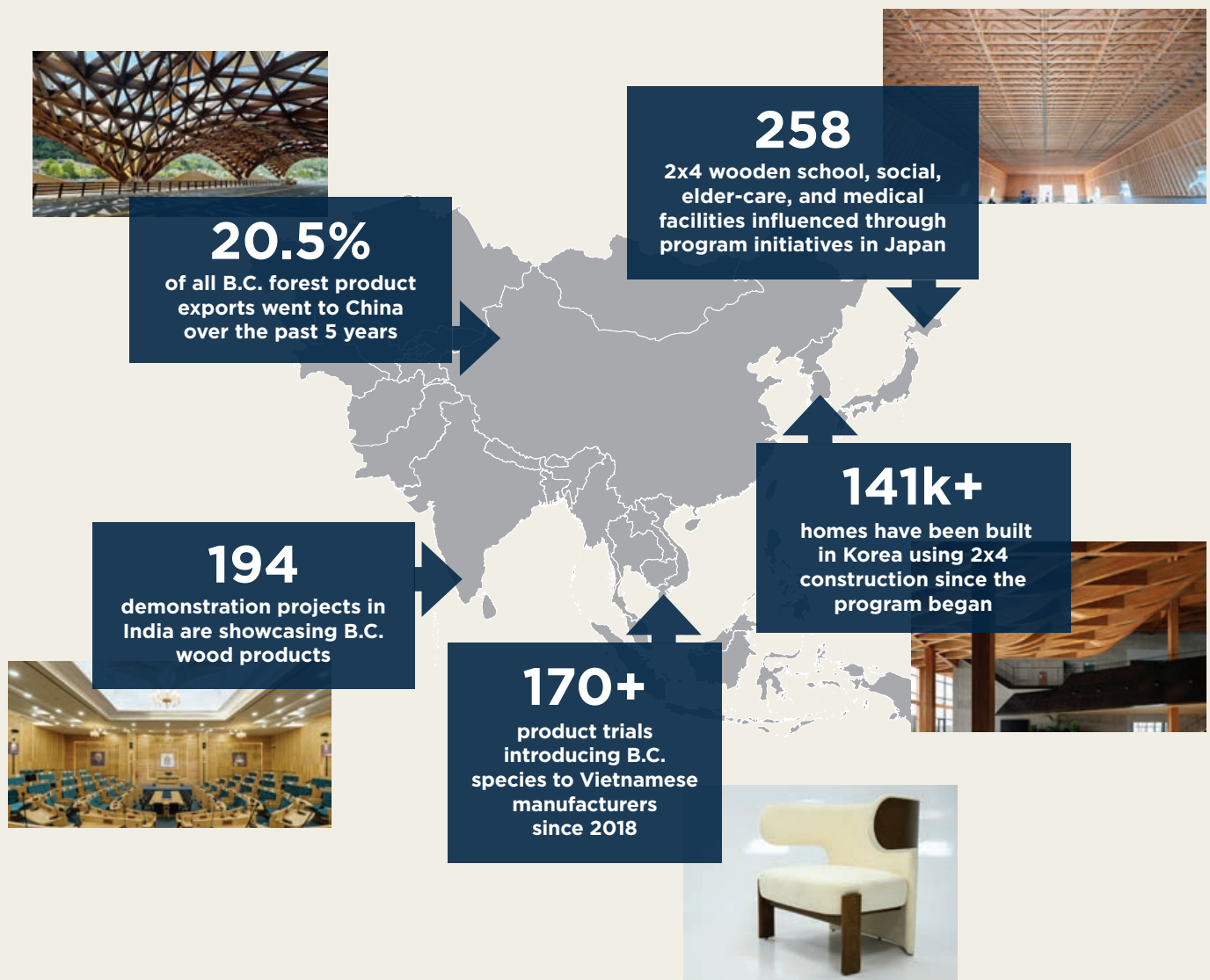


# Developing global markets

For more than 20 years, FII has been working to diversify B.C.'s wood exports around the world. Together, with industry and other partners, we have made B.C. a world leader in wood product exports.

The program's greatest successes have been in the large Asia-Pacific, a region that now accounts for close to 40 percent of B.C.'s forest product exports. We have created a commercially viable market for wood products in China and South Korea, while pushing B.C. wood products into new market categories in Japan. Together, these three countries now generate more than \$3.5 billion in forest product sales every year for B.C., including value-added and newer product categories, like wood pellets.

Looking to the future, the program has introduced B.C. wood products to the Indian and Vietnamese markets—each offering long-term growth potential. Further solidifying these markets, while exploring new regions and new potential markets, remains a key priority for FII and the industry.

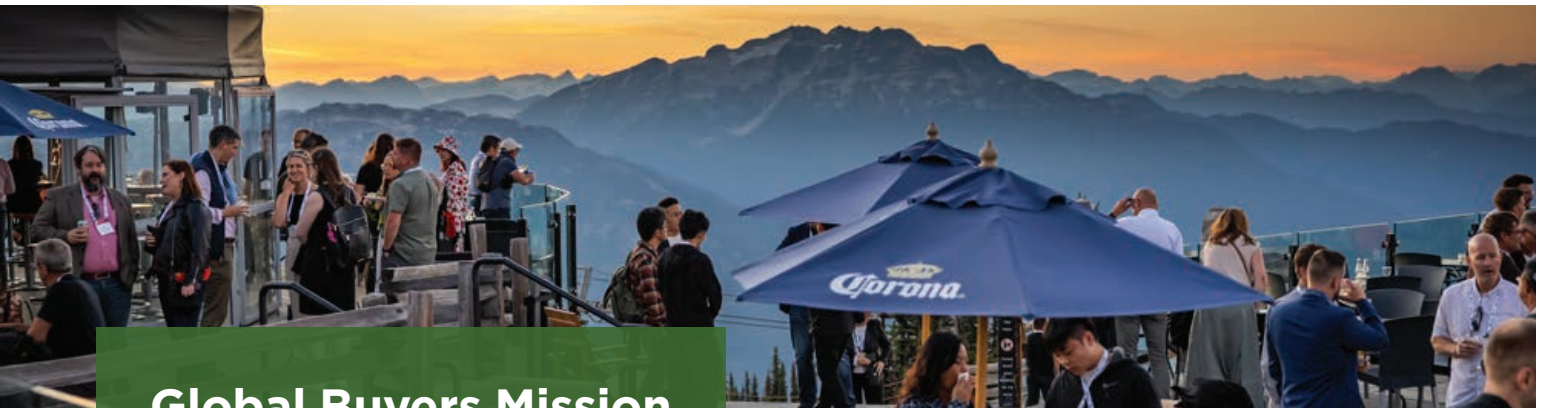


In all of these efforts, the marketing approach is to leverage B.C.'s strong brand and environmental pedigree. For example, as markets in Asia look to adopt modern building systems and low-carbon building products, FII and our partners in industry market B.C.'s leadership in mass timber and taller, wood buildings. We highlight B.C.'s proven record in sustainable forest practices. We showcase our wide range of wood species that our value-added sector leverages for market opportunity. We note the reliable trade linkages between our ports and those in Asia—B.C. is a safe and secure supplier of forest products in a time of rapidly shifting trade alliances.

As global demand for forest products continues to grow and evolve, maintaining our footprint in foreign markets is more important than ever. That is why we are constantly on the lookout for other opportunities, whether in the geographic markets of southeast Asia, or product categories, like mass timber, prefabrication or biomass.

In the following pages we report on our activities, and those of our partners, in various international markets to advance B.C. forest product sales and seize opportunities to further establish B.C. as the world's leading exporter of forest products and advanced building technology.

B.C.'s commitment to maintaining abundant, natural forests, while supporting forest community and First Nations values, positions B.C. favourably in international markets. FII maintains a strong market outreach program to communicate B.C.'s leadership in sustainable forest management, as well as leading forest product supply options and wood building expertise. Through the naturally:wood digital and social media platform and other marketing tools, FII ensures that this impressive record is positioned as a strategic advantage with stakeholders in B.C. and around the world.



## Global Buyers Mission highlights diversified approach to market development

*Global Buyers Mission 2024 | Photo: BC Wood Specialties Group*

Reflecting the global reach of the market development program, every year the Global Buyers Mission (GBM) brings over 200 foreign buyers from 16+ countries to network with B.C. firms in Whistler. It is Canada's largest event dedicated to promoting value-added wood producers.

Hosted by BC Wood with funding from FII, the initiative starts with in-market contact with potential buyers in foreign markets, like Japan or Vietnam.

This pre-qualification ensures the greatest return on the marketing dollar for the 85 B.C. firms that display at the trade event.

Whistler is used as the venue due to its world-class reputation and to leverage the many buildings that feature B.C. wood and mass timber construction. The event combines a trade show, educational seminars, networking and the opportunity for foreign guests to experience Whistler and B.C.'s natural beauty.

To further reinforce relationships, site visits and factory tours are organized for visitors that want to learn more about B.C.'s sustainable forest practices and value-added sector.

Steadily increasing attendance, by both foreign buyers and local firms, illustrates the impact and effectiveness of the GBM. Over the past two years, the event generated \$77 million in new sales for B.C.'s value-added sector.





# Japan

As B.C.'s largest market (by value) in Asia for wood products, Japan is a crucial market for FII's trade diversification and development strategy. With more than half of all new homes built from wood, but limited domestic timber supply, Japan relies on B.C. for quality lumber. And through dedicated market development efforts for more than 50 years by the B.C. forest sector, the program has been able to grow Japan's interest in using B.C. wood products. Starting with lumber and the introduction of 2x4 construction, interest has now expanded into B.C. mass timber, non-residential construction and prefabrication solutions.

Like B.C., Japan has a strong commitment to sustainability. Its efforts to combat climate change parallel those in Canada, creating a natural market for our advanced wood building systems that produce a lighter carbon footprint in construction activities. And, as a nation that borders the Pacific, Japanese customers have a strong demand for B.C. coastal species, including western red and yellow cedar, Douglas-fir, and coastal hemlock. This makes Japan a strong market for B.C.'s value-added firms.

Japan has a large population of aging individuals. This limits opportunities to sell more wood for residential housing, but opens up others, such as for senior care and other institutional buildings. Government policies, such as those related to achieving a carbon neutral economy, also create new opportunities for wood use.

The B.C. forest sector has led market development in Japan since the early 1970's and has partnered with FII since 2003 through the Canada Wood Group trade association. While continuing to target the residential sector, market development is increasingly focused on non-residential construction, advanced building systems, mass timber, and value-added opportunities. A separate campaign maintains B.C.'s leadership in the biomass (wood pellet) market.

*Makita Transport Sakuragi warehouse building | Photo: Makita Transport Co., Ltd.*

# Strategy highlights



The Japan market for B.C. wood products is unique in Asia as a market that is both mature and growing. The market strategy reflects this duality with goals of market protection (residential housing) and market development and diversification (non-residential construction, mass timber, value-added), linked by positioning wood as a climate friendly building material.

In the single-family residential housing sector, the program focuses on maintaining Japan as a large and high-value market for B.C. softwood lumber. Activities focus on customer relations, consumer promotion and social media, and countering competitive threats from other importers and protectionist trends in the domestic timber industry.

