2023 - 2025

Strategic Marketing Plan 2023

APA

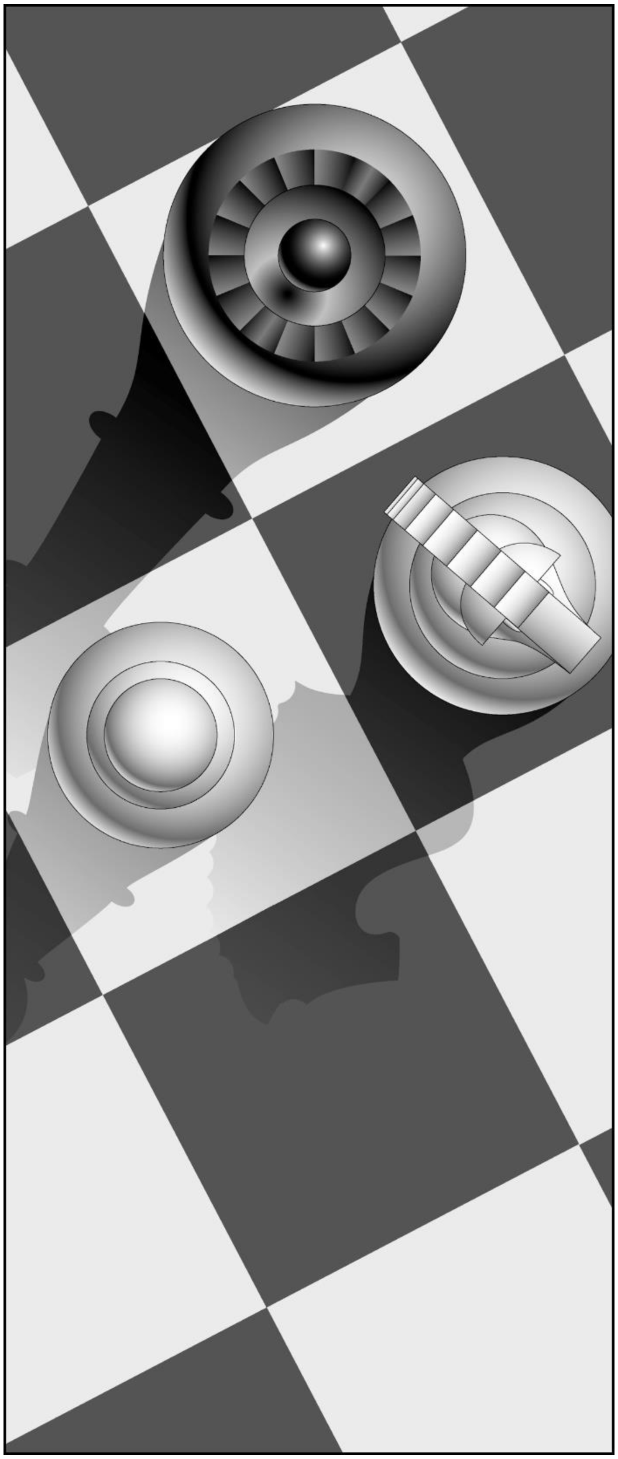


TABLE OF CONTENTS

October 2022

RESIDENTIAL MARKET

2023 MARKET OBJECTIVES

I. WALL SYSTEMS
Maintain wood structural panel share of wall sheathing in residential construction

II. ENGINEERED FLOOR SYSTEMS
Support the growth of engineered wood floor systems

III. ENGINEERED WOOD PRODUCTS INSTALLATION EDUCATION
Reduce callbacks and claims due to improper specification and application of member products

IV. RESEARCH
Understand opportunities and threats to member products

RESIDENTIAL MARKET – SUMMARY OF BUDGET AND STAFF TIME

2023 RESIDENTIAL PLAN SUMMARY			
Residential Market Objective	Residential Budget	Budget Percentage	Staff Time (%)
I. Wall Systems	$ 75,000	55%	65%
II. Engineered Wood Floors	$ 20,000	15%	6%
III. Installation Education	$ 12,500	9%	27%
IV. Research	$ 29,000	21%	2%
Total	$ 136,500	100%	100%

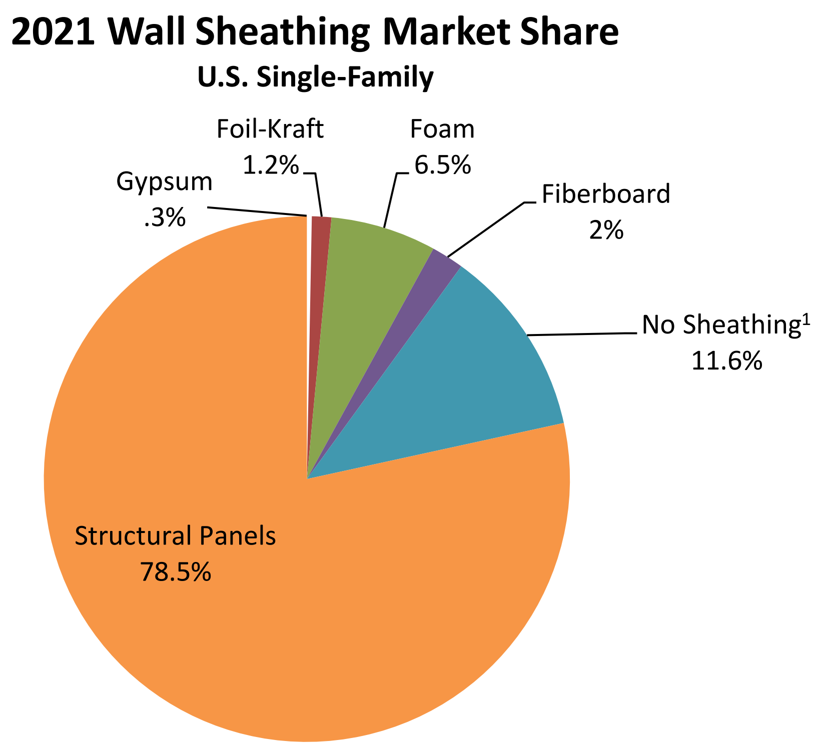
Market Objective I – WALL SYSTEMS

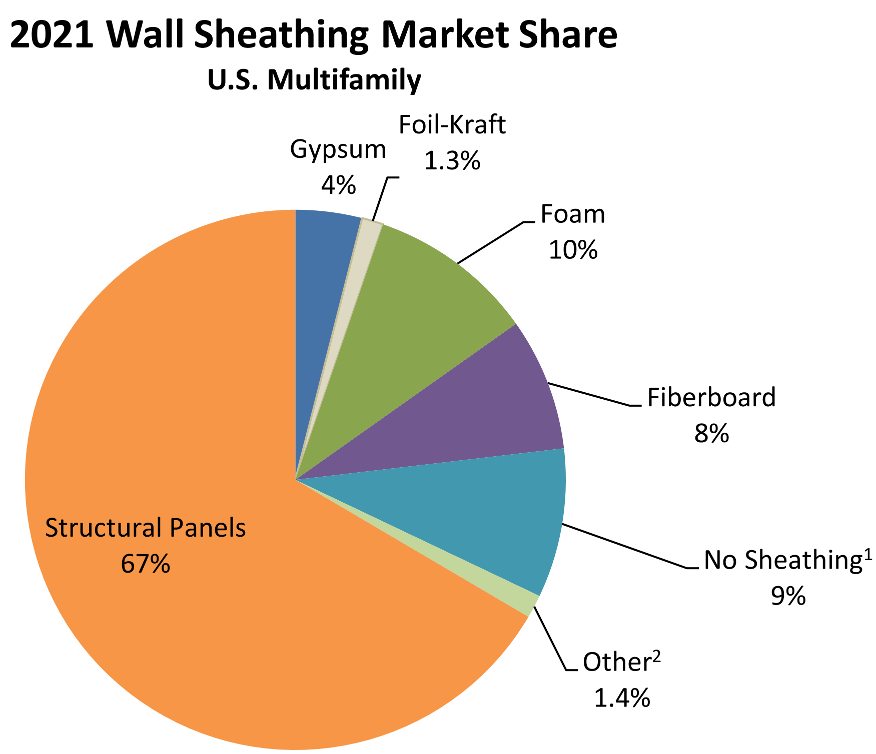
Maintain wood structural panel share of wall sheathing in single-family residential construction.

Market Description: Due in part to the aggressive and effective promotion of the many benefits of wood structural panels, the industry's wall sheathing market share grew from 50% in 1995 to between 65-70% in the 2000s. Since 2010 residential wall sheathing market share has consistently been in the low 80 percent range. The most recent data is for 2021. It showed a small dip in share to 78.5% as a result of the extended economic challenges following the pandemic. (Data are from the Home Innovations Research Labs/NAHB Research Center annual builder surveys.)

Market size: **Wall Sheathing – U.S.**

	Est. 2022 Potential	Current Volume	Est. Share	Left To Gain	Forecast Volumes (in million sq. ft.) 2023	2024	Market Share 2024
Structural Wood Panels							
Single-family (Mn sq ft)	4,416	3,495	78%	921	3,648	2,897	80%
Multifamily (Mn sq ft)	595	472	79%	123	248	438	81%
Total (Mn sq ft)	5,011	3,967	79%	1,044	3,896	3,335	80%





[1] "No Sheathing" includes structural insulated panels, stucco walls without sheathing, siding direct to studs and concrete walls.
[2] "Other" indicates that survey respondent didn't recognize the terminology used in the survey. They simply indicated "other".

Market Objective I – WALL SYSTEMS

Maintain wood structural panel share of wall sheathing in single-family residential construction.

