PNW Regional Mass Timber Market Study

Completed for:

Pacific Northwest Mass Timber Tech Hub

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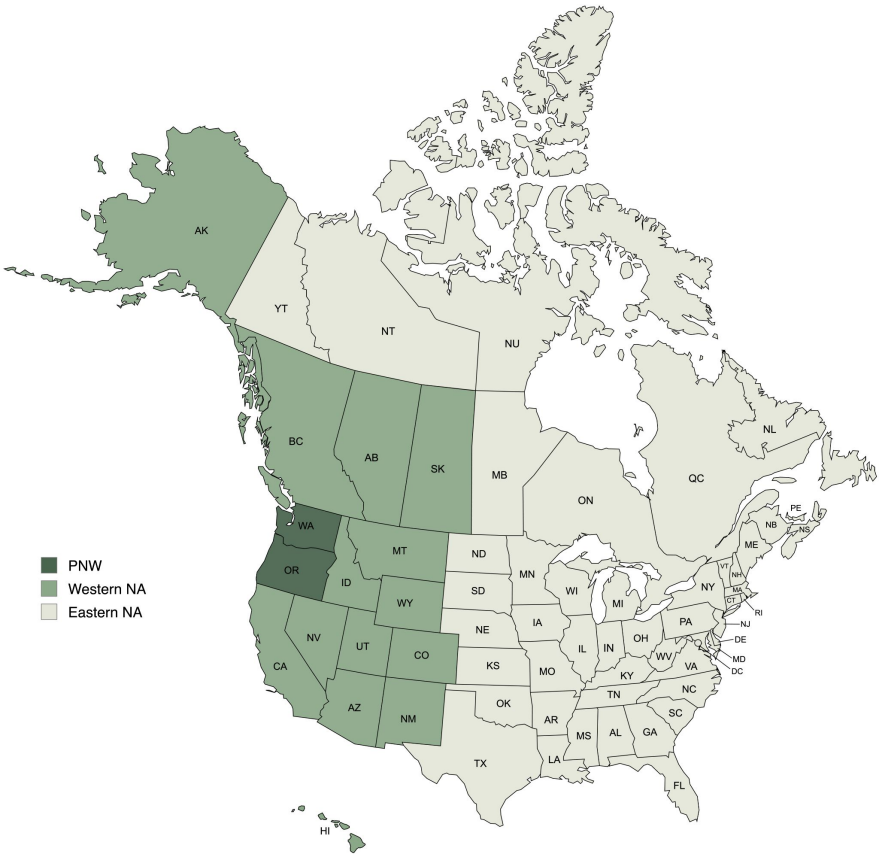
Purpose & Scope

The Market Study addresses the following questions:

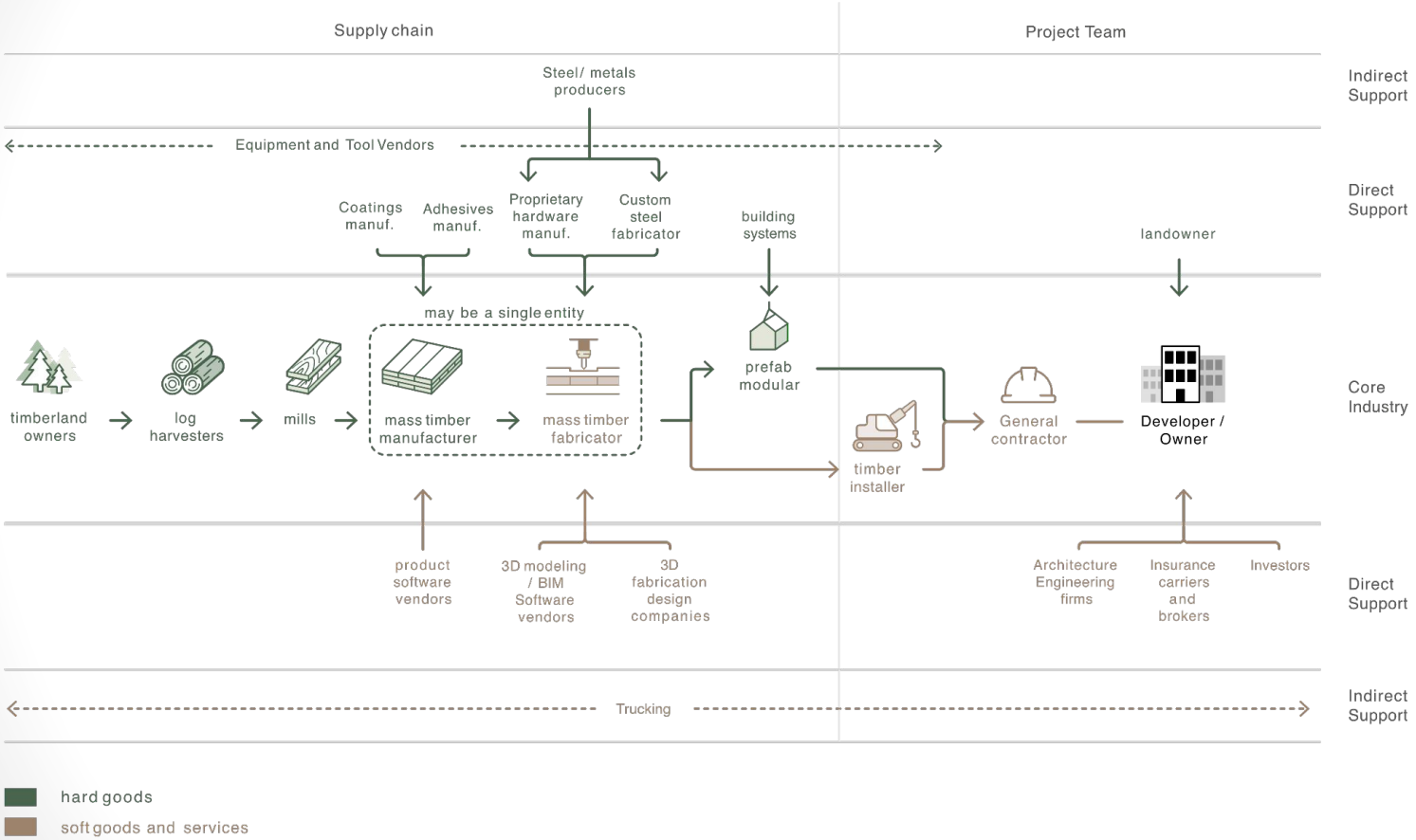
1. What is the current makeup and extent of the region's mass timber industry?
2. What is the current and projected future fiber supply in the PNW?
3. What is the current and future demand for mass timber?
4. What volume of mass timber is currently being produced in the PNW, and what might production be in ten years?
5. What is the current manufacturing capacity for mass timber production in the PNW, and how is that capacity projected to change?
6. What are the top influences on the PNW mass timber ecosystem, impacting demand and supply—constraints, opportunities, and policies?
7. What is the economic impact of the PNW mass timber industry?