In multi-family residential and non-residential sectors, market development is working with local partners to promote wood use for larger and taller buildings. This is an area of extensive opportunities that range from multi-family residential to commercial, institutional, agricultural and hospitality use. In all cases, the program promotes the use of advanced wood building as a solution to these needs, and B.C. as meeting the Japanese expectations for high quality and sustainably sourced lumber. Across all sectors, the program supports ongoing research and development to remove technical barriers to wood use, alongside regulatory updates related to building safety, including earthquake resistance.

Efforts are also being made for B.C.'s value-added sector that target niche markets in resort, non-residential and renovation sectors. The market approach for the B.C. wood pellet industry focuses on maintaining B.C.'s position as a leading supplier through direct outreach to buyers and regulators.



*Makita Transport Sakuragi warehouse building | Photo: Makita Transport Co., Ltd.*





Canada Wood and the Council of Forest Industries 50-year anniversary in Japan | Photos: Canada Wood

**A golden anniversary—celebrating 50 years of close ties with Japan**

**4,500**

**fireproof wooden structures**

**156**

**wood mid-rise construction starts**

In November 2024, Canada Wood and the Council of Forest Industries (COFI) marked the 50-year anniversary of market development in Japan with a reception at the Canadian Embassy in Tokyo. The event, attended by nearly 200 stakeholders and customers, celebrated a half century of collaboration that transformed home construction in Japan.

Market development was launched in 1974 by COFI to create a new market for B.C. wood in Japan. Working closely with government officials led to the creation of a Japanese 2x4 building code for home construction, similar to that used in Canada. COFI House, built on the grounds of the embassy, alongside the “2x4 caravan”—a demonstration house program that constructed over 100 homes in 25 cities across Japan—successfully marketed the new standards to Japanese home buyers.

Results were spectacular, with 2x4 quickly established as a preferred choice for new homes. To date, more than 3.3 million homes have been built using 2x4 construction, many using B.C. lumber.

The combination of regulatory change, demonstration projects, and marketing promotions continues to be used in today’s market development activities, both in Japan and in other markets around the world. In Japan, the reputation for Canadian building systems established by the 2x4 campaign has been leveraged successfully for market expansion into multi-storey, hybrid, mass timber and related sectors.



# A+ trade mission strengthens partnerships and promotes sustainability



Trade missions of foreign buyers to B.C. are a powerful way to strengthen business relationships, promote B.C., and deal directly with misconceptions or knowledge gaps. Towards these ends, Canada Wood and COFI co-sponsored a mission of leading Japanese wood industry management in the fall of 2024.

The mission included tours of mass timber projects, information about First Nations partnerships, and visits to mills that produce wood products for the Japanese market. These site visits demonstrated the high-quality standards and testing used to ensure products shipped to Japan meet rigorous Japanese requirements.



Sustainability was a major theme throughout the program. A visit to a seedling greenhouse provided a first-hand look at how B.C. is sustaining its forests and actively working towards Canada's commitment to plant two billion trees over 10 years.

Delegates were impressed at all aspects of the tour—the quality of B.C. products, the sophistication of mills and manufacturing facilities, and the strong commitment to forestry sustainability. They rated the mission as 9.5 out of 10—an A+ relationship by any score.



*Japanese wood industry professionals trade mission to B.C. | Photos: Canada Wood*







Japan Federation of Construction Contractors site visit | Photos: Canada Wood

## Seeing is believing!

While 2x4 construction is widely used in Japanese home construction, it is far less common in commercial construction. This has created a knowledge gap and some reluctance by builders to try this “new” construction technique.

As part of the larger strategy to diversify wood construction into non-residential markets, Canada Wood has been networking with the Japan Federation of Construction Contractors, a group representing larger construction firms (with limited experience in building with wood).

Seminars to educate builders about wood construction were followed up with site visits to provide a first-hand look at wood construction techniques in larger buildings. This included traditional platform frame construction (2x4) as well as Midply Wall Systems, nail-laminated timber, and nail plate trusses built from B.C. lumber.

Participants said the events have given them a better understanding of the benefits of building with wood, including competitive costs.

## 2x4 keeps on giving



Like that famous Energizer bunny, the Canada Wood campaign promoting 2x4 construction “keeps going”. These promotional videos, running on COFI’s YouTube channel in Japan for eight years, have garnered a cumulative total of 5.2 million views. The campaign was a clever play on the Three Little Pigs children’s story, with seven videos promoting the attributes of 2x4 home construction as safe, sound, comfortable, environmentally friendly and energy efficient. The use of social media appeals to a younger demographic—the target market for new home construction.

A follow-up campaign is planned in 2025 as part of the ongoing strategy to expand 2x4 construction as a share of new home construction.

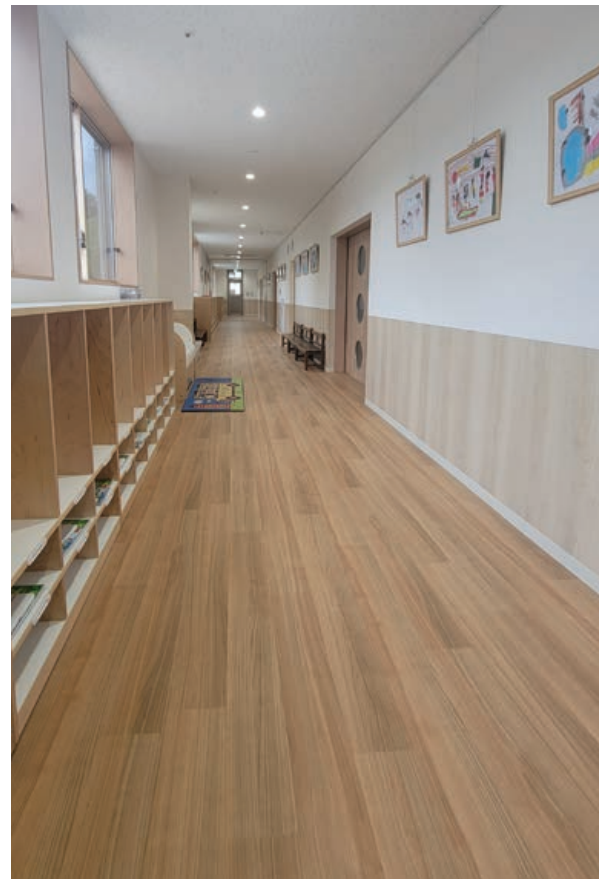


# Cutting edge wood construction



To speed the transition to wood construction, Canada Wood has a long-standing strategy in Japan of highlighting new projects using wood in underserved construction sectors. This approach supports the overall marketing goal of boosting wood consumption through market diversification.

The Asahi kindergarten is a case in point. The original concrete school was nearing the end of its useful life and needed a replacement with a newer look and feel. The developer chose wood construction for its ecologically friendly appeal, cost competitiveness, and speed of construction. The first phase of the project is now complete. When completed, the building will have used 320 m<sup>2</sup> of Canadian S-P-F and will feature a wooden roof span of 13.5 metres. Canada Wood is publicizing the school as an example of how wood construction can meet the needs of the education and institutional sectors.



*Asahi Kindergarten | Rendering and photo: Canada Wood*

# Case studies showcase expansion of wood construction

Demonstration projects using wood are often built as a test of the feasibility of wood construction—a pre-commercial undertaking. Case studies, in comparison, showcase buildings built as commercial undertakings. This provides even greater credibility to the benefits of building with wood. As a result, case studies are a foundational element of Canada Wood’s market development activities in Japan.

VOL.6 2025年 cofi.or.jp

カナダ産木材 建築 CASE STUDY

鉄道高架下に商業施設を木造で建設  
カナダ産木材で高品質な建物に

鉄道高架下という特殊な立地の商業施設を、ツバイオエ工法の木造で建設しました。カナダ産木材を使用することで高品質な建物を実現すると共に、コストダウンを実現しています。木造の良さを活かし、新築にササグサ材とカナダ産木材の組み合わせで高品質な建物を実現しました。

一戸建てのような雰囲気の木造商業施設

このプロジェクトは、駅前の鉄道高架下下の商業施設を建設するものです。事業主が希望していたのは、駅前の商業施設に似せつつも、一戸建てのような雰囲気を実現し、高品質な建物を実現することでした。カナダ産木材を使用することで、高品質な建物を実現しました。

VOL.5 2025年 cofi.or.jp

カナダ産木材 建築 CASE STUDY

カナダツグ羽根材を内装用パネルに加工  
建物内をぬくもりのある快適な空間に

木造物の内装材の加工として、日本の建築現場でカナダ産ツグ材、編組材、のり材を加工して、内装用パネルに加工しました。加工したパネルは、建物内をぬくもりのある快適な空間を実現しました。

建物の安全度を高めるカナダツグ羽根材

建物の安全度を高めるために、カナダ産ツグ材の加工を行いました。加工したパネルは、建物内をぬくもりのある快適な空間を実現しました。

VOL.4 2025年 cofi.or.jp

カナダ産木材 建築 CASE STUDY

ツバイオエ工法で木造耐火建築物の福祉施設  
信頼性が高いカナダ産木材を活用

ツバイオエ工法で木造耐火建築物の福祉施設を建設しました。カナダ産木材を使用することで、高品質な建物を実現しました。

中規模施設に適したカナダ産木材

このプロジェクトは、中規模施設に適したカナダ産木材を使用しました。カナダ産木材を使用することで、高品質な建物を実現しました。

VOL.3 2024年 cofi.or.jp

カナダ産木材 建築 CASE STUDY

中規模の事務所・倉庫をツバイオエ工法で建てる  
建設コストを抑えながら、強い建物に

中規模の事務所・倉庫をツバイオエ工法で建設しました。カナダ産木材を使用することで、高品質な建物を実現しました。

強度があり現場で使いやすいカナダ産 OSB

このプロジェクトは、強度があり現場で使いやすいカナダ産 OSB を使用しました。カナダ産 OSB を使用することで、高品質な建物を実現しました。

To promote wood component use in commercial construction, last year Canada Wood published a case study on new wooden warehouses built for Makita Transport, a logistics company in food warehousing and transport. Of interest, the builder chose wood truss roofing over steel alternatives for a warehouse with a 20-metre, column-free roof span. Makita was so impressed with the warehouse that it has since built a second one. Both warehouses used Canadian S-P-F dimensional lumber in the roof trusses and for the walls of the building, sheathed with Canadian OSB.

In the construction of taller office buildings, Canada Wood published a case study on an eight-storey tower built for AQ Group. AQ designed the all-wood building using technology and expertise they developed in their residential construction projects. The building includes engineered wood products, such as laminated veneer lumber beams and glulam, and Canada Tsuga (hemlock from B.C.).

The Tsuga was used as rafters to support the roof and heavy solar panels due to its strength, high nail retention and resistance to bending. This reduced overall lumber usage and costs.

Canada Wood publishes new case studies on a regular basis to promote new approaches to wood construction and to further diversify markets for B.C. wood products.