Strategic Imperatives

- Builders, designers, and code officials must clearly understand the many structural and performance benefits of continuous wood structural panel wall sheathing.
- Energy designers must understand that there are energy *and* structural code requirements which are best met by using wood structural panel wall sheathing.
- Builders, designers, and code officials must understand the wall bracing requirements of the code.
- Builders, designers, and regulators must recognize the nail base benefits of wood sheathing – for the direct attachment of siding, trim, utility connections, continuous insulation, water resistive barriers, etc.
- Additional benefits of fully sheathed walls must be developed and promoted to further build the value proposition for wood sheathed walls.
- Building envelope moisture research must continue to support the use of properly designed structural panel exterior wall assemblies.
- APA must develop moisture-resilient recommendations for the combined use of wood structural panel and foam sheathed wall systems.
- Net zero energy home program requirements must provide options for use of wood structural panel wall sheathing.
- States must adopt energy codes that do not mandate exterior continuous insulation, at the expense of wood structural panels.
- Builders must determine that fully sheathed wood walls offer better value than walls sheathed with competitive products.

Market Objective I – WALL SYSTEMS

Maintain wood structural panel (WSP) share of wall sheathing in single-family residential construction.

		Division Allocation*					
Strategies/Tactics		FS	MC	TS	MR	QS	Budget
A	Promote the performance benefits of continuously sheathed WSP walls to building professionals	X	X				
	1 Drive builders and designers to the APA website through online advertising		X				$32,500
	2 Feature the benefits of wood walls through publicity in the trade and social media.	X	X				
	3 Develop key relationships with builders through memberships in local home builder associations	X					$10,000
	4 Highlight performance benefits of WSP walls by exhibiting at Texas trade shows, such as Sunbelt Builders Show, SEAOT and Building Perfornace Institutes.	X	X				$10,000
B	Promote the building code advantages of wood walls.						
	1 Update the APA wall bracing calculator.	X	X	X			$1,500
	2 Continue to demonstrate the need for prescriptive wall bracing in Canada through builder and code education.	X					
	3 Update the APA Force Transfer Around Openings calculator.	X	X	X			
	4 Understand fastener types used and their installed costs for common sidings and foam sheathing. Use results to inform APA promotion nail base sheathing benefits.	X					
C	Monitor emerging wall sheathing products and wall assemblies						
	1 Research and understand the threat of magnesium oxide structural panels.	X		X			$5,000
	2 Promote independent test reports and storm damage assessments demonstrating the performance of WSP and flexible wall sheathing products.	X	X				
D	Partner with AWC to support development of new IECC versions that provide flexibility for the use wood products, including wall sheathing.	X					
E	Ensure fair treatment of wood wall sheathing during state adoptions of the IECC (no continuous insulation mandates).	X					

Market Objective I – WALL SYSTEMS

Maintain wood structural panel (WSP) share of wall sheathing in single-family residential construction. (continued)

F	Promote energy efficient wall assemblies that meet increasingly stringent energy codes.						
	1 Participate in the RESNET Supplier Advisory Board, standards development, and educational events.	X					$11,000
	2 Promote high R-value wall assemblies as options for Net Zero Energy homes.	X	X	X			$5,000
G	Monitor industry development of robust wall assembly recommendations that minimize moisture risk in walls when wood sheathing and continuous insulated sheathing (2-layers) are used.			X			
	Total						**$75,000**

***FS = Field Services**

MC = Marketing Communications

TS = Technical Services

MR = Market Research

QS = Quality Services

Market Objective II – ENGINEERED FLOOR SYSTEMS

Support the continued growth of engineered wood floor systems

Market Description: I-joists, LVL, glulam, structural composite lumber and structural wood panels, rimboard in single-family and multifamily residential floor construction.

Strategic Imperatives:

- Builders, specifiers, and building material retailers must be educated on the benefits of engineered wood products used in floor systems
- Builders, code officials, specifiers, and fire professionals must understand the fire protective membrane requirements for engineered floor systems as required by the International Residential Code.
- APA must coordinate with AWC's industry efforts and members of the APA Fire Education Task Group in order to mitigate concerns about the fire performance of wood buildings.

		Division Allocation*					
	Strategies/Tactics	**FS**	**MC**	**TS**	**MR**	**QS**	**Budget**
A	Support I-joist, SCL and Rim Board producing members through market access activities.		X	X			
B	Coordinate through the APA Fire Task Group to educate key audiences on code-compliant options for protecting I-joist floor systems.	X	X	X			$20,000
C	Participate in industry efforts to mitigate concerns about wood product performance in fires.	X	X				
D	Promote the benefits of glulam, SCL and I-joist floor systems through APA tools and education.	X	X	X			
E	Monitor the impact of energy code adoptions on local I-joist markets, vis-à-vis plated wood floor trusses.	X					
	Total						**$20,000**

***FS = Field Services**

MC = Marketing Communications

TS = Technical Services

MR = Market Research

QS = Quality Services

Market Objective III – ENGINEERED WOOD PRODUCTS INSTALLATION EDUCATION

Reduce callbacks and claims due to improper specification and application of member products.

Market Description: Construction markets in the U.S. and Canada consume the vast majority of engineered wood products, including over 80 percent of structural panel production. These markets are affected by poor construction practices that can lead to dissatisfied end users and opportunities for competitive product entry.

Strategic Imperatives:

- Builders, specifiers, and building material retailers must be educated on how to properly select, specify, and install engineered wood products.
- Builders, specifiers, and code officials must be educated on building envelope systems installation so as to promote the lasting integrity of the building envelope.
- Builders must trust that properly installed engineered wood products offer excellent performance.
- Building codes and standards must recognize the suitability of APA member products in construction applications.
- Construction industry media, builder associations and construction industry influencers must look to APA for product installation guidance to share with their audiences, members and followers.

		Division Allocation*					
Strategies/Tactics		**FS**	**MC**	**TS**	**MR**	**QS**	**Budget**
A	Promote proper installation of member products to builders and design professionals.	X	X				$12,500
B	Implement a new construction observation program designed to improve the installation practices of production builders and to discover opportunities for increased use of member products.	X					
	1 Develop marketing flyer and program checklists.		X				
C	Follow-up on unvented attic roof sheathing problems, as reported by members. Observe problem installations to determine root causes.	X		X			
D	Become a trusted resource for construction industry influencers through field calls, sponsorship, and advertising opportunities.	X	X				
	Total						**$12,500**

***FS = Field Services**

MC = Marketing Communications

TS = Technical Services

MR = Market Research

QS = Quality Services

Market Objective IV – RESEARCH

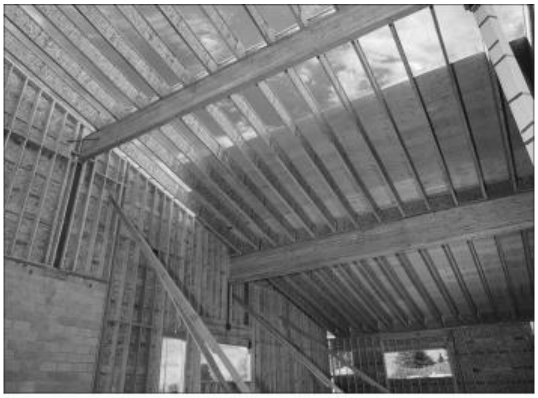
Understand opportunities and threats to member products.

Market Description: Residential market research.

Current Situation/Comments: APA has purchased residential research from the NAHB Research Center (now Home Innovations Research Labs) since 1995. This information tracks the total volume of member products used in residential construction. It will also provide tracking for products in the marketing plan, such as wall sheathing, I-joists, glulam, and LVL.

		Division Allocation*					
Strategies/Tactics		**FS**	**MC**	**TS**	**MR**	**QS**	**Budget**
A	Purchase the Home Innovation Research Labs residential market survey data for floor systems, beams and headers, and wall sheathing.				X		$29,000
	Total						**$29,000**

***MR = Market Research**



NONRESIDENTIAL MARKET

2023 MARKET OBJECTIVES

I. ALIGN ACTIVITIES WITH WOOD PRODUCT ORGANIZATIONS
Create collaborative marketing and technical development activities with WoodWorks and other wood products organizations and associations.

II. INFLUENCE THE NONRESIDENTIAL DESIGNER AND FRAMER COMMUNITIES
Expand the use of wood framed construction in low-rise nonresidential buildings including schools, retail, and office space.

III. INFLUENCE THE MULTIFAMILY DESIGNER AND FRAMER COMMUNITIES
Maintain the use of wood framed construction in multi-family buildings.

IV. ACT ON OPPORTUNITIES AND ISSUES
Monitor and act on current market issues and interests to retain existing wood product use or to advocate for expanded use of wood products.