Mass Timber Ecosystem

Geographic Boundary



Mass Timber Supply Chain

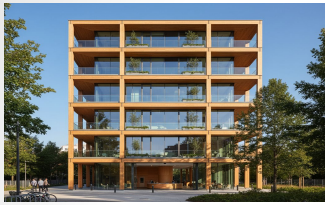


PNW Mass Timber Ecosystem Self Sufficiency

Category	Ecosystem Element	Current Availability (maximum of 5 if widely available)				Strategic Importance	Feasibility of Internal Dev.
		PNW	Western NA	NA	Global		
Input	feedstock lumber - Glulam	2	4	4	1	5	5
Input	feedstock lumber - CLT	3	5	5	2	5	5
Input	adhesives			4	1	2	3
Input	coatings	3	4	5	5	3	5
Input	equipment			2	5	2	1
Value Add	3D fabrication modeling	3	3	3	3	4	5
Value Add	CNC machining	5	2	1		5	5
Core	manufacturing	3	4	3		5	5
Service	architecture	4	5	3	2	5	5
Service	timber engineering	3	5	2	1	5	5
Service	installation services	4	3	1		5	5
Education	technical design workforce development	2	3	1		5	5
Education	technical labor workforce development	3	2			5	5
Research	fire testing		2	5		2	3
Research	acoustic testing	2	2			3	3
Research	seismic testing		4	1		2	3

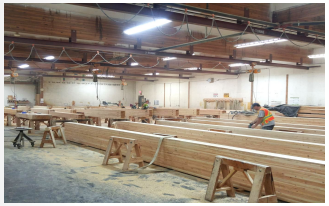
Note: Range of 1-5, 1 being low and 5 being high

Demand, Production, and Capacity



Demand

Mass timber consumed within a given region. Project-based supply only; does not included commodity glulam or panels. Expressed as volume of material and area of mass timber structure.

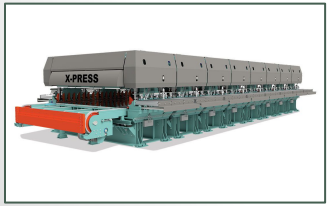


Production Estimate

The total mass timber volume produced by facilities in a given region, for use in mass timber projects in *any* region. Does not include commodity material.

Effective Capacity

Derived from theoretical capacity, effective capacity is assumed to be a more accurate reflection of capacity - representing 90% maximum production flow on a two-shift basis (60% of Theoretical Capacity).



Theoretical Capacity

Maximum capacity reflective of a fully loaded press operating three-shifts. Generously assumes the press is the bottleneck, which is often not the case.

Mass Timber Demand

Project Data Sources

WOODWORKS INNOVATION NETWORK

+

Manufacturer Websites

+

Government of Canada

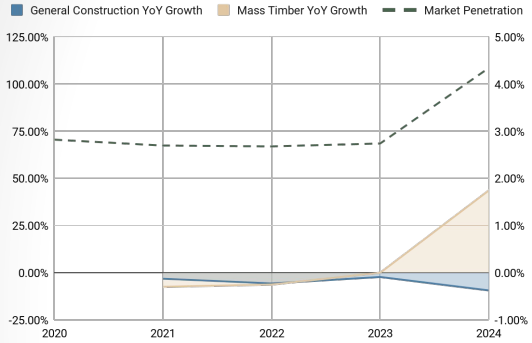
+

News Release and Internet Research

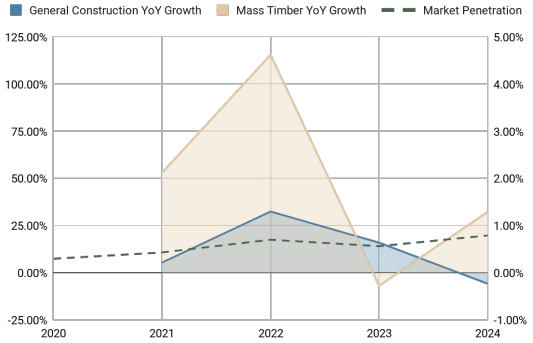
Over 1150 projects in Database

Historical Mass Timber Demand (PNW)