Forestry Innovation Investment | Year in review 2024/25 37





## Engagement and promotion boosts pellet sales in Japan

Biomass handling and storage methods seminar | Photos: Wood Pellet Association of Canada

B.C.'s market leadership in supplying Japan with wood pellets has been achieved through direct engagement with Japanese buyers and promoting the high quality and environmental merits (sourcing responsible fibre) of the pellets by the Wood Pellet Association of Canada (WPAC).

In 2024, the industry continued this two-part program. Ongoing promotion, including newsletter and search engine advertising, emphasized that all B.C. pellets come from responsible producers in a well-regulated country. And an in-market engagement program connected with more than 40 managers and staff through a training seminar.

Building on the valuable insights from a workshop held in 2023, the seminar included an in-depth exploration of biomass handling and storage methods and an introduction to bow-tie analysis, a cutting-edge approach to systematically assess the hazards of handling and storing biomass. The comprehensive agenda also covered causes of fires and explosions, ignition prevention, firefighting techniques and procedures, personnel safety, fire prevention methods, first responder training, case studies, and hazard analysis methods.

The workshop was hosted as part of WPAC's ongoing engagement program to maintain strong relations in Japan, B.C.'s largest overseas market for wood pellets. In 2024, B.C. pellet sales in Japan topped \$300 million.







Hirafu Village in Niseko, Hokkaido | Photo: BC Wood Specialties Group



BC Wood booth at Nikkei Messe 2025 | Photo: BC Wood Specialties Group



Seminar on B.C. value-added wood products, Niseko | Photo: BC Wood Specialties Group

## BC Wood targets Japan's ski resorts

With a large aging population, Japan is looking to international tourism as a new driver of economic growth. This includes promoting Niseko, Japan's top ski resort, as the Asian "Whistler". Doing so, however, means upgrading resort facilities, as they date back to the 1980s.

With developers looking to B.C. for inspiration, BC Wood Specialties Group saw an opportunity to turn interest into sales. Building on strong connections developed in Niseko through previous outreach, the BC Wood Japan office hosted an information session at the ski resort in February 2025. The event connected B.C. value-added firms with Japanese developers, architects and builders. Buyers were given first-hand exposure to the wide range of B.C.'s value-added services and products for ski resorts, including mass timber, villa and resort construction, and high-end finishings and furnishings.

The timing of the marketing event was linked to the Nikkei Messe trade show, the largest home show in Japan. Several B.C. firms were attending the trade show through a booth and outreach program sponsored by BC Wood. Adding the Niseko meeting to their itinerary helped the firms make the most of their marketing dollars and their outreach to the important Japanese market.

Efforts like this by BC Wood have made Japan the largest Asian market for B.C. value-added products.





# South Korea

South Korea offers unique trade potential as a strategic and high-value market for British Columbia's softwood lumber exports. The country's reliance on imported softwood, combined with government support for green building and the Canada-Korea Free Trade Agreement, creates ongoing opportunities for a wide range of B.C. wood products, including structural lumber, mass timber and value-added products. South Korea's preference for sustainably sourced lumber and societal trends favouring wood construction further enhance growth opportunities.

While South Korea may not be the largest market for B.C. softwood, it plays a crucial role in diversifying export risk for the provincial forest sector. This diversification helps mitigate the impact of market fluctuations in larger markets like the United States and China.

Recognizing the potential of South Korea, FII began funding market development programs in 2006. Efforts by Canada Wood led to rapid growth in 2x4 wood construction for single-family homes. With BC Wood, the program established a very strong brand presence for both B.C. value-added and Canadian advanced wood technology, including for multi-storey wood-frame construction, prefabrication, mass timber, and green building.

Because South Korea will continue to import more than 90 percent of its softwood lumber needs, and the government's strong commitment to green building using wood, future market opportunities in South Korea remain favourable for B.C.

*Hyoje-Dong Jongno-gu Social Welfare Building | Photo: Canada Wood*

# Strategy highlights

The strategic goals of the South Korea market development program are to build on the significant gains of past years: boost sales of B.C. softwood and value-added products, maintain strong brand and industry relationships, and increase value through penetration of new market segments, like mass timber.

The program initially focused on introducing wood-frame construction to the single-family residential sector, a highly price sensitive market with lower margins. In-market activities by Canada Wood are now targeting a wider range of opportunities that leverage B.C.'s strengths in high-quality lumber and building technology and deliver higher returns—including green building (energy efficiency), multi-family construction, and industrialized construction (prefabrication). Opportunities for mass timber, B.C. value-added products, and B.C. wood pellets are part of this targeted marketing approach.

Current activities focus on strengthening relationships with key stakeholders, identifying and responding to any barriers to the use of B.C. wood products or building systems, and growing demand in new and emerging market sectors.



*Seungsan Village project | Photo: Canada Wood*





Dagagu House | Photo: Canada Wood

## Code change opens up apartment sector to wood building

Ongoing work to support building code changes is an important part of the market development program, as it opens up new markets to wood use. For example, a recent building code change in South Korea, facilitated by Canada Wood, will open up the low-rise multi-family (apartment) residential market to wood construction.

Previously, due to concerns about sound passing between units, regulations required thick concrete floors in multi-family residential buildings of three to four stories (the Dagagu and Dasaedae markets). This made wood-frame construction less competitive to other building systems.

Industry professionals thought the regulation went too far, but lacked a coordinated response. Canada Wood helped the industry build a case for change, including technical input from the National Institute of Forest Science, and industry support from the Korean Wood Construction Association.

Regulators accepted the new research and changed the code. Since the multi-family sector makes up 80 percent of all new home construction, this change is a significant win for Canada Wood.



A midrise project in Korea that applies the Wood Infill Wall system using Canadian S-P-F | Photo: Canada Wood

# Trade mission strengthens ties with South Korea construction sector



Canada Wood trade mission to South Korea | Photos: Canada Wood

Since the start of market development in 2006, B.C. has established strong ties throughout the South Korea construction sector—on codes and regulations with government officials, on design with engineers and architects, and on wood construction with developers and builders.

Maintaining these strong ties is a fundamental part of the ongoing market development strategy.

Late in 2024, Canada Wood reinforced this commitment with a trade mission of industry leaders.

A highlight of the mission was the signing of a memorandum of understanding with the Architectural Institute of Korea (AIK). The agreement will foster collaboration in academic research and technological advancements for wood construction. Through this partnership, Canada Wood is providing specialized training to AIK member companies, which include some of Korea's largest builders and architects. During the signing ceremony, AIK President Jin Chul Park emphasized the importance of the partnership in advancing wooden architecture in South Korea.



# Less carbon? More B.C. expertise!

Supporting the early stages of government program development is an effective market strategy, as it leads to relationships and profile that can be leveraged into sales. Such is the case with South Korea's ambitious program to reduce overall carbon emissions.

Recognizing current methods won't meet the target for the construction sector to slash emissions by one third by 2030, South Korea is looking to the mass timber approaches developed in B.C. for eco-friendly construction. A three-year feasibility study, led by the Korea Land and Housing Corporation (KLHC), spearheads this effort. With input from Canada Wood, the study will clarify the regulatory and permitting needs for building a 12-storey, mass timber residential building by 2026. And to avoid future construction delays, it will outline approaches for using off-site (prefabrication) facilities to speed up construction and cut the carbon footprint with mass timber construction.

KLHC's collaboration with Canada Wood underscores the growing recognition that sustainably sourced wood from B.C. can help meet South Korea's growing demand for mass timber. The housing corporation hopes to use wood construction to achieve carbon neutrality objectives through high-quality, eco-friendly urban housing and construction.

LHRI Brown Back Seminar  
2024.11.12 (수) 12:00 - 대회의실

OSC 사업의 뉴 패러다임

## 목재기반 OSC 가능성과 LH사업 연계방향

토지주택연구원 박 성 식

Off Site Construction (OSC) with Wood and Tall Wood Mass Timber feasibility study | Photo: Canada Wood



LH Land and Housing Research Institute | Photos: Canada Wood



Seungsan Village project | Photos: Canada Wood

## Nailing down market leadership

Mass timber construction is quickly gaining interest in South Korea, with an increasing number of architects and developers interested in the technology. Capacity, however, has been an issue as there are limited facilities and skilled workers. This, in turn, impacts sales of wood products.

Canada Wood closed this gap by introducing builders to nail laminated timber (NLT) using B.C. softwood, a construction approach that can be ramped up much faster than other systems. This gave B.C. an edge over foreign competitors in supplying mass timber.

With supply established, Canada Wood then worked with local officials on several high-profile NLT buildings at Jinju City, one of the first uses of mass timber in South Korea. The comprehensive urban redevelopment has won a number of national awards for building design and is a showcase for wood's potential as a sustainable, cost-effective alternative to concrete and steel.

This partnership firmly established B.C. as a leader in mass timber technology and the sustainably sourced softwood needed to prefabricate mass timber building components.



# Seminar highlights

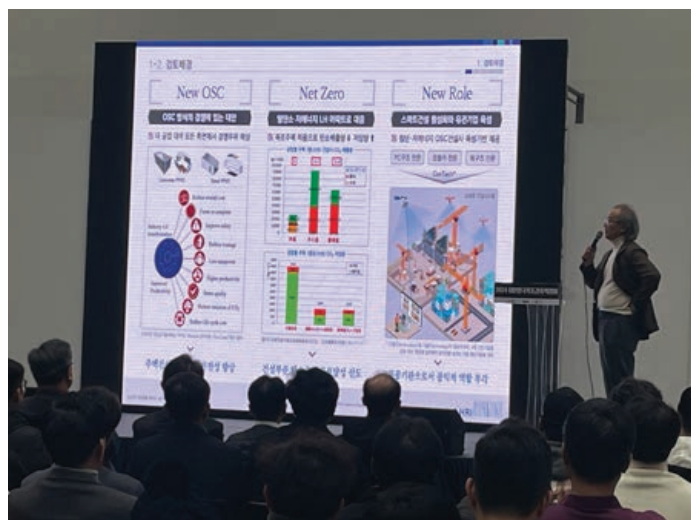
## B.C. mass timber leadership



To maintain B.C.'s position as the go-to source for mass timber construction expertise, Canada Wood sponsors an ongoing series of professional development seminars for building professionals. More than 360 engineers, architects and other professionals—a record turnout—attended the most recent symposium, showing the recognition given to B.C. expertise and to the growing importance of this emerging building sector.

Canada Wood sponsored the conference hosted by the Architectural Institute of Korea (AIK), the Korea Institute of Building Construction (KIC), the Korea Land and Housing Corporation (KLHC), and Dankook University. Canada Wood has technical and other working relationships with AIK, KIC and KLHC, giving it a leg up on competitors. The agenda included mass timber construction policy, innovations in construction techniques, and case studies showcasing mass timber use (featuring B.C. wood) in South Korea.

Canada Wood also sponsored a seminar on wood use for apartment construction (both wood-frame and mass timber building systems) at the Korea Wooden Building Expo. Held in collaboration with AIK and KIC, the event attracted 180 professionals and highlighted the growing interest in using wood construction for apartment building, a market traditionally dominated by steel and concrete.