NONRESIDENTIAL MARKETS

Support the growth of wood structural panel and engineered wood market share in nonresidential market applications

NONRESIDENTIAL PLAN – SUMMARY OF BUDGET AND STAFF TIME

2023 NONRESIDENTIAL PLAN SUMMARY			
Market Objective	Budget	Budget (%)	Staff Time (%)
I. Align with Wood Partners	$ 51,500	53%	10%
II. Grow NR Market	$ 14,500	15%	26%
III. Protect MF Market	$ 16,500	17%	32%
IV. Act on Opps. & Issues	$ 15,000	15%	32%
Total	$ 97,500	100%	100%

Market Size:

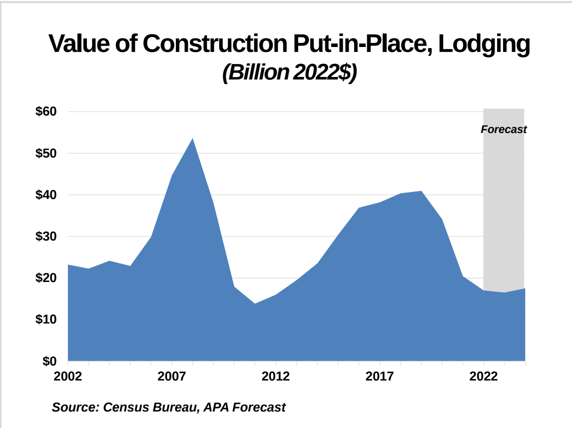
	Est. 2022 Volume	2023 Forecast	2024 Forecast
Wood Structural Panels			
Bil. Sq. Ft	2.957	2.890	2.932

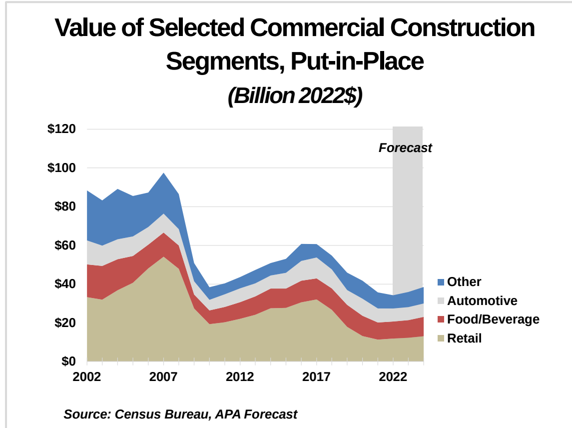
Market Description:

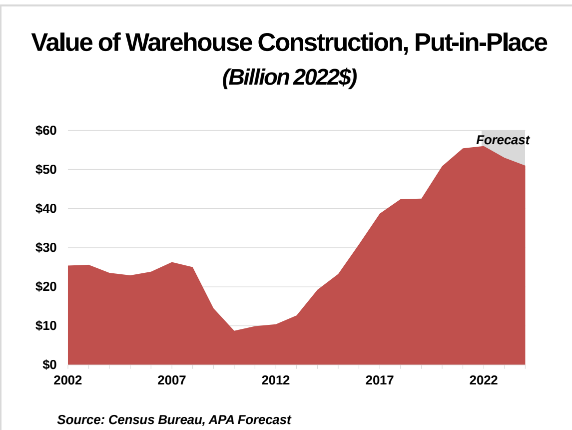
For this version of the Strategic Marketing Plan, four sectors of nonresidential construction are reviewed. They are lodging, commercial, warehouse and education. The historical data shown are Census Bureau estimates of the value of construction put-in-place and are adjusted for inflation using the specific deflators for each sector. The estimates include the value of new construction and refurbishment expenditures. The COVID pandemic seriously impacted the level of construction in each of these sectors. Starting with lodging, hotel occupancy rates plunged in 2020 as business and vacation travel fell sharply because people were reluctant to be in close quarters with others. Cash flow dried up quickly and delinquency rates on loans supporting the industry rose. In turn, construction fell to a level approaching that of 2010–12. It appears that the bottom has been reached. With the economy likely to be in recession, investment in lodging will tread water for two years. Investment in commercial structures peaked in 2017, as the growth of e-commerce changed the dynamics for retailing. The COVID outbreak reinforced that shift. Vacancy rates in retail remain at record levels, despite the drop in construction. This sector will also tread water through 2024. Demand for warehouse space boomed on the heels of the growth of e-commerce. Vacancy rates are at historic lows and rent increases exceed 10%. Investment in warehouse space may be at a peak but will remain at an historically high level through 2024. Declines in enrollments at all levels have played a key role in driving down public sector investment in education facilities. Budget pressures on state and local governments will prevent any recovery in school construction in the next two years.

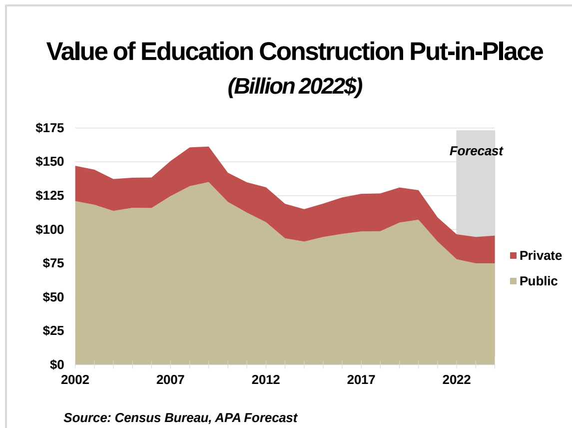
NONRESIDENTIAL MARKETS

Support the growth of wood structural panel and engineered wood market share in nonresidential market applications









Strategic Imperatives

- Designers and other nonresidential decision makers must understand engineered wood products and easily access the technical information necessary for design and construction.
- Designers must recognize the value of engineered wood from both an economic and sustainability standpoint.
- General contractors and framers must understand how to properly install engineered wood products so that satisfied performance is achieved.
- Industry efforts to grow wood use in nonresidential buildings must be coordinated between organizations.
- Designers and other nonresidential decision makers must believe that North American engineered wood products manufactured by APA members offer superior, consistent performance and value compared to competitive products.

Market Objective I – ALIGN ACTIVITIES

Create collaborative marketing and technical development activities with WoodWorks and other wood products organizations and associations.

	Strategies/Tactics	Division Allocation* FS	MC	TS	MR	QS	Budget
A	Coordinate educational activities with wood products organizations to maximize the wood industry's investment in educating designers, developers and building owners.	X					
B	Foster field staff relationships of partner wood product organizations to move key initiatives forward.	X					
C	Coordinate media messaging to enhance visibility of an overall, consistent message from the wood frame construction industry.		X				
D	Partner with other associations in joint educational activities.						
	1 Participate at a sponsorship level in the U.S. WoodWorks Wood Design Symposiums (WDS).	X					$50,000
	2 Partner with AWC in training design professionals and code officials.	X					
	3 Exhibit and present at one Wood Solutions Fair in Canada.	X					$1,500
E	Partner with AWC and CWC in their efforts to change the building codes to permit taller and larger mass timber wood frame buildings.						
	1 Work with AWC to address technical barriers to taller and larger buildings.			X			
	Total						**$51,500**

***FS = Field Services**

MC = Marketing Communications

TS = Technical Services

MR = Market Research

QS = Quality Services

Market Objective II – INFLUENCE NONRESIDENTIAL DESIGNERS AND FRAMERS

Expand the use of wood framed construction in low-rise nonresidential buildings including schools, retail, and offices.

Strategies/Tactics		Division Allocation FS	MC	TS	MR	QS	Budget
A	Build consultative relationships with key decision makers (designers and framers) in the targeted regional markets: Seattle-Tacoma, Portland-Vancouver, Southern California, Denver, Houston, Philadelphia, and the Carolinas.						
	1 Meet/consult with NR designers addressing their wood frame construction needs & challenges.	X					
	2 Educate key nonresidential designers through seminars (in person or remote) on topics including lateral design, engineered wood beams, and resiliency.	X					
B	Build consultative relationships with general contractors and framers to expand the use of wood frame construction.						
	1 Meet/consult with NR framers addressing their wood frame construction needs & challenges.	X					
	2 Educate general contractors and framers on the proper installation of engineered wood products to maximize their value.	X					
	3 Promote framer training through editorial content in trade media.		X				
	4 Maintain membership and liaison with the Structural Roof Erectors Association (SREA) to promote the use of wood in commercial roof markets.	X					$1,000
	5 Work with the Western States Roof Contractors Assoc. to help mititgate their moisture issues with wood panels.	X					$1,000
C	Maintain and enhance the APA website as a main information portal for designers.						
	1 Maintain and update the nonresidential content on apawood.org.		X				
	2 Develop and publish qrtly APA Designers Circle newsletter.	X	X				
	3 Develop and host two national educational webinars and post the recordings on the apawood.org site.	X	X				

Market Objective II – INFLUENCE NONRESIDENTIAL DESIGNERS AND FRAMERS

Expand the use of wood framed construction in low-rise nonresidential buildings including schools, retail, and offices. (continued)

		Division Allocation*					
	Strategies/Tactics	**FS**	**MC**	**TS**	**MR**	**QS**	**Budget**
D	Build the subscriber base for the Designers Circle newsletter and apawood.org by marketing directly to architects and engineers.						
	1 Use programmatic advertising and other digital promotions to increase traffic to nonres webpages on www.apawood.org.		X				$12,500
	2 Utilize free social media platforms to promote the Designers Circle newsletter, APA continuing education events, and to link contacts with area FSD staff through the LinkedIn Designers Circle group and APA staff members' pages.	X	X				
E	Reassess the use of EWPs in warehouse construction.						
	1 Call on structural roof erectors and designers to assess opportunities for EWP in their projects.						
	2 Promote the all-wood roof LCA comparison (to an all steel or hybrid roof) and print for distribution by field staff.	X	X				
	Totals						**$14,500**

***FS = Field Services**

MC = Marketing Communications

TS = Technical Services

MR = Market Research

QS = Quality Services

Market Objective III – INFLUENCE MULTIFAMILY DESIGNERS AND FRAMERS

Maintain the use of wood framed construction in low-rise multifamily buildings.