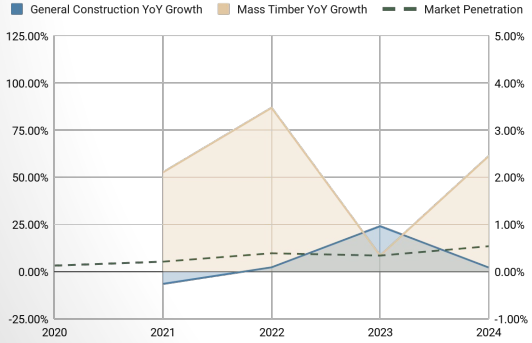
PNW: GDP = 3.8%, CAGR = 5.67%



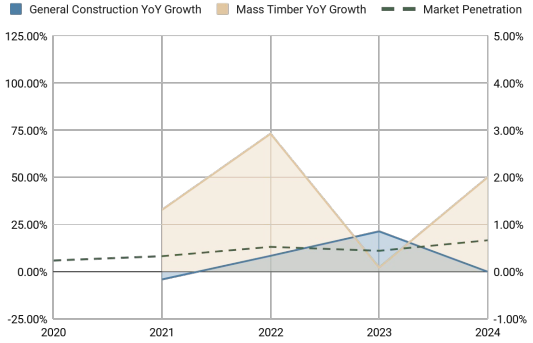
Western NA: GDP = 22.44%, CAGR = GDP = 22.44%



Eastern NA: GDP = 73.76%. CAGR = 73.76%



Total NA: CAGR = 37.08%



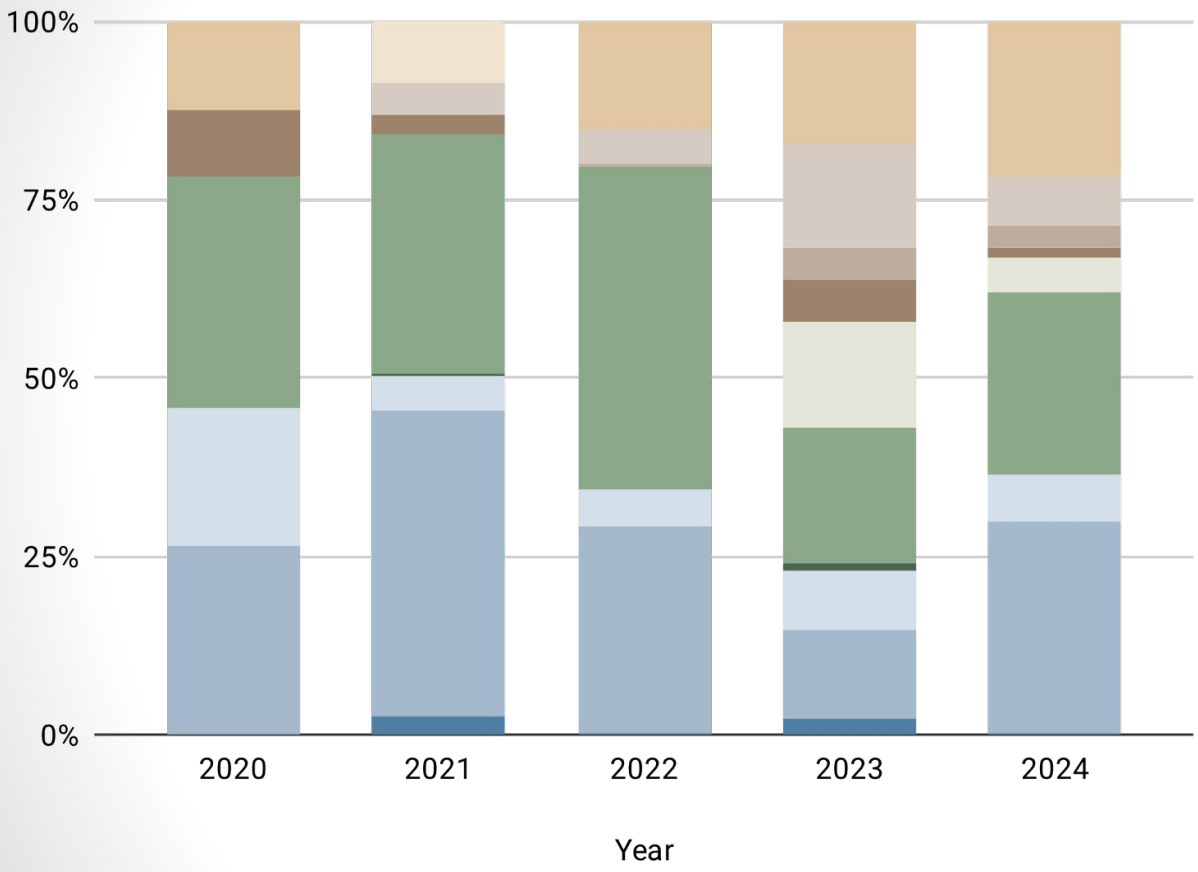
PNW
General Construction CAGR: -5.11%
Mass Timber CAGR: 5.67%
Market Penetration: 3.06%
Market Penetration Growth: 11.37%