Canada Wood sponsored seminars | Photos: Canada Wood



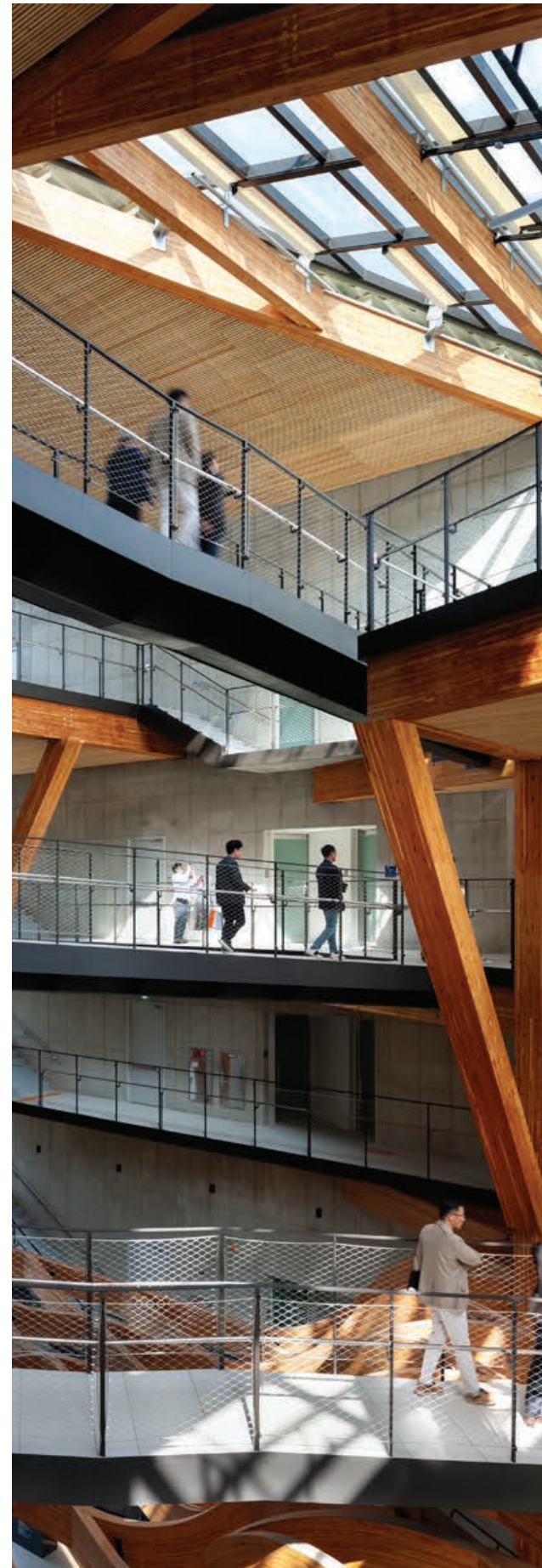
## Scaling up

Fueled by the national government's commitment to carbon neutrality and sustainable building practices, local governments, such as Gangwon, are at the forefront of mass timber construction. As a source of both sustainably harvested softwood and expertise in mass timber construction, B.C. is well positioned to capitalize on the growing interest.

Upcoming projects:

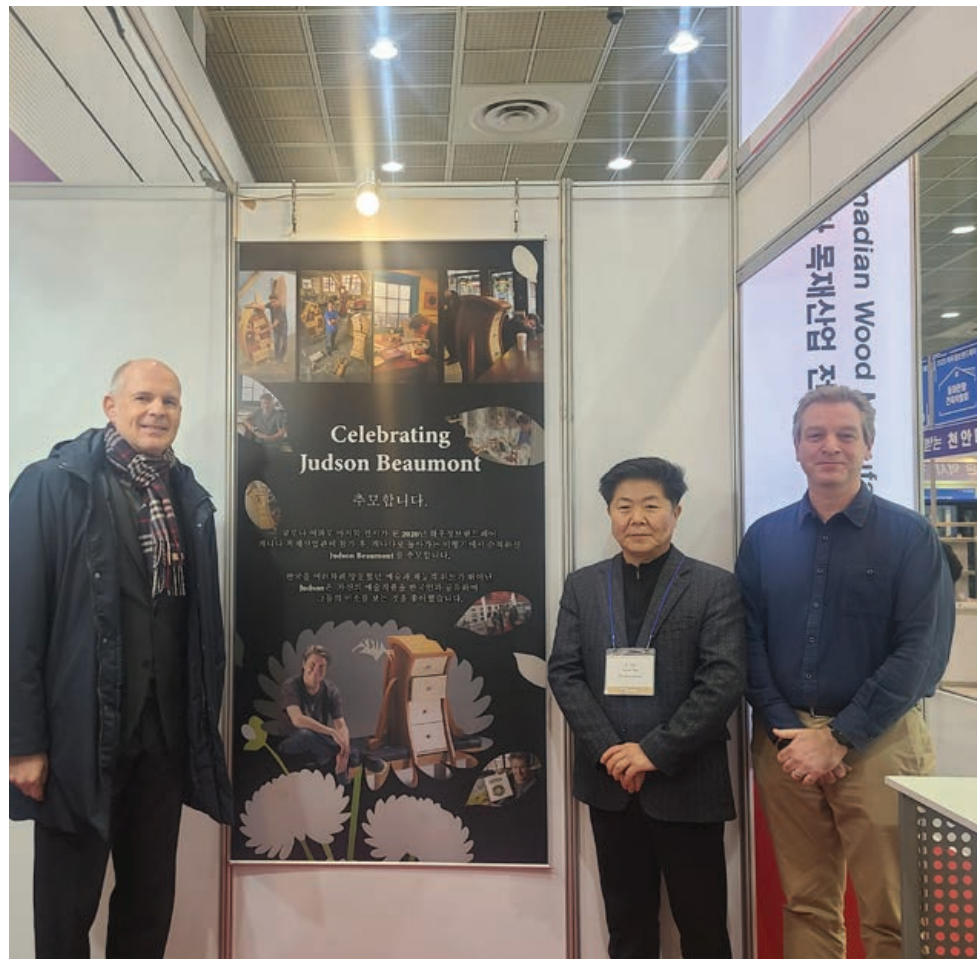
- Daejeon-Yuseong Bus Terminal, a 3,500 m<sup>2</sup> facility built from wood, valued at CAD \$46.5 million, opening this year
- Seoul Metropolitan Library, a 25,000 m<sup>2</sup> hybrid wood building, valued at CAD \$175 million, opening in 2029
- Hyoje-Dong Jongno-gu Social Welfare Building, a six-storey hybrid building, valued at CAD \$19 million, opening this fall
- Haedong Advanced Engineering Building, a 10,000 m<sup>2</sup>, seven-storey mass timber building on the campus of Seoul National University, opened in 2024

While the public sector has taken the early lead in mass timber, private interest is growing rapidly, with an increasing number of large-scale projects either in the planning stages or under construction.



*Hyoje-Dong Jongno-gu Social Welfare Building | Photos: Canada Wood*





## BC Wood promotes value-added sector at Housing Brand Fair

Trade shows are an important part of the market strategy, as they provide direct engagement with potential customers. When coordinated with advertising, social media and other promotional efforts, trade shows are a highly cost-effective means of boosting awareness and generating business leads. For these reasons, trade shows are an important part of BC Wood's program to promote B.C.'s value-added wood products in South Korea.



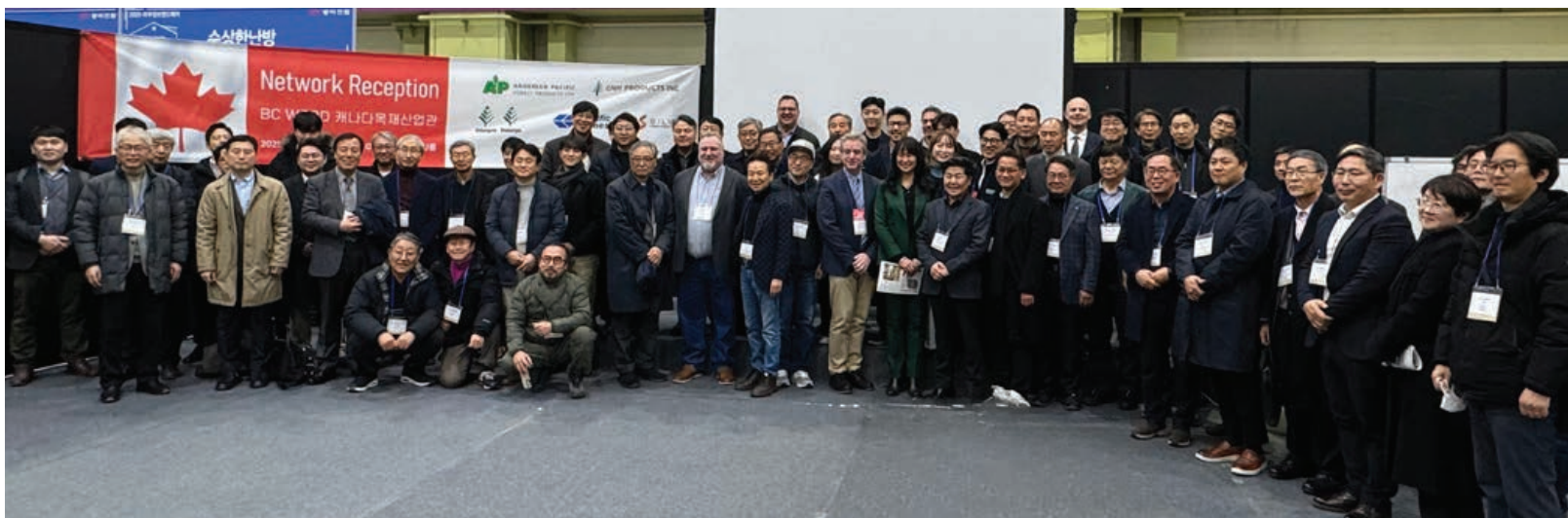
2025 Housing Brand Fair | Photos: BC Wood Specialties Group





At the 2025 Housing Brand Fair trade show in Seoul, BC Wood sponsored a seminar and networking event that attracted a combined 300 architects, engineers, developers and key members of industry associations. The seminar introduced South Korean professionals to B.C. value-added firms and the latest developments in mass timber, large-scale wooden structures, and fireproofing technology. The event was leveraged through social media and linked to the Canadian Timber Industry Pavilion at the trade show for consumer outreach.

The Housing Brand Fair trade show is one of the largest housing shows in South Korea, with more than 50,000 visitors touring 500 booths and displays.



2025 Housing Brand Fair | Photos: BC Wood Specialists Group





# China

As the largest market in Asia by volume for B.C. softwood, China plays an important role in the diversification strategy of B.C.'s forest sector. While export volumes have fluctuated in recent years due to a sharp decline in new home construction and regulatory issues, Canada—mainly wood from B.C.—continues to be China's second largest softwood lumber supplier after Russia. This reflects the effectiveness of the China market development program at building long-term relationships anchored by a strong Canada Wood brand.

Even with tariff disputes now going on with the United States, the Chinese economy is projected to grow faster than other industrialized nations in coming years. A government stimulus program is meant to speed recovery in housing and other construction. And, with aggressive goals to achieve a carbon neutral economy, the country's need for wood products and advanced wood building technology will increase. All of these factors combine to create continuing opportunities in China for B.C. wood products.