		Division Allocation					
Strategies/Tactics		FS	MC	TS	MR	QS	Budget
A	Build consultative relationships with key decision makers (designers and framers) in the targeted regional markets: Seattle-Tacoma, Portland-Vancouver, Southern California, Denver, Houston, Philadelphia, and the Carolinas.						
	1 Meet/consult with MF designers addressing their wood frame construction needs & challenges.	X					
	2 Educate key nonresidential designers through seminars (in person or remote) on topics including lateral design, engineered wood beams, and resiliency.						
B	Build consultative relationships with general contractors and framers to protect the use of wood frame MF construction.						
	1 Meet/consult with NR framers addressing their wood frame construction needs & challenges.	X					
	2 Educate general contractors and framers on the proper installation of engineered wood products to maximize their value.	X					
	3 Promote framer training through editorial content in trade media.		X				
	4 Implement messages identified from value proposition for fully sheathing walls with wood structural panels in CA.	X					
C	Maintain and enhance the APA website as a main information portal for designers.		X				
D	Build the subscriber base for the Designers Circle newsletter and apawood.org by marketing directly to architects and engineers.		X				$12,500
E	Promote the success of 5 story (US) and 6 story (Canada) buildings to gain broader acceptance by designers and code officials.	X	X	X			

Market Objective III – INFLUENCE MULTIFAMILY DESIGNERS AND FRAMERS

Maintain the use of wood framed construction in low-rise multifamily buildings. (continued)

		Division Allocation*					
Strategies/Tactics		**FS**	**MC**	**TS**	**MR**	**QS**	**Budget**
F	Promote ways to save time in wood frame construction. Consult with off-site construction framers and their designers in multifamily/hotel construction.						
	1 Call on modular manufacturers supplying the nonresidential market to better understand EWP opportunities	X					
	2 Work with panelizers to identify what installation related problems they have with EWPs.	X					
	3 Exhibit at World of Modular to assess ability to influence and grow relationships for 2024 exhibiting/speaking opportunities	X					$4,000
G	Promote the use of mass timber shaft walls in place of concrete cores in light-frame wood hotel and multifamily construction.						
	1 Call on framers and designers to 3ncourage use of mass timber in their projects.	X					
	2 Promote a case study featuring the use of mass timber such as shaft walls in place of concrete cores	X	X				
	Total						**$16,500**

***FS = Field Services**
MC = Marketing Communications
TS = Technical Services
MR = Market Research
QS = Quality Services

Market Objective IV – ACT ON OPPORTUNITIES AND ISSUES

Monitor and act on current market issues and interests to retain existing wood product use or to advocate for expanded use of wood products

	Strategies/Tactics	FS	MC	TS	MR	QS	Budget
		Division Allocation					
A	Promote fire safety of wood framed systems to design professionals, framers, and fire personnel.						
	1 Continue membership and participation on AWC Fire Subcommittee to assure equitable recognition of EWP.			X			
	2 Provide visibility for the wood industry's best building practices regarding construction fires to major multifamily construction companies and developers as developed in 2022 for NR framer training (slides and recording in use).	X					
B	Promote APA's resources for fire-safe design.						
	1 Educate on Type III construction assemblies including: FRT research of LVLs and glulams, char resistance of EWPs, and readily available assemblies.	X					
	2 Champion APA's newly tested 1 layer, 1-hour fire-rated floor/ceiling assembly through the creation of APA literature and training.	X					
C	Support education opportunities for wood framing skilled laborers.						
	1 Promote the Spanish on-demand recording of our nonresidential framer training	X	X				
	2 Explore opportunities to partner with the Association of General Contractors Workforce Development efforts in target markets.	X					
D	Promote the resiliency of wood framed systems to designers and framers. (See Res. I.B.2)						
	1 Promote APA's sustainability messaging (2020 and 2022 on-demand webinars, APA website) to validate the environmental advantages of wood products.		X				
	2 Track the use and effectiveness of developed sustainability slides for FSD to use in education of designers and framers.	X					
	3 Audit the Industrialized Wood-Based Construction Conference at Greenbuild to research the value in exhibiting or speaking at this event in 2024.	X					$1,000

Market Objective IV – ACT ON OPPORTUNITIES AND ISSUES

Monitor and act on current market issues and interests to retain existing wood product use or to advocate for expanded use of wood products (continued)

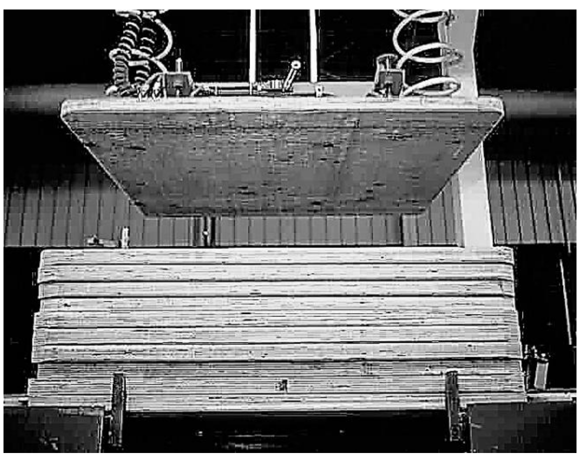
Strategies/Tactics			Division Allocation FS	MC	TS	MR	QS	Budget
E	Identify the actions and messaging of competitive products such as steel, concrete, and masonry.							
	1	Identify and work with other wood industry associations to neutralize national, state and local code change proposals and tax/insurance incentives that advantage concrete structures and disadvantage wood construction.	X		X			
	2	Work with the industry's Issues Crisis Management Team to share defensive messaging or FAQ to respond to negative messaging.		X				
	3	Keep a lookout for new competitive products (ex.Comslab, magnesium oxide structural panels) in market and related messaging to compete with wood construction.	X	X				
F	Promote wood construction to wood design professionals.							
	1	Participate in the American Society of Civil Engineers (ASCE) Structural Engineering Institute (SEI) Wood Education committee. (See Supporting Programs I.F)	X	X	X			
	2	Co-sponsor the Timber Strong Design-Build competition along with AWC and Simpson Strong-Tie to inspire engineering students to consider wood construction in their future careers. This covers 8-10 regional events for ASCE	X	X				$10,000
G	Promote the use of hybrid all-wood mass timber buildings (e.g. CLT with glulam/LVL) in areas where it can add value to the design of a structure.							
	1	Provide educational messaging on the APA website and in field calls and seminars.	X					
	2	Promote glulam and SCL as mass timber building components. Use case studies and introductory guide to mass timber utilizing glulam, SCL, and/or WSP overlays on mass timber to demonstrate to designers the use of lighter EWPs in mass timber construction.	X					
	3	Attend the Mass Timber Conference to research the value in exhibiting or speaking at this event in 2024.	X					$1,000

Market Objective IV – ACT ON OPPORTUNITIES AND ISSUES

Monitor and act on current market issues and interests to retain existing wood product use or to advocate for expanded use of wood products (continued)

	Strategies/Tactics	Division Allocation* FS	MC	TS	MR	QS	Budget
H	Promote the structural benefits of wood framed systems to designers and framers.						
	1 Promote APA's Force Transfer Around Openings (FTAO) tools, including the calculator, technical note, and webinars.	X	X	X			
	2 Update FTAO calculator as needed	X	X	X			
	3 Update the APA publication L350, Shear walls and diaphragms and use as training tool with designers and print copies for FSD distribution to use in education of designers and framers.	X	X	X			$1,000
	4 Attend the National Council of Structural Engineers Associations (NCSEA) and the ASCE Structural Engineering Institute (SEI) Structures Congress to research the value in exhibiting or speaking at this event in 2024.	X					$2,000
	Total						**$15,000**

***FS = Field Services**
MC = Marketing Communications
TS = Technical Services
MR = Market Research
QS = Quality Services



INDUSTRIAL MARKET

2023 MARKET OBJECTIVES

I. **PERFORMANCEPANELS.COM**
Feature the use of structural panels in industrial applications to manufacturers, decision makers and specifiers through the website and electronic media

II. **TARGETED PROMOTION AND TRAINING**
Promote advantages of performance panels to specific groups of industrial market specifiers

III. **PRODUCT PERFORMANCE**
Leverage and promote the known quality, performance and green attributes of APA products over competitive products

IV. **CONCRETE FORMING**
Promote the use of wood structural panels and other engineered wood products in concrete formwork

INDUSTRIAL MARKETS

Maintain wood structural panel and EWP share in industrial market applications

INDUSTRIAL PLAN – SUMMARY OF BUDGET AND STAFF TIME

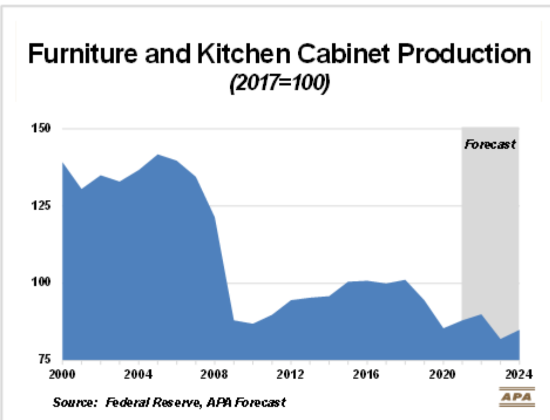
2023 Industrial Market Plan				
Market Objective	Budget		Industrial Budget (%)	Estimated Staff Time (%)
I. Performance Panels	$	30,000	58%	27%
II. Targeted Promotion	$	5,000	10%	14%
III. Product Performance	$	1,500	3%	32%
IV. Concrete Form	$	15,500	30%	27%
Totals	**$**	**52,000**	100%	100%

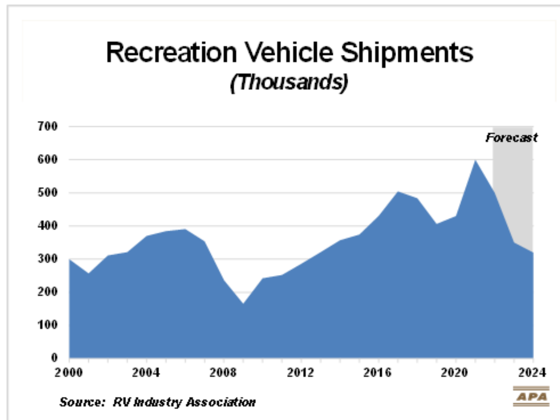
Market Size:

Wood Structural Panels	Est. 2022 Volume	2023 Forecast	2024 Forecast
MM Sq. Ft	7.019	6.747	6.740

Market Description:

The industrial market comprises a wide array of end-use applications for structural panels. The need for containers and bins to transport components for assembly and getting final goods to market follows the trend in manufacturing output. As shown in the chart below, manufacturing output in 2022 is projected to be up 3.5%. The expectation of a recession in 2023 points to a drop in manufacturing output of 2.5% with a modest recovery of 1.5% in 2024. Last year was a record year for recreational vehicle (RV) production as shipments totaled 600,000. This year started out like gangbusters for the industry. Since March though, shipments have been on a downward trend. High gas prices, loss in discretionary income due to inflation and higher financing costs are the drivers. These forces are expected to remain in place through 2024. Therefore, shipments in 2022 are forecast to total 500,000 and fall to 350,000 and 320,000 in 2023 and 2024, respectively. Prospects for the furniture and cabinet industries have also dimmed over the course of 2022 with home sales and starts on the decline and the loss in discretionary income due to inflation. Home sales and starts are forecast to be down again in 2023 and with a recession leading to diminished consumer sentiment, furniture and cabinet demand and in turn production is forecast to fall 9%. Furniture and cabinet imports are expected to gain share of sales in the U.S. market, although most of the penetration from countries like China and Vietnam was played out in the prior decade.





Strategic Imperatives

Industrial users and decision makers must:

- Understand the differences between panel types and grades and how they perform in specific applications.
- Be able to easily locate and access information about APA member products, including specialty products.
- Believe that North American engineered wood products manufactured by APA members offer superior, consistent performance and value compared to competitive products.
- Understand the attributes of wood structural panels and SCL in specific applications.
- Correctly specify and easily locate APA member products for their industrial application.
- Understand how use of engineered wood products, compared to non-renewable, competitive products, can help meet their ESG goals.
- Be able to find and link to APA manufacturers and their information about their industrial market products.

Market Objective I – PERFORMANCEPANELS.COM

Promote the use of structural panels in industrial applications to manufacturers, decision makers and specifiers through the website and electronic media.

	Primary Strategies/Tactics	Division Allocation* FS	MC	TS	MR	QS	Budget
A	Maintain and monitor the industrial market promotional website, PerformancePanels.com.		X				
B	Develop new content and enhance existing content and features to provide maximum value and information related to APA member products.	X	X				
C	Utilize relevant data to better understand website users and their needs for industrial product information.		X				
D	Use marketing and social media to grow traffic to Performance Panels website and promote APA products in industrial applications.		X				$30,000
	Totals						**$30,000**

***FS = Field Services**
MC = Marketing Communications
TS = Technical Services
MR = Market Research
QS = Quality Services

Market Objective II – Targeted Promotion and Training

Promote advantages of performance panels to specific groups of industrial market specifiers.

		Division Allocation					
Primary Strategies/Tactics		**FS**	**MC**	**TS**	**MR**	**QS**	**Budget**
A	Educate packaging engineers and other industrial engineers on engineered wood products and their materials handling applications	X	X				
	1 Promote build a box specification		X				
	2 Offer virtual webinars to universities and trade schools educating them on the importance of specifying products produced to known standards	X					
B	Provide training to distributors selling into the industrial markets to better understand engineered wood products and applications in industrial markets	X					
	1 Educate on the value of standards as well as costs of no standards; reliability, known level of performance and the customer getting what they want.		X				
C	Exhibit at the RV Hall of Fame Suppliers Show in Elkhart, IN, in the Fall to promote the use of APA engineered wood products in the transportation industry	X	X				$5,000
	Totals						**$5,000**

***FS = Field Services**
MC = Marketing Communications
TS = Technical Services
MR = Market Research
QS = Quality Services

Market Objective III – PRODUCT PERFORMANCE

Leverage and promote the known quality, performance and green attributes of APA products over competitive products

		Division Allocation					
	Primary Strategies/Tactics	FS	MC	TS	MR	QS	Budget
A	Leverage APA-trademarked products over competitive products, including imported panels and non-wood substitute products.		X				$1,500
B	Challenge non-certified and mislabeled products in the marketplace.	X		X		X	
C	Educate industrial end users on EPA Formaldehyde Emission Standards for Composite Wood Products.		X			X	
D	Promote the environmental benefits of wood in Industrial markets		X			X	
	Totals						**$1,500**

***FS = Field Services**

MC = Marketing Communications

TS = Technical Services

MR = Market Research

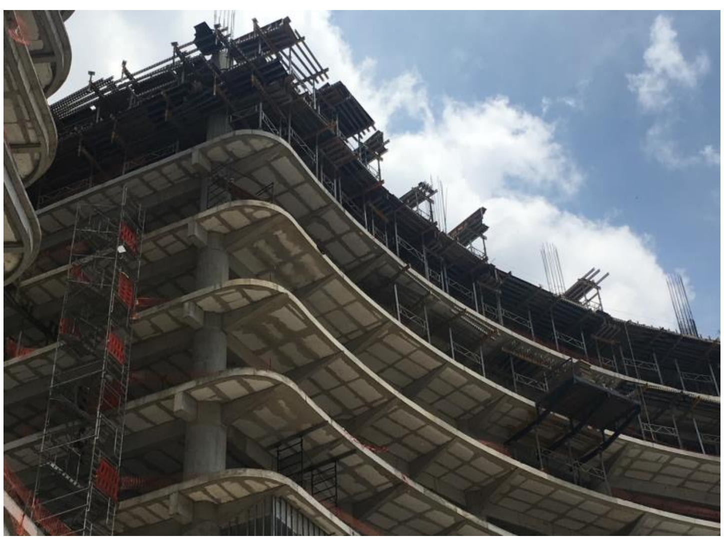
QS = Quality Services

Market Objective IV – CONCRETE FORMING

Promote the use of wood structural panels in concrete formwork and generate awareness for engineered wood products in concrete form framing

		Division Allocation					
Primary Strategies/Tactics		**FS**	**MC**	**TS**	**MR**	**QS**	**Budget**
A	Maintain and promote the website and the Concrete Forming Design Guide to educate users on the benefits of APA concrete forming products.	X	X				$15,500
	1 Feature the updated Concrete Forming Design Guide using a recorded video	X	X				
B	Promote a level playing field and continue to proactively challenge imported concrete forming panels	X	X				
C	Promote the use of engineered wood products in concrete form work.	X	X				
	Totals						**$15,500**

***FS = Field Services**
MC = Marketing Communications
TS = Technical Services
MR = Market Research
QS = Quality Services



INTERNATIONAL MARKET

2023 MARKET OBJECTIVES

I. LATIN AMERICAN CONSTRUCTION AND INDUSTRIAL MARKETS

II. ASIAN CONSTRUCTION AND INDUSTRIAL MARKETS

III. AUSTRALIA AND OTHER MARKETS

IV. GLOBAL MARKET ACCESS, CODES AND PROMOTION

V. STRATEGIES AND TACTICS

VI. NON-SMP BUDGET TABLE

SECTION I – LATIN AMERICAN CONSTRUCTION AND INDUSTRIAL MARKETS

Expand North American structural wood panel and engineered wood product usage in construction and industrial applications in Latin America, including Mexico, the Caribbean, Central and South America.

Exported Product and Destination	North American Export Volume/Value
Structural Wood Panels to Mexico	226 million sq. ft. / $65 million
Structural Wood Panels to Central America and Caribbean	82 million sq. ft. / $33 million
Structural Wood Panels to South America	18 million sq. ft. / $5 million
Engineered Wood Products to Latin American Countries	$33 million

(Trade Data Monitor, 2021; North American exports to Mexico, the Caribbean and Central and South America)

Market Description: Though complete information does not exist regarding a breakdown of product usage in these markets, estimates are that more than 90 percent of all North American structural panel imports are used in construction or industrial applications in Latin American markets. Plywood panels are commonly used in most aspects of concrete form work from small projects, such as cisterns for single-family houses to large multistory units. Most plywood panels used are CD or shop grade. Large-scale builders are starting to use HDO and MDO panels, primarily in Mexico, Guatemala, and Panama. OSB is being used for construction sheathing in northern tier states of Mexico and in certain other markets, such as Chile and Colombia. Opportunities may exist for OSB sheathing in large-scale non-residential hybrid roof systems in the northern states of Mexico. Both plywood and OSB are used in Mexico for furniture frames and crating/packaging.

Target Audience: The target audience is diverse, from panel and building material distributors, packaging companies and furniture manufacturers, to high-rise developers, contractors, architects, engineers, academia, and small builders.

Needs: Products which offer competitive value at an affordable price. Small builders are looking to buy small quantities.

Competitive Products: Local Latin American-produced lumber, locally manufactured plywood, imported noncertified plywood, South American manufactured OSB, metal concrete forms, and concrete.

***Strategic Imperatives*:**

Nonresidential Construction

- Latin American developers, architects, and general contractors must specify North American certified panels for concrete forming and hybrid roof systems.

Residential Construction

- Latin American construction companies must specify the use of trademarked North American plywood, OSB and other engineered wood products for roof, wall, and floor construction.

Industrial Applications

- Latin American panel distributors, furniture manufacturers, packaging companies, etc., must specify North American certified plywood and OSB.