Western NA
General Construction CAGR: 11.15%
Mass Timber CAGR: 41.95%
Market Penetration: 0.53%
Market Penetration Growth: 27.71%

Eastern NA
General Construction CAGR: 5.05%
Mass Timber CAGR: 49.56%
Market Penetration: 0.33%
Market Penetration Growth: 42.37%

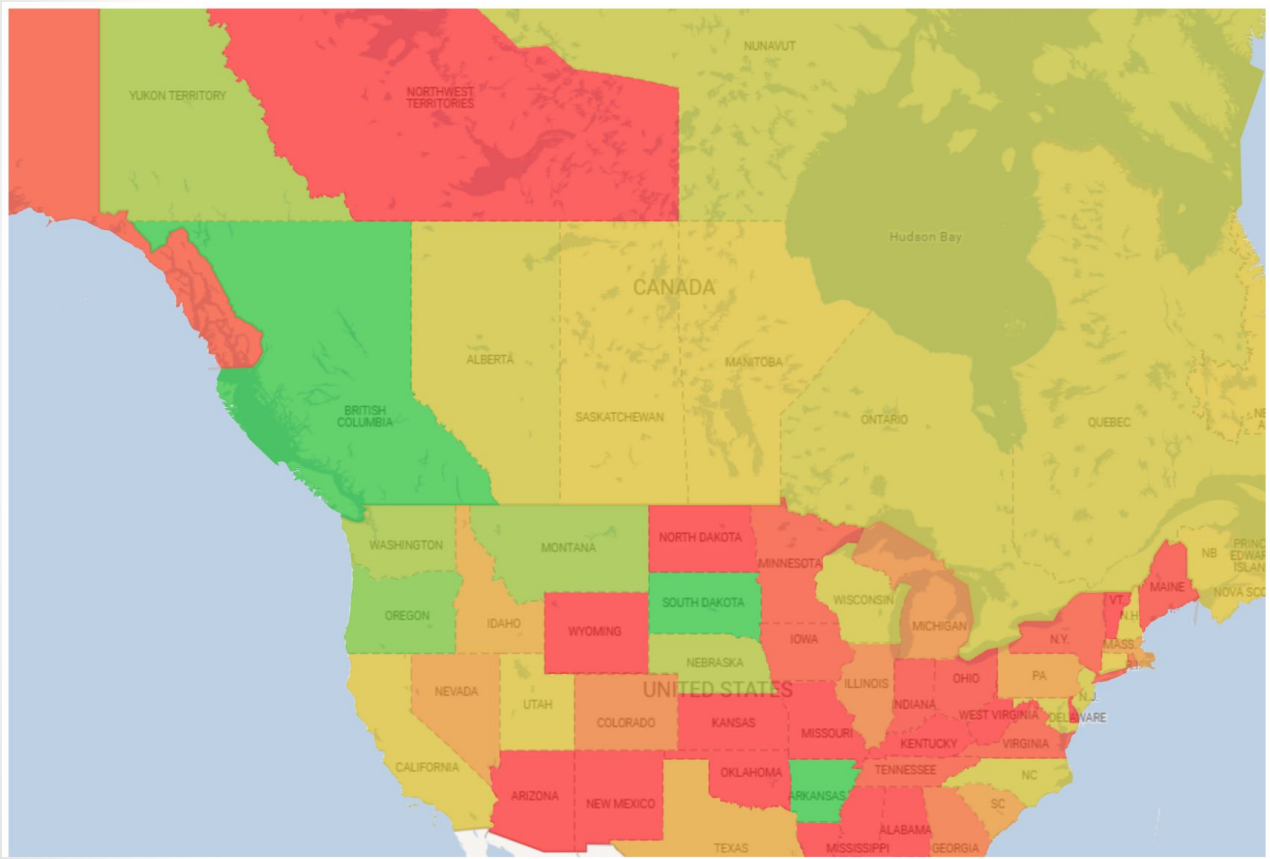
North America Total
General Construction CAGR: 6.06%
Mass Timber CAGR: 37.03%
Market Penetration: 0.44%
Market Penetration Growth: 29.21%

PNW Mass Timber Project Types



- Student Housing
- Multi-Family (Apartments, Condos, etc.)
- Mixed-Use
- Institutional
- Government
- Factory/Industrial (warehouse, storage, parking,
- Educational
- Custom Innovative Residential
- Civic (Recreational)
- Business (Office)
- Assembly (Worship, Restaurant, Theater, etc.)