Since 2003, FII and the Canada Wood Group have worked together in China to create a market for wood construction and grow the market share for B.C. wood products under the "Canada Wood" brand. From a very small beginning, wood construction is now a viable commercial market. This has allowed the program to shift emphasis from establishing a wood market to promoting higher-value wood products and uses.

*Enshi Pengjiazhai Tujia Autonomous Museum Centre | Photo: Canada Wood*



# Strategy highlights



The primary goals of the China market development strategy remain focused on maintaining and building on the successes in China, a major market for B.C. softwood lumber, while developing higher-value opportunities for B.C. wood products.

Market development efforts are focused on showing how B.C.'s sustainable wood products align with China's carbon reduction and green building priorities. This includes ongoing promotion of the Canada Wood brand, technology transfer, and demonstrating how B.C. softwood can supply emerging sectors, like mass timber. Ongoing research and monitoring ensures the program remains focused on the most viable opportunities. Supply chains are supported through work with regulators to deal with phytosanitary or other shipping issues.

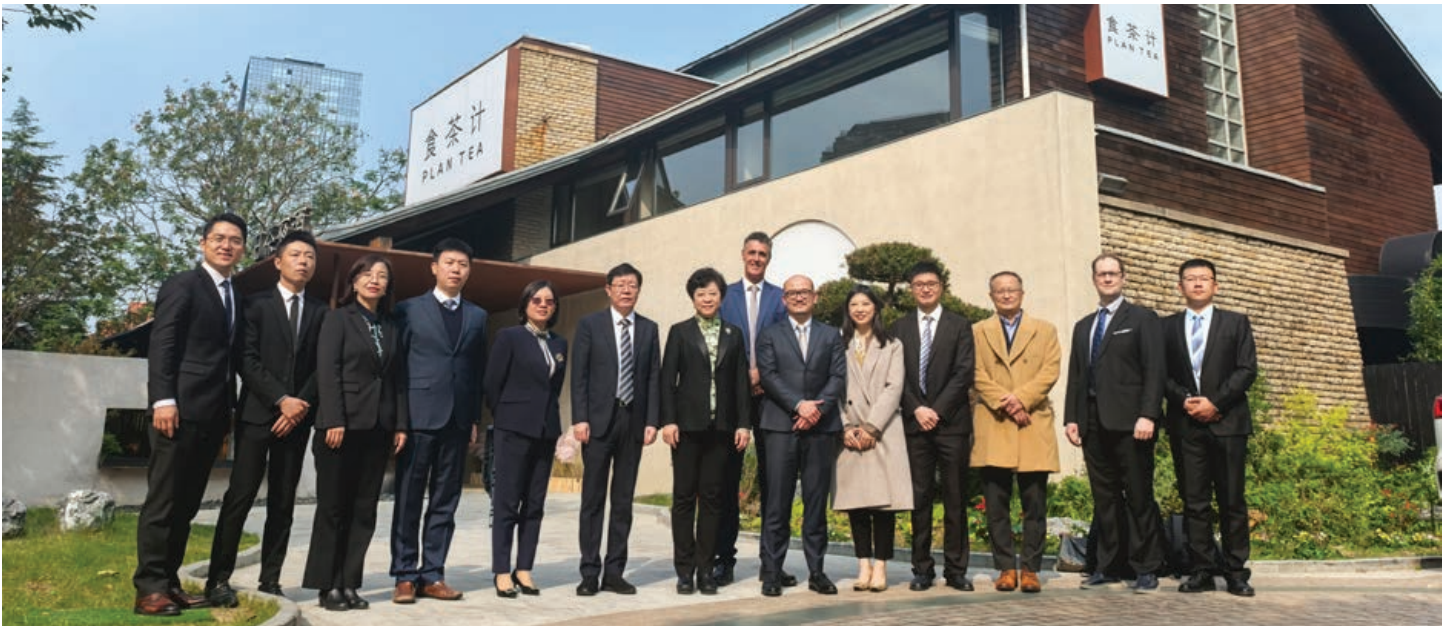
The program also focuses on relationship building with key stakeholders to expand opportunities for higher-value B.C. wood products, with an emphasis on the low-carbon benefits of wood construction. FII China is responsible for educating key government stakeholders on wood's advantages in green building policy, while Canada Wood leads technical efforts and outreach to academic and professional sectors. A collaborative approach is taken with FII China proactively supporting Canada Wood China in industry-focused market development activities.



World Forestry Conference Canadian delegation at B.C. forestry booth | Photo: Canada Wood



# Relationship building pays off with major wins for B.C.



National Center of Technology Innovation for Green and Low-Carbon Building delegation | Photo: Canada Wood

In Chinese culture, the concept of “guanxi”, or relationships built on trust, respect and mutual benefit, strongly influences business and government activities. Because guanxi plays a critical role in shaping business relationships, FII China has used it as the basis for its stakeholder relations program.

Instead of focusing on short-term, transactional relationships, FII and Canada Wood prioritize building long-term partnerships with key stakeholders—such as local developers who influence the use of B.C. wood, and regulatory officials who shape demand through mass timber policies. Often this involves providing Canadian technical expertise that is then adapted for local use. This creates a win-win situation where China gains in terms of more advanced technology or regulation and B.C. wins in terms of more opportunities to sell B.C. wood products.

The signing of three working agreements in 2024 shows the value of this guanxi approach. The agreements—with a developer, a regional research institute, and a national centre for technology innovation—strengthen B.C.’s positioning in the emerging market for mass timber and hybrid construction.

With the Treezo Group, Canada Wood will provide support in the design of a seven-storey mass timber head office for the property developer, and advice on expanding mass timber and prefabrication construction facilities.

Mass timber will also feature prominently in a proposed 10-storey office building in Shanghai. The East China Architectural Design & Research Institute is actively advancing the preliminary preparations for the project. Under the arrangement, Canada Wood will provide technical support on mass timber design and construction. The institute is creating a dedicated wood design department to lead these efforts and establish a wood construction innovation centre focused on advancing mass timber research and adoption.

Promotion of mass timber at the national level is the focus of the third agreement, with the National Center of Technology Innovation for Green and Low-Carbon Building. The agreement supports the institute’s promotion of mass timber as a green building technology through resource sharing, technical exchange and support in developing standards and demonstration projects.

The close working relationships established with these groups provides valuable insight on the demands for wood in China’s mass timber sector, and supports B.C.’s efforts in terms of leveraging the growing demand for sustainably sourced wood in mass timber applications.





Wuxi Wood Construction Office Park | Photo: Canada Wood

## Stakeholder relations build strong bonds in Wuxi

In another example of building guanxi, extensive outreach to local officials, including visits to B.C. to learn more about mass timber technology, is paying off in Wuxi, a wealthy region in eastern China.

Due to the high levels of trust and credibility established by FII and Canada Wood, provincial government officials reached out for training and advice on wood construction. This led to a demonstration project that then gave the local government the confidence to set up a specialized team on wood design and construction.

This has led to the construction of a four-storey, wood office building, 27-unit wood buildings in an industrial/commercial park, a series of mass timber homes, and a mass timber cultural centre and park pavilions.

FII China's relationship with Wuxi officials demonstrates the effectiveness of connecting with representatives at local and regional levels, as they lead local planning and property development.





World Forestry conference opening ceremony | Photo: Canada Wood

## VIP status for Canada at World Forest Industry conference

Canadian officials received VIP status, including sharing the podium at the opening event, at the World Forest Industry conference in Nanning City, co-hosted by the National Forestry and Grassland Administration (NFGA) and the Guangxi Zhuang Autonomous Region Government. Being granted VIP status at the conference signaled a strong endorsement of Canada's contributions and expertise in sustainable forest management. Additionally, it reflects the close working relationship that FII China and Canada Wood have developed with local officials, providing facts and information on responsible forestry in B.C.

The team developed a Canada showcase at the trade show staffed by Canada Wood and industry representatives to promote Canadian mass timber products and showcase demonstration projects.

Throughout the event the delegation was able to connect with national officials on forestry management and conservation, environmental protection, and forest products. This engagement underscored Canada's leadership in sustainable forest management and leading technologies in wood construction in China.



Canada China Business Council award | Photo: Canada Wood

## Awards recognize excellence by Canada Wood

The long-term effectiveness of the market development program in China has been recognized with two prestigious awards by the Canada China Business Council. Canada Wood's Haiyan Zhang received the Gold award for Women in Leadership for her two decades of advancing wood construction codes in China. Canada Wood took the Silver award in the Benefit to Canada category for enhancing collaboration on sustainable building practices.



# Something old, something new



Enshi Xuan'en County Centre Pigeon Flower Bridge | Photo: Canada Wood



Enshi, in central China, is a major cultural region that attracts more than 20 million tourists a year to learn about the Xuan'en people and their historical use of wooden stilt homes, or diaojiaolou.

Wanting to upgrade tourism facilities, officials looked to mass timber as a modern approach to their centuries-old reliance on timber construction. Based on stakeholder relations established through FII China, they connected with Canada Wood for expertise and access to B.C. softwood.

The Xuan'en project includes a large museum, mass timber bridge built from Douglas-fir, and other facilities covering 6,000 square meters. The extensive use of wood goes beyond historical tradition to recognizing the benefits of mass timber in public facilities as a sustainable, green building solution.



Enshi Pengjiazhai Tujia Autonomous Museum Centre | Photo: Canada Wood

Revitalizing tourism and hospitality facilities in rural China is a major part of China's green building program. Canada Wood is using the Xuan'en project as an example to other regions of how mass timber can be used to achieve cultural, green building, and economic development goals.



# Reducing barriers to B.C. wood sales



PWN Barrier CAF Delegation in B.C. learning about Canadian treatment standards | Photo: FII China



PWN Barrier Discussion with NFGA | Photo: FII China

Addressing phytosanitary standards is an important part of the China market development program, as barriers or delays can seriously hinder the competitiveness of B.C. wood products.

A case in point is the issue of pinewood nematode (PWN)—a parasitic worm that causes the disease pine wilt. Citing worries about imported wood carrying PWN that could then infect local forests, China introduced restrictions on softwood lumber imports from Canada and five other nations in 2022. While this did not ban Canadian imports, it added substantial time and cost to the delivery of goods, reducing the competitiveness of B.C. wood products.

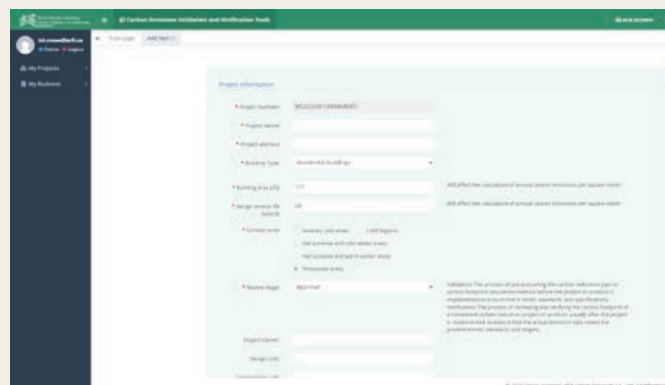
FII China has been involved in ongoing engagement with Chinese officials, to reassure them that Canadian quality control standards—including heat treatment of S-P-F shipped to China—can deal with the PWN.