SECTION I – LATIN AMERICAN CONSTRUCTION AND INDUSTRIAL MARKETS

Expand North American structural wood panel and engineered wood product usage in construction and industrial applications in Latin America, including Mexico, the Caribbean, Central and South America.

Strategies/Key Tactics		Division Allocation FS	MC	TS	MR	QS	Non-APA Budget
A	Outbound and in-bound trade and technical missions; trade show promotion; seminar and webinar promotion; trade servicing meetings; website, media and social media outreach; newsletter and case study development and publication; promotional and technical literature development, translation and publication; market research; evaluation survey work to gauge effectiveness of efforts; and, in-market representation.						$760,000
	Total						**$760,000**

SECTION II – ASIAN CONSTRUCTION AND INDUSTRIAL MARKETS

Expand North American structural wood panel and engineered wood product usage in construction applications in Japan, Greater China and Korea and in industrial applications in Vietnam and Greater China.

Exported Product and Destination	North American Export Volume/Value
Structural Wood Panels to Japan	157 million sq. ft./ $41.4 million
Structural Wood Panels to China and Taiwan	78 million square feet / $17.8 million
Structural Wood Panels to Vietnam	15 million square feet / $4 million
Structural Wood Panels to South Korea	10 million square feet / $3 million
Engineered Wood Products to Asian Countries	$13.7 million

(Trade Data Monitor, 2021)

Construction Market Description: Use of structural wood panels as sheathing in wall, roof, and floor applications in platform-frame and post & beam construction, as well as in high-performance shear wall systems such as Midply and in hybrid infill wall systems in Japan and/or Korea. Glued laminated timber, wood I-joists and structural LVL use as structural elements in floor, roof and wall systems in wood and hybrid non-residential construction.

Target Audience: Residential and nonresidential builders, building materials wholesalers and suppliers, architects, engineers, precutters and panelization plants.

Construction Market Needs: Stable supply, high-strength products and species, documented structural performance, durability, low formaldehyde emission product, and competitive price. For Japan, Japanese/metric sizes and JAS certification.

For roof, wall, and floor sheathing, competing products include: Japanese domestic softwood plywood; Japanese, Indonesian, and Malaysian hardwood plywood; European OSB; lumber; and Japanese structural MDF and particleboard.

For structural members, competing products include: Domestic and imported softwood lumber (both green and kiln-dried), tropical lumber, Japanese, European, Chinese and Taiwanese glulam, steel beams and concrete systems.

Strategic Imperatives:

- Codes and standards must recognize attributes of North American structural panels and engineered wood products and related building systems for usage in construction.
- Architects and builders must specify North American wood products in structural applications as their material of choice.

Industrial Market Description: Panels are used in industrial applications, such as upholstered furniture frames and cabinetry.

Target Audience: Upholstered furniture manufacturers, designers, packaging companies, panel distributors, etc.

Needs: Consistent availability, documented structural performance, durability, and competitive price. CARB exemption and Lacey Act compliance needed for certain industrial products to be re-exported to North America.

Competing products: Chinese and Southeast Asian plywood, particleboard, MDF, blockboard, Chinese and European OSB.

Strategic Imperatives:

- Industrial panel specifiers need to understand the advantages and benefits of using North American certified structural panels in industrial applications for product consumed in their own countries as well as finished products, such as upholstered furniture, exported to North America.

SECTION II-A – ASIAN CONSTRUCTION AND INDUSTRIAL MARKETS (U.S.)

Expand North American structural wood panel and engineered wood product usage in construction applications in Japan, Greater China and Korea and in industrial applications in Vietnam and Greater China.

Strategies/Key Tactics		Division Allocation					Non-APA Budget
		FS	MC	TS	MR	QS	
A	Outbound and in-bound trade and technical missions; trade show promotion; seminar and webinar promotion; trade servicing meetings; website, media and social media outreach; newsletter and case study development and publication; promotional and technical literature development, translation and publication; market research; evaluation survey work to gauge effectiveness of efforts; and, in-market representation.						$537,000
	Total						**$537,000**

SECTION II-B – ASIA EXPORT PROMOTION (CANADA)

Develop and expand construction markets for APA member products

Strategies/Key Tactics		Division Allocation					Non-APA Budget
		FS	MC	TS	MR	QS	
B	Outbound and in-bound trade and technical missions; trade show promotion; seminar and webinar promotion; trade servicing meetings; website and media outreach; newsletter and case study development and publication; promotional and technical literature development, translation and publication; evaluation survey work to gauge effectiveness of efforts; and, in-market representation.						CAD 527,000
	Total						**CAD 527,000**

SECTION III – AUSTRALIA AND OTHER MARKETS

Secure and maintain global market access for APA member products

Exported Product and Destinations	North American Export Volume/Value
LVL, Wood I-Joists and Glulam to Australia/New Zealand	*$51 million*
Engineered Wood to Greater Europe	*$10 million*
Engineered Wood to the Middle East	*$1 million*
Structural Wood Panels to Greater Europe	*17 million square feet / $11 million*

(Trade Data Monitor, 2021)

Export Overview: Excluding U.S.-Canada trade, 2021 overseas export volumes of North American structural panels reached 611 million square feet, 3/8th's inch basis, with a value of $184 million. 2021 North American LVL, wood I-joist, glulam and other fabricated structural wood offshore exports totaled $113 million.

Market Description: Structural laminated veneer lumber, wood I-joists, glulam and other engineered wood products are used as structural elements in wall, floor, and roof systems in residential and non-residential wood and hybrid construction. Softwood plywood is used for concrete form work.

Target Audience: Residential and nonresidential building industry trade including architects, builders, contractors, importers, and distributors.

Needs: Availability on a sustained basis, local code/standard acceptance, documented structural performance, durability, and competitive price.

For engineered wood, competing products include: Australian, New Zealand, European, Russian and Chinese LVL, glulam and/or wood I-joists, tropical lumber, concrete, steel beams, and kiln-dried lumber from various producing regions.

For structural panels, competing products include: European, South American, Southeast Asian and Chinese plywood.

Strategic Imperatives:

- Governmental agencies in developing nations must recognize the structural performance capabilities and other superior attributes of North American engineered wood products and systems.
- Architects and builders must specify certified North American engineered wood products.

		Division Allocation					Non-APA
Strategies/Key Tactics		**FS**	**MC**	**TS**	**MR**	**QS**	**Budget**
A	Outbound and in-bound trade and technical missions; trade show promotion; seminar promotion; trade servicing meetings; market research.						$174,000
	Total						**$174,000**

SECTION IV – GLOBAL MARKET ACCESS AND PROMOTION

Secure and maintain global market access for APA member products

Market Description: North American structural wood panels and engineered wood products are used overseas in construction and industrial market applications. For residential and nonresidential construction, structural wood panels are used as sheathing in floor, wall, and roof applications or for concrete forming. Glued laminated timbers, laminated veneer lumber, wood I-joists and other engineered wood products are used as structural elements in wall, roof, and floor systems. In most countries, the competing construction technology is concrete-based masonry, steel, bricks, and concrete block.

Target Audience: Regulatory authorities, residential and nonresidential builders, builder and contractor associations, architects, engineers, academia, importers and distributors and industrial application specifiers.

Needs: Stable supply, local code/standard acceptance, documented structural performance, durability, and competitive price.

Strategic Imperatives:

- Regulatory authorities must recognize the structural performance capabilities of North American structural wood panels and other engineered wood products in international and national product standards and building codes.
- North American structural wood panels and other engineered wood products must be protected from unfair trade practices through multilateral and bi-national trade agreements.
- Construction industry specifiers need to understand the structural performance capabilities and other positive attributes of North American structural wood-based panels, glued laminated timber, wood I-joists and laminated veneer lumber and their proper application, and designate their usage.

Strategies/Key Tactics		Division Allocation					Non-APA Budget
		FS	MC	TS	MR	QS	
A	Market access work with foreign governments and industry associations; building codes and wood products standards development and harmonization; educational and technical promotion.						$135,000
	Total						**$135,000**

SECTION V - STRATEGIES AND TACTICS

APA's U.S. and Canadian international market development and market access programs are funded through leveraged resources from the U.S. Department of Agriculture, Foreign Agricultural Service (FAS) and the Canadian ministry Natural Resources Canada (NRCan). Funding applications are developed with member input on priorities and as part of a strategic planning process in coordination with U.S. and Canadian industry associations involved in overseas markets, including the American Hardwood Export Council, the Softwood Export Council, the Southern Forest Products Association, the Council of Forest Industries and Quebec Wood Export Bureau.

Strategies and messaging are used with target audiences to create a preference for member products and/or inform regarding product benefits, applications and correct product usage. As referenced in the sections above, APA international program target audiences include: importers, building materials distribution trade, builders, contractors, architects, engineers, project developers, concrete forming system suppliers, industrial panel specifiers, upholstered furniture and cabinetry manufacturers, relevant industry associations, government regulatory authorities, researchers and academia involved in wood product standards and building codes.

APA international program strategies call for creating a preference for APA member products through the following:

- Promotion of the superior strength and consistency of APA member structural wood panel sheathing, engineered wood products and their usage in wood and hybrid building systems that are cost competitive, easier and quicker to construct, energy efficient, environmentally-sustainable and are safe and resilient to seismic and high wind forces.
- Promotion of softwood plywood concrete forming systems, including those allowing for efficient multiple panel re-use and reduction of jobsite waste and product transportation costs.

- Promotion of structural panel usage in hybrid in-fill wall systems to decrease construction costs, improve ease and timeliness of construction and provide better energy efficiency.
- Promotion of the superior strength, consistency, negligible formaldehyde emissions and sourcing of fiber from legally harvested and sustainable forests as attributes of APA member structural wood panels for usage in industrial applications, including upholstered furniture.
- Development of international product standards and building codes that are consistent with those of North America.