2024 Mass Timber Adoption Ratio Heatmap



State/ Prov	Average of m3/ person
AR	0.0366
SD	0.0147
BC	0.0107
OR	0.0063
MT	0.0046
WA	0.0042
YT	0.0042
NE	0.0034
NU	0.0024
AB	0.0019
NJ	0.0019
ON	0.0019
NC	0.0018
QC	0.0018
WI	0.0018
MD	0.0017
CA	0.0013
UT	0.0013
NB	0.0012
NH	0.0012
DC	0.0011
MB	0.0011
NL	0.0011
NS	0.0011
PEI	0.0011
SK	0.0011
CT	0.0010
ID	0.0008
TX	0.0008
MA	0.0007

Adoption Ratio = Annual Volume of mass timber per capita

PNW Demand Projections

PNW Project Mass Timber Demand - Volume (m3)												
CAGR	**2024**	**2025**	**2026**	**2027**	**2028**	**2029**	**2030**	**2031**	**2032**	**2033**	**2034**	**2035**
15%	60,500	70,000	81,000	93,000	107,000	123,000	141,000	162,000	186,000	214,000	246,000	283,000
20%	60,500	73,000	88,000	106,000	127,000	152,000	182,000	218,000	262,000	314,000	377,000	452,000
25%	60,500	76,000	95,000	119,000	149,000	186,000	233,000	291,000	364,000	455,000	569,000	711,000
30%	60,500	79,000	103,000	134,000	174,000	226,000	294,000	382,000	497,000	646,000	840,000	1,092,000
35%	60,500	82,000	111,000	150,000	203,000	274,000	370,000	500,000	675,000	911,000	1,230,000	1,661,000
40%	60,500	85,000	119,000	167,000	234,000	328,000	459,000	643,000	900,000	1,260,000	1,764,000	2,470,000

PNW Project Mass Timber Demand ($ millions)												
CAGR	**2024**	**2025**	**2026**	**2027**	**2028**	**2029**	**2030**	**2031**	**2032**	**2033**	**2034**	**2035**
15%	$118	$136	$161	$188	$221	$259	$303	$355	$416	$488	$572	$671
20%	$118	$142	$175	$214	$262	$320	$391	$478	$585	$716	$876	$1,072
25%	$118	$148	$188	$241	$308	$392	$500	$637	$813	$1,037	$1,323	$1,686
30%	$118	$154	$204	$271	$359	$476	$631	$837	$1,110	$1,472	$1,953	$2,589
35%	$118	$159	$220	$304	$419	$577	$795	$1,095	$1,508	$2,076	$2,859	$3,938
40%	$118	$165	$236	$338	$483	$691	$986	$1,408	$2,011	$2,871	$4,100	$5,856
$/m3 AVG.	*$1,945*	*$1,945*	*$1,984*	*$2,024*	*$2,064*	*$2,105*	*$2,147*	*$2,190*	*$2,234*	*$2,279*	*$2,324*	*$2,371*

NA Demand Projections

North American Mass Timber Demand - Volume (m3)												
CAGR	**2024**	**2025**	**2026**	**2027**	**2028**	**2029**	**2030**	**2031**	**2032**	**2033**	**2034**	**2035**
15%	517,000	594,550	683,733	786,292	904,236	1,039,872	1,195,852	1,375,230	1,581,515	1,818,742	2,091,553	2,405,286
20%	517,000	620,400	744,480	893,376	1,072,051	1,286,461	1,543,754	1,852,504	2,223,005	2,667,606	3,201,128	3,841,353
25%	517,000	646,250	807,813	1,009,766	1,262,207	1,577,759	1,972,198	2,465,248	3,081,560	3,851,950	4,814,938	6,018,672
30%	517,000	672,100	873,730	1,135,849	1,476,604	1,919,585	2,495,460	3,244,098	4,217,328	5,482,526	7,127,284	9,265,469
35%	517,000	697,950	942,233	1,272,014	1,717,219	2,318,245	3,129,631	4,225,002	5,703,753	7,700,066	10,395,089	14,033,371
40%	517,000	723,800	1,013,320	1,418,648	1,986,107	2,780,550	3,892,770	5,449,878	7,629,829	10,681,761	14,954,466	20,936,252

North American Mass Timber Demand - Value (Million $)												
CAGR	**2024**	**2025**	**2026**	**2027**	**2028**	**2029**	**2030**	**2031**	**2032**	**2033**	**2034**	**2035**
15%	$1,006	$1,156	$1,330	$1,529	$1,759	$2,023	$2,326	$2,675	$3,076	$3,537	$4,068	$4,678
20%	$1,006	$1,207	$1,448	$1,738	$2,085	$2,502	$3,003	$3,603	$4,324	$5,188	$6,226	$7,471
25%	$1,006	$1,257	$1,571	$1,964	$2,455	$3,069	$3,836	$4,795	$5,994	$7,492	$9,365	$11,706
30%	$1,006	$1,307	$1,699	$2,209	$2,872	$3,734	$4,854	$6,310	$8,203	$10,664	$13,863	$18,021
35%	$1,006	$1,358	$1,833	$2,474	$3,340	$4,509	$6,087	$8,218	$11,094	$14,977	$20,218	$27,295
40%	$1,006	$1,408	$1,971	$2,759	$3,863	$5,408	$7,571	$10,600	$14,840	$20,776	$29,086	$40,721
$/m3 Avg.	*$1,945*	*$1,945*	*$1,984*	*$2,024*	*$2,064*	*$2,105*	*$2,147*	*$2,190*	*$2,234*	*$2,279*	*$2,324*	*$2,371*

Key Takeaways: Demand

- In 2024, ~60,500 m3 of mass timber went into buildings in the PNW.
    - Equivalent to 3,030,000 of mass timber project area
- Mass timber growth exceeds that of general construction in the PNW.
- Penetration rates vary across the continent but are highest in the PNW at just over 4% in 2024.
- PNW demand is currently less than half of BC's on a volume per capita basis. Still large potential to hit PNW construction market penetration of >3.5%.
- Growth across the continent is significant relative to the PNW, with the greatest increase in mass timber projects in Eastern NA.