In 2024 this included a trip to B.C. by Chinese officials to review these approaches. The officials concluded that the Canadian heat treating approach has the potential to set a global standard in treatment and provide the basis for reconsidering import restrictions on Canadian wood products.

These findings bring the issue closer to resolution, a situation that FII China will continue working on until the issue is resolved.

## A calculated benefit for B.C. wood products

Developed with input from Canada Wood, China's first-ever carbon calculator for wood construction was launched this year. The free online tool will help architects, engineers and designers compare the carbon impact of wood versus concrete construction. This will provide critical facts and information about the advantages of using wood in construction and further strengthen and advance sustainable building practices in China. The calculator was developed with the Chinese Academy of Building Science.



# 第九届全国高等学校木结构设计竞赛决赛

THE 9<sup>th</sup> NATIONAL UNIVERSITY TIMBER STRUCTURE DESIGN FINAL COMPETITION

乡村农创种植基地设计  
Design of Rural Agricultural Innovation Cultivation Base

## 一等奖



Design competition gold award winners | Photo: Canada Wood

## Students strive to be a cut above the rest

While wood construction, including mass timber, is now widely accepted in China, the country's ability to design, engineer and build with wood remains restricted by a lack of qualified trades and professionals.

Recognizing that this gap still exists, the market development program continues to invest in programs that encourage more students to learn how to design and build with wood.

The National Timber Design Competition, co-sponsored by Canada Wood, continues to be a high-profile event towards this end. In 2024, more than 200 students and faculty from 15 universities participated in the competition.

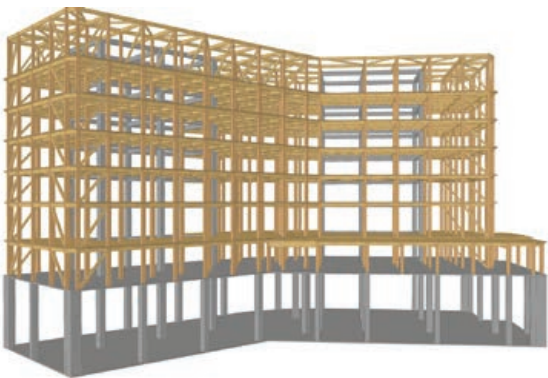
At each competition, teams must come up with a compelling design using wood construction that meets functional, engineering and design criteria. In 2024 the project was to design an agricultural facility including a greenhouse, research and development area, exhibit space and offices.

The winners received extensive praise and exposure in the design, engineering and building professions.

Canada Wood uses the competition as a means of raising the profile of wood construction with engineering and architecture students, particularly those using B.C. wood species.



## Plans announced for tallest-ever wood building in China



*Treezo multi-storey project concept design  
Renderings: Canada Wood*

2024 represented a milestone in wood construction in China with the announcement of plans for the tallest wood building in recent Chinese history.

Treezo Group made the announcement for the seven-storey, mass timber office building, based on an agreement for design and technical support with Canada Wood. Treezo is one of the largest manufacturers of wood panels (oriented strand board, plywood and veneer) in China and hopes to leverage this manufacturing technology to mass timber products. Treezo has also been an innovator in the production of prefabricated wood homes.

The collaboration strengthens Treezo's capabilities in mass timber production and its application in China's growing prefab and mass timber markets, while opening more market opportunities for B.C. wood products in the Chinese construction sector.



# Building capacity for mass timber construction



The Jiangsu Provincial Rehabilitation Hospital, featuring a wood-concrete structure with glulam beams and columns, exemplifies the rapid growth of mass timber construction in the public sector.

China is rapidly embracing wood construction in larger and taller buildings, creating a growing demand for mass timber products. To feed this demand, Canada Wood is partnering with the China Academy of Building Research on a glulam certification program for manufacturers. To date, Douglas-fir glulam products have already been certified for four firms, giving B.C. softwood a significant edge in sourcing this growing market.

In a related development, Canada Wood China and FPInnovations are working closely with Chinese officials to ensure Canadian lumber is recognized in new mass timber product and design standards. This includes advocating for the acceptance of B.C. species like S-P-F, Douglas-fir, and hem-fir in cross-laminated timber manufacturing, and aligning standards with North American practices.

*Jiangsu Provincial Rehabilitation Hospital | Photos: Canada Wood*





# India

As one of the world's most dynamic emerging markets, India presents a significant and exciting opportunity for B.C. lumber companies to expand their reach and establish a stronger foothold in South Asia.

With its rapidly growing economy, expanding middle class, and increasing manufacturing sector, India's demand for softwood lumber is rising sharply—outpacing the capacity of its domestic supply. Certified, sustainably sourced wood, as from B.C., will make up an increasing share of these imports due to evolving consumer demand and increasing global exports from India.

Recognizing the long-term potential of India, FII launched a market development program in the country in 2014 (FII India). FII India has successfully established a strong foundation in the Indian market with the Canadian Wood brand. Now, it is focused on broadening awareness and engagement in the Indian wood manufacturing industry, the sector with the greatest demand for softwood lumber.

*Monkey Bar | Photo: FII India*



# Strategy highlights

To advance the strategic objective of establishing a commercially sustainable market for B.C. softwood species in India, FII's market development efforts are focused on increasing brand visibility and building strong recognition of Canadian coastal species among wood product manufacturers. By positioning B.C. wood as a premium, reliable, and sustainable material, the strategy aims to cultivate long-term demand and support the integration of these species into India's evolving manufacturing and design sectors. Through targeted outreach, promotion, education, and demonstration projects, the intent is to grow sales volume and broaden use of B.C. wood products within the manufacturing sector.

To support long-term growth, the strategy is also strengthening supply chains. FII India is working with wholesalers and importers to build a supply and distribution network to stock B.C. species. The program connects B.C. firms with potential Indian customers, and facilitates market development through market intelligence and in-market technical support.



Indore Nagar Parishad Assembly Hall | Photo: FII India



# Expanding awareness and building the Canadian Wood brand

With B.C. wood marketed under the Canadian brand in other Asian markets, leveraging this profile helped FII India quickly establish a brand presence in India. Today, Canadian Wood is widely recognized in the manufacturing sector, and increasingly with targeted specifiers and end users.

Continuing to build brand profile is embedded as a fundamental element of the market development strategy. A strong brand helps differentiate B.C. wood from competitors, builds trust and credibility, and simplifies promotional efforts. The branding program is delivered through trade shows, promotion, outreach, a social media strategy and educational programs.

## Local firms partner with FII at major trade show

Eight Indian furniture manufacturers recently worked with FII India to create a high-end home display at the IndexPlus 2024 trade show. Each of the manufacturers trialed wood products from B.C. before the tradeshow and showcased their furniture designs alongside FII India. The Canadian Wood showcase at IndexPlus reflected the growing awareness within India's manufacturing sector of B.C. species as a premium choice for furniture and interior products. The manufacturers made a number of sales directly attributed to the exhibit, including a distribution agreement for furniture with a UK brand.

IndexPlus is India's largest home furnishings and design trade show, with 350 exhibitors from more than 10 countries, and over 10,000 visitors. To supplement the impact of the exhibit, FII India was invited to participate in a panel discussion on sustainably sourced furniture that referenced B.C. species and Canada's international reputation for sustainable forest management practices.



Trade show booth at IndexPlus | Photos: FII India



"Wood is Good" design competition | Photos: FII India

To build interest and capacity in wood design with the next generation of engineers and architects, FII India sponsors the annual "Wood is Good" competition. Held on Earth Day to reflect the sustainable basis of wood use, the event is one of the most highly anticipated on the academic calendar.

The latest competition had students from eight colleges competing to design furniture, including chairs and storage lockers, using western hemlock. Submissions were judged on design and practicality by a panel of experts.

The outreach program to colleges also includes targeted local design competitions to give students first-hand experience working with B.C. species. At the National Institute of Design, the program provided training workshops for 30 students to create interior furniture and décor items from western hemlock.

By learning about B.C. species while in school, the expectation is that this experience will translate into greater demand for B.C. species as students graduate into their professional careers.

**College  
competition  
shows that  
wood is good**



## Professional seminars target industry leaders

The sourcing of legally harvested, certified wood products is of growing importance to the Indian manufacturing sector. To reach this audience, FII India conducted a series of 12 seminars targeting India's manufacturing heartland. Each seminar outlined Canada's sustainable (and third-party certified) forest practices and the product benefits of B.C. species. The 450 manufacturers, engineers and architects attending the seminars showed a very high level of interest.



Educational seminars | Photos: FII India



# Promotional campaigns boost profile of Canadian Wood brand



FII India bolsters the direct contact of trade fairs, educational programs, and product trials with an extensive promotional campaign. The campaign uses a cost-effective mix of advertising, public relations and social media.

## 3.2

million impressions

## 23,468

Facebook followers

## 1,321

LinkedIn followers

## 1,060

YouTube followers

## 347

Instagram followers



# Product trials broaden appeal of B.C. species

By engaging directly with manufacturers, a product trial provides a hands-on experience that builds on the recognition and awareness created through outreach activities. This helps create competitive advantage and a stronger connection with local manufacturing firms. As a result, product trials are a foundational and cost-effective part of the India market development program.

**46**  
product  
trials  
completed  
in 2024/25

## Sumitra Woodcraft

Focused on supplying major international retail chains with quality interior furniture, Sumitra Woodcraft wanted to expand its supply of certified wood. However, the company's large production volume meant they needed to confirm both quality and supply before selecting a supplying partner. FII India seized this opportunity by providing the firm with wood supplies for product trials, as well as technical support, education seminars, and frequent meetings.

This attention to detail paid off, as Sumitra transitioned to western hemlock for a major line of furniture. It is now undertaking further trials of other B.C. species, including Douglas-fir, western red cedar and yellow cedar, recognizing the unique product attributes of each species.



Sumitra Woodcraft products featured in the Canadian Wood tradeshow booth | Photos: FII India

## Venture Furniture

A manufacturer of outdoor furniture, the firm was looking for alternatives to teak wood, a species of increasing cost and reduced availability. Venture connected with FII India through the IndexPlus trade show, and based on advice from the FII team, conducted a product trial using western red cedar. The results were favourable and Venture is now using B.C. cedar in their production line.



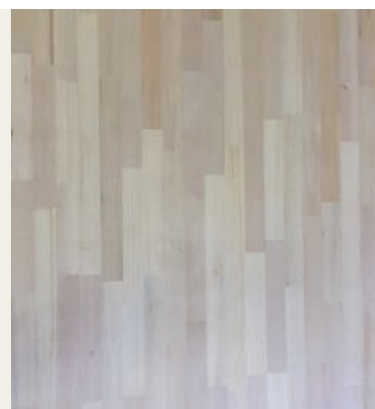
Venture Furniture | Photo: FII India



Rajdhani Crafts |  
Photo: FII India

## Rajdhani Crafts

A major exporter of furniture to high-end retailers in Europe and North America, Rajdhani Crafts was looking to diversify its supply of certified wood. Through FII India's market development program—including visits to the trade show booth and attending webinars—the firm learned about sustainable coastal species from B.C., and their potential for use in furniture manufacturing. A product trial using western hemlock for chair manufacturing followed, supported with technical advice, workshops, and quality assurance from the FII team. The results were favourable and the firm is now using western hemlock in a new product line tailored to their export buyers.