Tactics used to develop overseas markets, communicate messaging and gain or maintain market access, include:

- International representatives fluent in Chinese, Japanese, Korean and Spanish interfacing in-market with target audiences/specifiers, responding to trade leads/technical inquiries, supporting members and their exports, etc.
- Trade servicing and technical mission promotion (overseas and in-bound to North America);
- Meetings with specifiers, specifier groups and associations (in-person and virtual);
- Trade show promotion for wood construction, concrete forming and industrial markets (in person, digital and hybrid);
- Promotional and technical seminars, workshops and webinars (in person, digital and hybrid);
- Advocacy of member interests in international wood product standards and building code proceedings;
- Technical research, testing and development supporting innovative construction systems, such as mid-ply walls;
- Websites in Chinese, Japanese, Korean and Spanish with literature downloads, blogs, support for inquiries, etc.;
- Media campaigns, article, newsletter and case study-success story development and placement (printed and digital);
- Social media promotion and postings through accounts on a variety of platforms;
- Translation of APA publications, webinar contents and development of literature/promotional videos in other languages;
- Market research on overseas opportunities and constraints for member products;
- Evaluation questionaries and surveys to gauge activity impacts on specifier perceptions and product selection choices;
- Maintenance and utilization of APA-dedicated overseas specifier and contact databases.

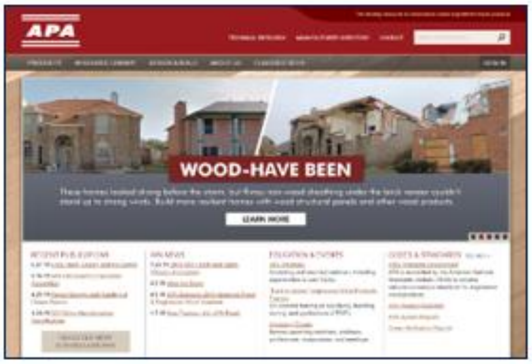
SECTION VI - 2023 APA INTERNATIONAL PROGRAM – NON-SMP BUDGET SUMMARY

U.S. PROGRAM AND LEVERAGED FUNDING AMOUNTS	**FAS* (USD)**
I. LATIN AMERICAN CONSTRUCTION AND INDUSTRIAL MARKETS	$760,000
II. ASIAN CONSTRUCTION AND INDUSTRIAL MARKETS	$537,000
III. OTHER MARKETS – AUSTRALIA, EUROPE AND MIDDLE EAST	$174,000
IV. GLOBAL MARKET ACCESS AND PROMOTION	$135,000
TOTAL	**$1,606,000**

CANADIAN PROGRAM AND LEVERAGED FUNDING AMOUNTS	**NRCAN** (CDN)**
II. ASIAN CONSTRUCTION MARKETS	$527,000
TOTAL	**$527,000**

* Leveraged funding from USDA Foreign Agricultural Service Market Access Program and Foreign Market Development Program.

** Leveraged funding from the Canadian Ministry - Natural Resources' Canada – Expanding Market Opportunities Program, the Province of Alberta and other program partners.



SUPPORTING PROGRAMS

2023 MARKET OBJECTIVES

I. **EDUCATION**
Communicate positive messages and technical details that support the advantages of designing and building with wood.

II. **CODE RECOGNITION**
Protect and advance the use of engineered wood products with code and regulatory officials.

III. **WEB-BASED PROGRAMS**
Provide product and design information, member information and updates through the Association's websites and emerging media technologies.

IV. **PUBLICITY AND MEDIA OUTREACH**
Publicize key APA programs, products and recommendations through outreach to the trade media.

V. **PUBLICATIONS AND ELECTRONIC NEWSLETTERS**
Maintain, update and distribute publications and newsletters that support the use of APA trademarked products.

SUPPORTING PROGRAMS - MARKET OBJECTIVES

Objectives that meet common needs across all or several markets segments.

2023 Supporting Programs Plan			
Market Objective	Budget	Percent of Budget	Estimated Staff Time (%)
I. Education	$ 12,000	19%	16%
II. Code Recognition	$ -	-	39%
III. Web-based Programs	$ 32,000	51%	15%
IV. Publicity and Media	$ -	-	5%
V. Publications	$ 19,000	30%	25%
Totals	**$ 63,000**	100%	100%

Strategic Imperatives

The strategic imperatives necessary to successfully accomplish the APA marketing mission are as follows:

- ***Education:*** Specifiers, designers, buyers and end users must be properly educated on the benefits of wood and the proper selection, specification and installation of APA member products and systems.
- ***User/Specifier Product Acceptance and Preference:*** APA trademarked products must be understood and requested in the marketplace. This requires not only quality, cost-effective products but also ongoing promotion, marketing and service.
- ***Market Access:*** The largest end-use markets are regulated by building codes and standards. Continued acceptance of member products and access to these markets requires credible quality assurance, product testing and research and proactive technical and field services work.
- ***Member Support:*** Broad industry activities are most efficiently accomplished by an association of producers with common goals. A base level of marketing support, including websites, publications, publicity, market research and field assistance, is required for all member manufacturers and product lines.

Ongoing Programs

<u>Websites</u> include the APA family of sites, or URLs, that provide product information and design recommendations, training courses, CAD details and other application-specific information.

<u>Publicity Support</u> includes pursuing editorial opportunities and responding to negative publicity.

<u>Field Support</u> includes promotional calls, seminars/webinars, and technical support to key builders, designers, code officials and other influencers to secure specifications and proper use of member products. Field support also includes handling product observations and providing additional assistance for members, as requested.

<u>Technical Support</u> includes review and technical update of literature, development and maintenance of product standards, application recommendations, building code provisions, and qualification and proprietary testing of member products.

<u>Product Support Help Desk</u> responds to inquiries from engineers, architects, code officials, builders, distributors, members and others, providing guidance on issues related to design, product performance standards, building code recognition and application recommendations for member products.

Market Objective I – EDUCATION

Address information gaps and education needs by communicating positive messages, technical details and construction recommendations that support the advantages of designing and building with wood to key audiences

		Divisional Allocation*					
Strategies/Tactics		FS	MC	TS	MR	QS	Budget
A	Provide product and application information and tools to builders, framing crews and other key audiences, with an emphasis on those who are new, unskilled and inexperienced.	X	X				
	1 Educate users about common construction techniques and framing errors.	X	X				
B	Educate building designers, code officials, builders and other key trade groups on wood design systems.	X	X				$ 6,500
	1 Maintain AIA/CES and ICC Approved Provider status. Offer continuing education credits through AIA, AIBD, ICC and other appropriate professional organizations.	X					$ 2,000
C	Educate dealer/distributors on engineered wood product and application basics.						
	1 Develop, update and promote EWP basics training modules	X	X	X			
	2 Contribute to dealer/distributor organizations		X				$ 3,500
D	Provide educational materials for students at post-secondary and university levels.						
	1 Provide product kits		X				
	2 Develop, update and maintain secondary educational resources online	X	X	X			
E	Promote the green benefits of wood and wood systems to key user groups.	X	X				
	Total						**$ 12,000**

***FS = Field Services**
MC = Marketing Communications
TS = Technical Services
MR = Market Research
QS = Quality Services

Market Objective II – CODE RECOGNITION

Protect and advance the use of engineered wood products with code and regulatory officials

	Strategies/Tactics	Division Allocation* FS	MC	TS	MR	QS	Budget
A	Research, monitor, and eliminate local and regional code blocks.	X		X			$0
B	Research, monitor and participate in development of national model building codes.	X		X			$0
C	Educate building code officials on how APA member products meet code requirements.	X					$0
D	Maintain, update and distribute APA Product Reports.		X	X			$0
	Total						$0

Market Objective III – WEB-BASED PROGRAMS

Provide product and design information, member information, and electronic updates through the Association's websites

	Strategies/Tactics	Division Allocation* FS	MC	TS	MR	QS	Budget
A	Maintain and update APA websites to provide maximum value and information related to APA member products.		X				$ 30,500
B	Maintain, update and promote CAD and REVIT details for download.	X	X	X			$ -
C	Maintain and update APA messaging on social media platforms.		X				$ 1,500
	Total						**$ 32,000**

***FS = Field Services**
MC = Marketing Communications
TS = Technical Services
MR = Market Research
QS = Quality Services

Market Objective IV – PUBLICITY AND MEDIA OUTREACH

Increase communication about key APA programs and recommendations through publicity and outreach to the trade media

	Strategies/Tactics	Division Allocation* FS	MC	TS	MR	QS	Budget
A	Inform target audiences about targeted APA programs, recommended construction systems and new publications and tools.		X				$0
B	Emphasize “Back to Basics” product and construction recommendations in releases and information disseminated through the media.		X				$0
C	Publicize value of APA-trademarked products versus imported products and create preference for APA brand.		X				$0
D	Publicize high wind design recommendations and related publications.		X				$0
E	Work with staff, industry partners and members to maintain a crisis communication strategy.		X				$0
F	Promote APA’s expanded lab capabilities to demonstrate our forward-thinking, scientific, systems approach to the industry and our value as a North American and regional asset.	X	X	X			$0
	Total						**$0**

***FS = Field Services**
MC = Marketing Communications
TS = Technical Services
MR = Market Research
QS = Quality Services

Market Objective V – PUBLICATIONS AND NEWSLETTERS

Maintain, update and distribute publications and newsletters that support the use of APA trademarked products.