Mass Timber Supply

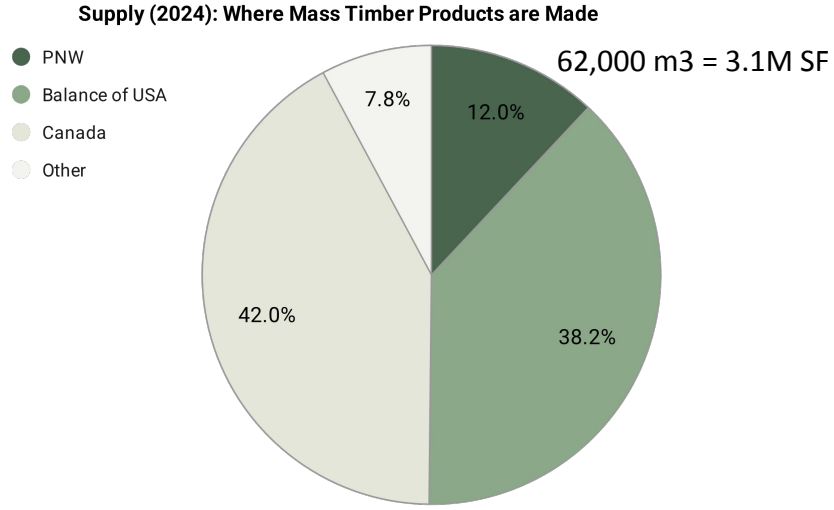
PNW Mass Timber Companies

	Company	Forest Landowner	Sawmilling & Veneer Prod.	Kiln-Drying	Beam Manuf.	Panel Manuf.	Design Assist	Timber Engineering	3D Modeling	Fabrication	Complete Structures	Procurement	Install	Volumetric Mass Timber	Architecture	Development
Commodity Mass Timber	Rosboro	Y	Y	Y	Y											
	Shelton Lam & Deck				Y											
	Western Forest Products		Y	Y	Y											
	Zip-O Laminators	Y	Y	Y	Y											
	DR Johnson	Y	Y	Y	Y				Y (limited)							
	Boise Cascade		Y	Y	In ID	Y										
Project Mass Timber	Freres	Y	Y	Y	Y	Y	Y		Y	Y	Y					
	CRTC			Y		Y (pending certification)			Y	Y (hand)			Y	Y		
	Timberlab		Y (soon)	Y	Y	Y (2027)	Y	Y	Y	Y	Y	Y (until 2027)	Y			
	Mercer			Y	In BC	Y	Y	Y	Y	Y	Y		Y			
	Vaagen Timbers			Y	Y	Y (narrow width)	Y	Y	Y	Y	Y	Y (large panels)				
Full-Service Manuf.	-															
Fabricators (Could also be Integrators)	Cascade Joinery						Y		Y	Y (hand)	Y	Y	Y			
	CutMyTimber						Y	Y	Y	Y	Y	Y				
	Sauter Timber						Y	Y	Y	Y	Y (small / complex projects)	Y (small / complex projects)				
	Cascadia Structural						Y		Y	Y	Y					
Integrators	Western Wood Structures						Y	Y	Y		Y	Y	Y			
	Carpentry Plus Inc.						Y		Y			Y	Y			
Prefab / Modular	Zaugg Mass Timber (April 2026)						Y (2026)	Y (2026)	Y (2026)	Y (2026)	Y (2026)	Y (2026)	Y (2026)	Y (2026)		
	New Energy Works						Y	Y	Y	Y	Y	Y	Y			
	Cedar Stone									Y (hand)	Y	Y	Y	Y	Y	
	Tieton Cabin Company										Y	Y	Y	Y	Y	
	Green Canopy NODE										Y	Y	Y	Y	Y	Y

- While the PNW is home to many mass timber companies, as of 2025, full-service companies are in short supply, impacting the region's manufacturing competitiveness relative to other regions, nationally and globally.