Western hemlock FJEG boards | Photos: FII India

## Hindustan Sawmill

Manufactured wood panels are used extensively in furniture production; supplying feedstock to this process opens up new opportunities for sales. Towards this end, a product trial was organized with Hindustan Sawmill using western hemlock for finger joint and edge glued boards (FJEG), a common type of panel in India. The firm was looking for a species that could replace the hardwoods typically used in manufacturing, but of diminishing availability.

FII India connected the firm with Naman In-Store—a furniture maker supplying retailers with cabinetry, furniture and finishings. FII facilitated the product trial, including technical support and assistance with PEFC certification.

The product trial manufactured cabinets and display stands for the retail stores of a major luxury brand in the United Kingdom. The client was highly satisfied, leading to Naman placing a major commercial order of western hemlock FJEG boards from Hindustan. Demand has since doubled, with the firm predicting a potential tripling of demand over the next 18 months.

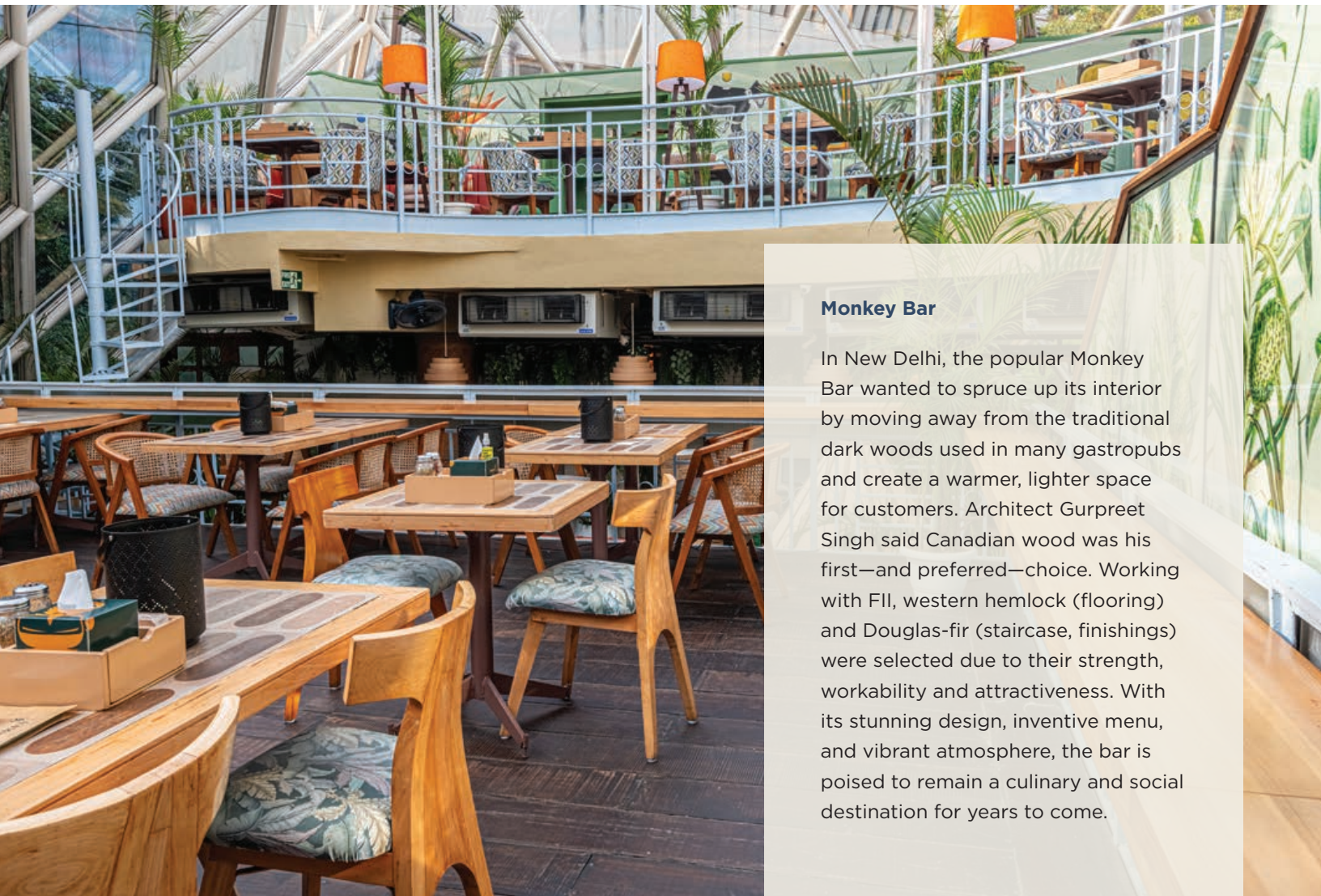
Based on this success, FII India is now positioning “hemlock FJEG board” as a new product for commercialization by panel manufacturers.



# Commercial projects promote wood use in hospitality sector

Interior design is an important marketing differentiator in the highly competitive hospitality sector, as a well-designed interior creates a positive first impression and sets the tone for the customer experience.

FII India is using the natural appeal of B.C. wood products and finishings through a series of commercial projects to help firms create competitive advantage in the crowded hospitality marketplace. Commercial projects serve as powerful proof points for the advantages of B.C. wood—demonstrating how species like western hemlock and Douglas-fir perform in high-profile, design-forward applications such as hospitality and interior spaces. The projects also provide important market insights to better understand customers needs, preferences and challenges. Additionally, visually appealing interiors and furnishings are often shared on social media, attracting new customers through word-of-mouth and online visibility, and further enhancing the Canadian Wood brand. FII provides technical advice and support; the costs of these projects are borne by the commercial interests developing them.



## Monkey Bar

In New Delhi, the popular Monkey Bar wanted to spruce up its interior by moving away from the traditional dark woods used in many gastropubs and create a warmer, lighter space for customers. Architect Gurpreet Singh said Canadian wood was his first—and preferred—choice. Working with FII, western hemlock (flooring) and Douglas-fir (staircase, finishings) were selected due to their strength, workability and attractiveness. With its stunning design, inventive menu, and vibrant atmosphere, the bar is poised to remain a culinary and social destination for years to come.

Monkey Bar | Photo: FII India





Town Country Espresso | Photos: Fill India



### Espresso bar “buzz” for cedar

Just like in B.C., coffee houses are popular venues in India for casual meetings, remote work, and connecting with friends. But to be the “go to” spot in a neighbourhood, a coffee house must find the ideal combination of great coffee, reliable service, and a welcoming atmosphere.

In Jaipur City, Town Country Espresso has found this sweet spot in part by using B.C. species for its interior design. Looking for a sustainably sourced wood that would brighten up the interior of its third location, the designer chose yellow cedar for furniture, panelling, doors, and window panes.

Consumer response has been overwhelmingly positive, with the firm planning to use yellow cedar in all of its future outlets.





Indore Nagar Parishad Assembly Hall | Photo: FII India

## New government building features western hemlock

Extensive use of western hemlock has allowed the Indore local government to build a new assembly hall that is functional, visually impressive and environmentally progressive.

Based on a relationship with FII India established through trade events and seminars, local officials called on the expertise of the FII team for design and technical support. FII worked with officials to find the right fit for this project. Ultimately, the design team chose western hemlock and facilitated supply through local distributors.

The assembly hall is used on a regular basis by state officials, party leaders, and members of the Legislative Assembly for government meetings, events and elections. It is already receiving a great deal of attention—and perhaps a bit of envy—from other local government officials.





Jackhammer glulam manufacturing facility | Photos: FII India

## New capacity opens India to mass timber

While interest in mass timber is growing in India, limited local manufacturing capacity has so far constrained its adoption in construction. However, this is set to change with the upcoming launch of India's first glue-laminated timber (GLT) factory—marking a significant step forward in enabling large-scale use of mass timber in the country.

Jackhammer India's new facility will manufacture GLT beams of up to 18 metres in length to international standards using B.C. Douglas-fir and Indian species.

Architects and engineers in India are well aware of the environmental benefits of mass timber construction, in part due to seminars and educational programs sponsored by FII India. This has led to interest for mass timber use, particularly in the hospitality and tourism sectors. However, up to this point, a lack of supply has limited the design and building of larger facilities, such as lodges or assembly halls.



# Vietnam

A number of converging factors make Vietnam an optimal market to grow B.C. lumber sales and further diversify exports. From a small industry supplying domestic needs, Vietnamese furniture manufacturing has grown into an export-focused juggernaut with around 4,000 factories exporting to more than 120 countries around the world. The country ranks as the second largest furniture exporter in Asia, after China, with furniture and wood product exports topping USD \$16 billion in 2024.

Due to this growth, Vietnam is increasingly drawing on foreign suppliers to meet its wood needs. And as hardwood supplies have dwindled, imports have trended towards softwood. The Vietnamese government and consumers both understand the importance of certified wood products, recognizing its role in global sustainability. This has led to even greater interest by Vietnamese furniture makers in certified softwoods.

As one of the world's largest suppliers of certified softwood lumber, B.C. is well-positioned to align with Vietnam's growing demand for sustainable wood products—creating a strong mutual opportunity for market development.

In 2022, FII opened an office in Vietnam to conduct market research and outreach, with a long-term objective of creating a commercial market for B.C. wood products. Communications and education are conducted under the “Canadian Wood” brand.



*Canadian wood showroom | Photo: FII Vietnam*

# Strategy highlights

With an end goal of creating a commercial market for B.C. wood products, the current strategic focus of the Vietnam market development program is in three areas. First, to grow the Canadian Wood brand as a preferred supplier of sustainable, certified softwood lumber products. Second, to boost demand for softwood lumber by promoting it as an alternative to hardwood for furniture manufacturing. Third, to showcase B.C. species and suppliers, with a focus on underutilized coastal species, as the premium softwood alternative to hardwood.



## Industry trade mission strengthens ties with furniture manufacturers in Vietnam

Trade missions are a powerful market development tool, as they provide direct access to key stakeholders in the target market. This face-to-face engagement builds trust, reinforces B.C.'s commitment to the market, and facilitates discussions about mutual interests and opportunities.

An industry trade mission in the spring of 2024 marked a milestone in market development efforts, as it was the first entry into Vietnam for many senior industry officials. Led by the former B.C. Deputy Minister of Forests, Rick Manwaring (also former FII Board Chair), the mission allowed industry leaders to see first-hand the tremendous opportunities in the Vietnam market.

The program focused on furniture manufacturing in southern Vietnam—the centre of the industry—including a visit to a 74-acre facility employing 5,000 people. This factory exports significant volumes of finished furniture products. Several site visits focused on the success FII Vietnam has achieved in promoting product trials of coastal species, including western hemlock and other softwoods for furniture making.

Vietnamese manufacturers expressed strong interest in using B.C. wood in their furniture production, highlighting the growing role of sustainably sourced, high-quality softwood lumber in their operations and reinforcing Vietnam's potential as a key commercial market for British Columbia.