		Divisions Allocation*					
	Strategies/Tactics	FS	MC	TS	MR	QS	Budget
A	Printing publications for trade shows, FSD seminars, member mills and other audiences.		X				$ 10,000
B	Develop and update design guides, product guides, builder tips, data files, technical notes, research reports and case studies supporting sheathing/siding, glulam, CLT/mass timber, SCL, I-joist and Rim Board markets.	X	X	X		X	
C	Develop and publish Green Verification Reports on an as-requested basis for individual members.			X			
D	Use electronic newsletters to promote new or updated content and to improve communication about cooperative industry programs, building design recommendations, code activities and other industry topics.		X				$ 9,000
	Total						**$ 19,000**

***FS = Field Services**
MC = Marketing Communications
TS = Technical Services
MR = Market Research
QS = Quality Services

September 26, 2022

APA Marketing Advisory Committee

Chairman: Doug Asano, Roseburg Forest Products Co.
APA Staff Advisor: Tom Kositzky

Industrial Market Subcommittee
Chair: Rich Mills, Hood Industries, Inc.
Staff Advisor: Warren Hamrick

Ed Moroz	Aspen Planers Ltd.
Marc Pratt	Eagle Plywood Specialties
Christie Cordova	Georgia-Pacific Wood Products LLC
Tony Butler	Hunt Forest Products, L.L.C.
Tim Lewis	Murphy Company
Joe MacKay	RoyOMartin
Gray Skipper	Scotch Plywood Company, Inc.
Ken Pratt	Swanson Group Mfg. LLC
Kevin Smith	Timber Products Company
Chris Armanini	Tolko Industries Ltd.
Scott Mellander	Westlam Industries Ltd.
Jason Simpson	Weyerhaeuser

Nonresidential Market Subcommittee
Chair: Geoff Angle, West Fraser
Staff Advisor: Karyn Beebe

Chris Webb	Anthony Forest Products Company LLC
Josh Pounds	Boise Cascade Company
Doug Calvert	Calvert Co., Inc.
John Beers III	Georgia-Pacific Wood Products LLC
Tony Butler	Hunt Forest Products, LLC
JD Dombek	Pacific Woodtech Corp.
Brian Wells	Rosboro
Paul Sehn	Structurlam Mass Timber Corp.
Chris Armanini	Tolko Industries Ltd.
Sarah Fulcher	Weyerhaeuser

International Market Subcommittee
Chair: OPEN
Staff Advisor: Natalie Thelen

Doug Calvert	Calvert Co., Inc.
John Shook	West Fraser
Bobby Byrd	RoyOMartin
Pat Lynch	Timber Products Company
Rhys Thompson	Tolko Industries Ltd.

Residential Market Subcommittee
Chair: Rhys Thompson, Tolko Industries Ltd.
Staff Advisor: Larry Oenning

Greg Wells	Boise Cascade Company
John Chamberlin	Georgia-Pacific Wood Products LLC
Kayla Boyce	LP
Dan Semsak	Murphy Company
Ross Commerford	West Fraser
David Smith	Rosboro
Devin Stuart	Roseburg Forest Products Co.
Bobby Byrd	RoyOMartin
Marla Chappell	Weyerhaeuser

Supporting Programs
Staff Advisor/Chair: OPEN

Members at Large
Anthony Forest Products Company LLC – Tony Sheffield and Jeffrey Stefani
Aspen Planers Ltd. – Abby Mann
Boise Cascade Company – Chris Reiten
Calvert Co., Inc. – Brittany Coltrane
Coastal Forest Resources Company – Bryan Bates and Donnie Vickers
EACOM Timber Corporation – Jeff Kilgour
Eagle Plywood Specialties – Mike Pratt
Hardel Mutual Plywood Corp. – Emmanouel Piliaris
Hood Industries, Inc. – Jay Galloway
IB EWP Inc. – Mark Bartel
Murphy Company – Mark Gryziec and John Murphy Jr.
Natron Wood Products – Rick McDougal and Josh Gibeau
Nordic Structures – Albert Renaud
Pacific Wood Laminates – Rob Rowe
Pacific Woodtech Corp. – Jim Enright and Matt Caissie
PotlatchDeltic – Bob Mai
Richmond Plywood Corporation – Mark Sutherland
RoyOMartin – Scott Poole and Kristie McCurdy
Shelton Lam and Deck – Stephen Ericson
Swanson Group Mfg. LLC – Russ Hellwege
Timber Products Company – Chris Knowles
Tolko Industries Ltd. –Dan Price, Graeme Dick, and Ben Wacker
West Fraser – John Haluska
Weyerhaeuser – Sheli Derato

Marketing Advisory Committee Membership by Company

Anthony Forest Products Company, LLC
Chris Webb
Alts: Tony Sheffield and Jeffrey Stefani

Aspen Planers Ltd.
Ed Moroz
Alt: Abby Mann

Boise Cascade Company
Chris Reiten
Alt: Josh Pounds and Greg Wells

Calvert Co., Inc.
Douglas Calvert
Alt: Brittany Coltrane

Coastal Forest Resources LLC
Donnie Vickers
Alt: Bryan Bates

EACOM Timber Corporation
Jeff Kilgour

Eagle Plywood Specialties
Marc Pratt
Alt: Mike Pratt

Georgia-Pacific Wood Products LLC
Christie Cordova
Alts: John Beers III and John Chamberlin

Hardel Mutual Plywood Corp.
Emmanouel Piliaris

Hood Industries, Inc.
Rich Mills
Alt: Jay Galloway

Hunt Forest Products, L.L.C.
Tony Butler

IB EWP Inc.
Mark Bartel

LP
Kayla Boyce

Murphy Company
Tim Lewis
Alts: Dan Semsak, Mark Gryziec, John Murphy Jr.

Natron Wood Products
Rick McDougal
Alt: Josh Gibeau

West Fraser
Ross Commerford
Alts: Geoff Angle, John Haluska and John Shook

Nordic Structures
Albert Renaud

Pacific Wood Laminates
Rob Rowe

Pacific Woodtech Corp.
JD Dombeck
Alts: Jim Enright and Matt Caissie

PotlatchDeltic
Bob Mai

Richmond Plywood Corporation Ltd.
Mark Sutherland

Rosboro
David Smith
Alt: Brian Wells

Roseburg Forest Products Co.
Doug Asano
Alt: Devin Stuart

RoyOMartin
Bobby Byrd
Alts: Joe MacKay, Kristie McCurdy and Scott Poole

Scotch Plywood Company, Inc.
Gray Skipper

Shelton Lam and Deck
Stephen P. Ericson

Structurlam Mass Timber Corp.
Paul Sehn

Swanson Group Mfg. LLC
Ken Pratt
Alt: Russ Hellwege

Timber Products Company
Pat Lynch
Alt: Chris Knowles and Kevin Smith

Tolko Industries Ltd.
Chris Armanini
Alts: Rhys Thompson, Dan Price, Graeme Dick and Ben Wacker

Westlam Industries Ltd.
Scott Mellander

Weyerhaeuser
Marla Chappell
Alts: Sheli Derato, Sarah Fulcher and Jason Simpson

APA MARKETING MISSION

To be an indispensable partner with APA members in marketing engineered wood products worldwide by:

Providing Market Access

- Ensure APA trademarked products are recognized and accepted by building codes and regulatory jurisdictions.
- Implement and gain recognition for APA/industry product and performance standards.

Enhancing Market Demand

- Create specifier, end-user, and consumer acceptance of, and preference for, APA trademarked engineered wood products.
- Pursue domestic market growth opportunities and counteract threats as directed by members.
- Pursue international market growth opportunities as directed by members and funded by FAS and other agencies.

Providing Market Support Services

- *Market Research, Industry Statistics, and Forecasts*
  Collect, analyze, and report information on product usage, market perceptions, and competitive threats. This market information can then be used for assessing what actions are appropriate for APA. Provide a single source for statistics and data about the engineered wood products industry. Provide industry production forecasts based on demand assumptions developed through market research.

- *Market Communications*
  Communicate the benefits of APA trademarked products and provide consistent, accurate information on the properties and proper use of member products through APA web site, publications, videos, APA Help Desk, field calls, meetings, seminars, publicity, advertising, special promotions, and field support.

- *Field Support*
  Promote APA trademarked products and provide training and education in the specification and use of APA trademarked products through one-on-one meetings, seminars, special programs, and targeted field calls. Provide member assistance, at member's request and cost, on product complaints and claims in the field. Advise members of potential product problems and/or complaints.

MARKETING ADVISORY COMMITTEE CHARTER

Purpose of Committee

To provide recommendations to the APA Board of Trustees for the development and execution of Association marketing programs. To provide linkage between market needs and APA resources.

Membership

Committee membership is open to any representative of an APA member company.

Even though there is no limit on the number of committee participants from a single member company, one person must be designated as that company's primary representative and each company shall have only one vote.

Operating Criteria

APA marketing activities and programs must emphasize value to a broad cross-section of member interests and be designed so as not to negatively target other member-produced engineered wood products.

In order for a proposed program to be recommended to the APA Board of Trustees for approval, it must be approved by at least a two-thirds majority vote of the Marketing Advisory Committee. For a program to be funded and implemented, it must be approved by the APA Board of Trustees.

For proposed activities that are not approved by a two-thirds majority of the committee, those supporting members may pool their resources to fund the particular activity or program. Such funding would be separate from dues. Association staff may accomplish the activity or program using the separate funding if the Board of Trustees approves. All such proposals brought to the Board must include an estimate of staff time required.

REPRESENTING THE ENGINEERED WOOD INDUSTRY

7011 So. 19th St. ▪ Tacoma, Washington 98466 ▪ (253) 565-6600 ▪ Fax: (253) 565-7265

www.apawood.org