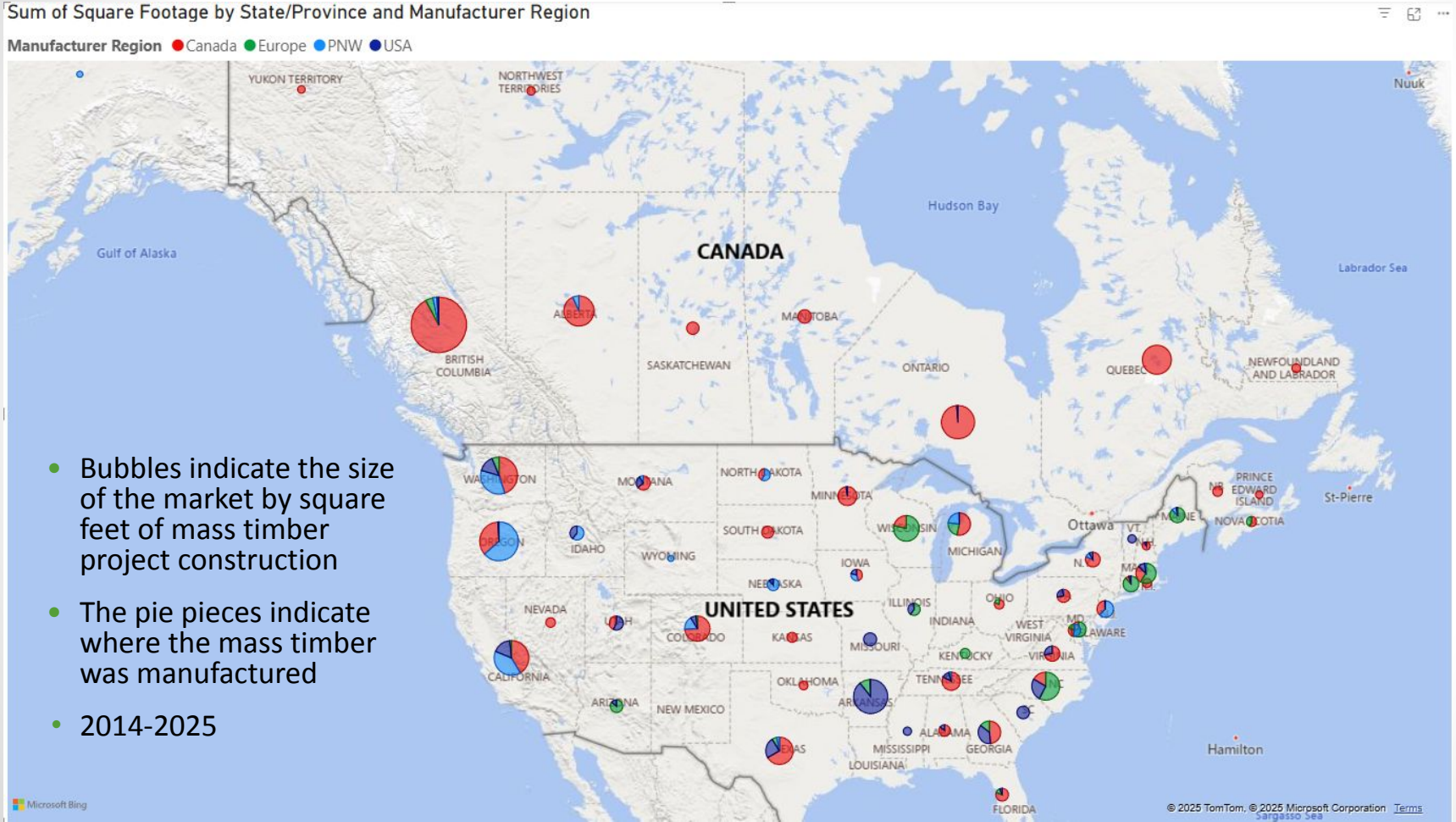
Production: PNW Manufactured Mass Timber (2024)

Geographic Region	Total Project Area of PNW Mass Timber (FT2)	Total PNW Mass Timber Volume (m3)	% of PNW Production
PNW	1,280,000	25,600	41.29%
Western NA	510,000	10,200	16.45%
Eastern NA	1,310,000	26,200	42.26%
Total PNW Mass Timber Volume in North America (2024)	**3,100,000**	**62,000**	**100.00%**