Industry trade mission | Photos: FII Vietnam



# Product trials drive market acceptance and growth

In 2024/25, product trials remained a key driver of FII Vietnam's market development, with 24 recorded trials helping manufacturers explore B.C. softwood species for furniture applications. Product trials help to test and validate the performance of B.C. wood, leading to faster industry acceptance. And by connecting directly with manufacturers, the trials provide constructive feedback for the overall marketing program.

Each trial is strategically planned, focusing on manufacturers with the capability and market potential to integrate Canadian wood into production sooner rather than later.

To build on this momentum, FII Vietnam has implemented a plan to identify and map out 700 potential manufacturers, progressively engaging with them over the next three years. This approach strengthens market intelligence—allowing the team to target the right partners at the right time and ensuring that every interaction moves the industry closer to adopting B.C. softwood species.

Product trials are an important and strategic market development approach; education for manufacturers to better understand B.C. species and other technical guidance are key to initiating the right trial and proposal. Post-trial communication is critical in supporting manufacturers based on their business needs and eventually moving towards full-scale commercialization. Recognizing this, FII Vietnam goes beyond just initiating trials to actively supporting manufacturers through each stage, offering technical guidance, helping them refine their processes, and facilitating connections to buyers who value high-quality, responsibly sourced wood.

Over the past year, FII Vietnam focused more on existing adopters. This was because their favourable experiences with B.C. wood enabled quicker approvals for expanding their use to other B.C. species and applications.



Educational workshop and product trial | Photo: FII Vietnam



Under the “Try Canadian Wood” program, a large manufacturer with exports topping USD \$100 million per year recently tested the use of Douglas-fir in bedroom and dining sets. Results were favourable and the firm is now looking to expand use to western hemlock and S-P-F, all from B.C.



Falcon Inc. product trial | Photos: FII Vietnam

In another success for coastal species, Falcon Inc., a furniture manufacturer servicing the hospitality sector, product tested western hemlock for furniture. Testing was rigorous as the company services clients in the tropics (Singapore), coastal regions (Japan) and across North America (arid and sub-zero conditions). Tests were successful and western hemlock is now considered a viable species as an alternative to oak, walnut and other premium hardwoods. The company is now preparing to incorporate the B.C. species in larger scale production.



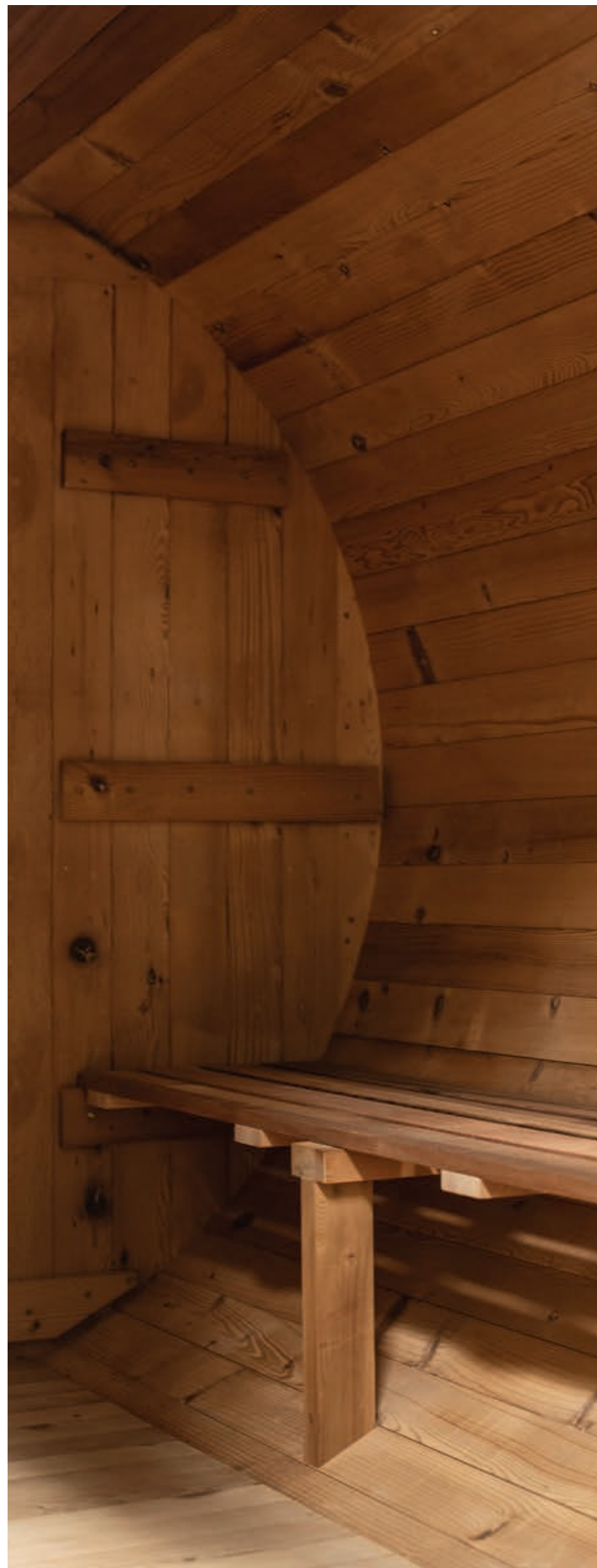


## Hemlock heats up sauna production

With a line of sauna and outdoor furniture products already using western red cedar, manufacturer Giang Minh understood the many benefits of using B.C. coastal species. So, when the firm wanted to expand its line of saunas, it asked for advice from FII Vietnam. The team introduced the manufacturer to thermally modified hemlock, a product that undergoes additional heat treatment to increase durability and resistance to moisture and decay. A product trial followed, with favourable results.

FII then connected Giang Minh with a North American importer, who placed an order for the new saunas. The high-end product quickly sold out, with Giang Minh now scaling up production to meet the increasing demand.

Giang Minh is so impressed with thermally modified hemlock that it is looking to use the wood in a wider range of product lines targeting markets in the UK, Australia, and North America.



*Thermally modified western hemlock sauna manufactured by Giang Minh Co., Ltd. | Photos: FII Vietnam*

# Market leadership through training

FII Vietnam is strategically building the market presence of B.C. wood products through a multi-faceted approach encompassing education, partnerships, and industry engagement. Targeted training and technical expertise positions FII as a key resource for manufacturers transitioning to and utilizing B.C. softwood. These educational initiatives, coupled with collaborations and active participation in industry events, are driving demand for B.C. wood products, promoting sustainable forestry practices, and establishing Canadian Wood as a leader in the Vietnamese market.



## Best practices? B.C. wood

As more furniture manufacturers look to B.C. softwood species as an alternative to hardwood, so does the demand for technical advice. To bridge knowledge gaps, FII Vietnam held “Best Practices—Adapting New Wood Species in Your Production,” a seminar for manufacturers, experts, and industry leaders to explore the unique properties and benefits of sustainable wood from B.C.

Through detailed sessions led by FII Vietnam’s technical team, the seminar reviewed manufacturing issues, like warping, moisture content, mechanical failures, machinery adjustments, wood movement, and coating techniques. The seminar also covered U.S. safety standards, cost-efficiency and improving production processes.

After attending the seminar, many companies registered for the “Try Canadian Wood” product trial program.



Best Practices—Adapting New Wood Species in Your Production seminar | Photos: FII Vietnam



## A grade above

To continue the success of the “Grading insights” program, FII Vietnam held a follow-up seminar on enhancing profitability through grading expertise. The in-depth presentations covered grading rules, sustainability, and cost analysis. Hands-on sessions and wood displays allowed attendees to interact directly with Canadian wood, reinforcing its quality and versatility.

The seminar attracted key players in the furniture industry, generating valuable connections and fostering engagement through Q&A sessions. The seminar was leveraged through social media to maximize reach and participation. Follow-up feedback will be used to design future versions of the event.



Grading insights seminar | Photos: FII Vietnam



Educational seminar at Ho Chi Minh City University | Photos: FII Vietnam

## Students introduced to sustainable B.C. species

Engineering students in furniture and wood technology in Vietnam are being taught about B.C.'s sustainable forest practices and given hands-on experience with coastal species, through a collaboration between FII Vietnam and Ho Chi Minh City University of Technology and Education.

Associate Professor Chau Dinh Thanh, a vice president of the university, said he was honoured to collaborate with FII and sees the initiative as empowering students with in-depth knowledge of sustainable forestry and wood practices.

# Trade shows connect Vietnamese buyers with B.C.



Canadian Wood booth at Vietnam trade shows | Photos: FII Vietnam

While social media and promotional campaigns have great reach, trade shows are highly effective at building relationships with prospective customers. They do so by showing the application of B.C. species to industry needs, providing immediate feedback, and generating qualified leads for follow-up discussions. Participating in major trade shows also boosts visibility and enhances brand recognition, as the events tend to attract industry leaders, news media, and other influencers.

FII Vietnam targets two major trade shows as part of its overall market development program. At the Vietnam International Furniture and Home Accessories Fair (VIFA 2025), FII Vietnam introduced a new display combining messaging on B.C.'s sustainable forests and B.C.'s unique mix of softwood species. The booth featured locally manufactured furniture from coastal hemlock and other B.C. species and a "colour wall" that showcased the exceptional finishing capabilities of western hemlock and Douglas-fir (a major factor in selecting a species for furniture making). The combination of a "hands on" samples and strong messaging proved effective—VIFA

2025 generated 43 qualified leads, a large response given Vietnam is still a pre-commercial market for B.C. wood.

Solid results were also achieved at the Ho Chi Minh Export Furniture Fair (HAWA 2025). As a trade show focused on furniture exports, the FII booth emphasized the diversity of B.C. species for the manufacturing sector. Furniture designed by four prominent local manufacturers crafted from western hemlock and Douglas-fir was featured, along with samples of B.C. coastal species. The manufacturers trialed the wood products leading up to the show and made the furniture based on their own designs. Working with the FII Vietnam team at the show allowed for more collaboration onsite in terms of educating about the making of these products. This approach proved a winning combination, as HAWA 2025 generated 35 qualified leads.

FII staff are now engaging with the contacts generated at the two trade shows for product trials and further collaboration.



# Industry resources

Forestry Innovation Investment 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](https://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 \$228,000 in savings in 2024/25.

Learn more at [imagelibrary.bcfii.ca](https://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](mailto: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](https://naturallywood.com)**



B.C. lumber stacks | Photo: Nik West

## B.C. Wood Supplier Directory

The B.C. Wood Supplier Directory connects buyers with over 350 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 [naturallywood.com/suppliers/](https://naturallywood.com/suppliers/)**



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 3,000 research resources, with links to download reports and information.

**Visit [research.thinkwood.com](https://research.thinkwood.com)**



bcfii.ca



naturallywood.com



Corporate office  
1200 - 1130 West Pender Street  
Vancouver, B.C. Canada V6E 4A4  
T 604 685 7507 | F 604 685 5373  
[info@bcfii.ca](mailto:info@bcfii.ca) | [www.bcfii.ca](http://www.bcfii.ca)



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