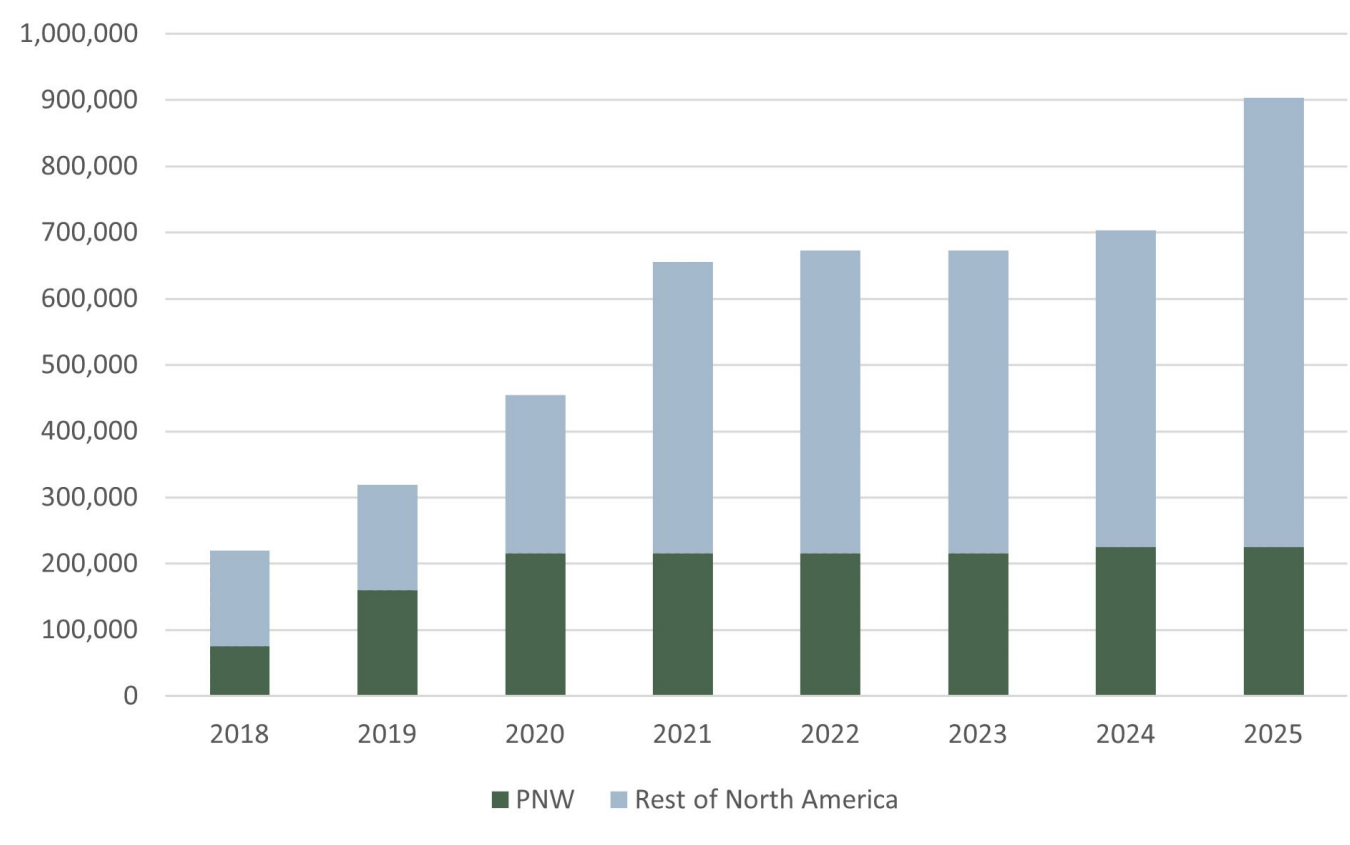
Total Demand in NA= 517,000 m3

Where is the mass timber coming from and going to?

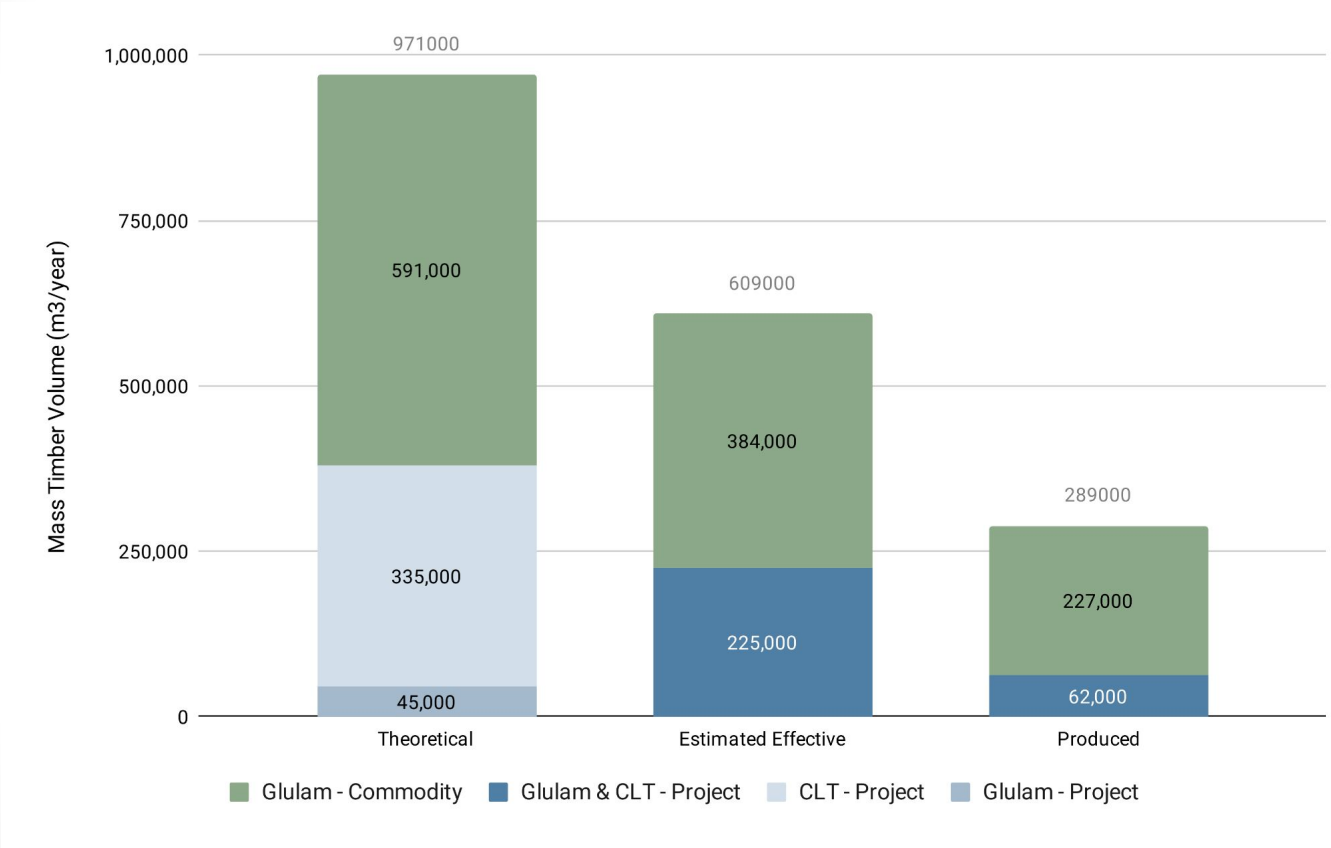


- Bubbles indicate the size of the market by square feet of mass timber project construction
- The pie pieces indicate where the mass timber was manufactured
- 2014-2025

Capacity to Produce Mass Timber



PNW Focus on Capacity (2024)



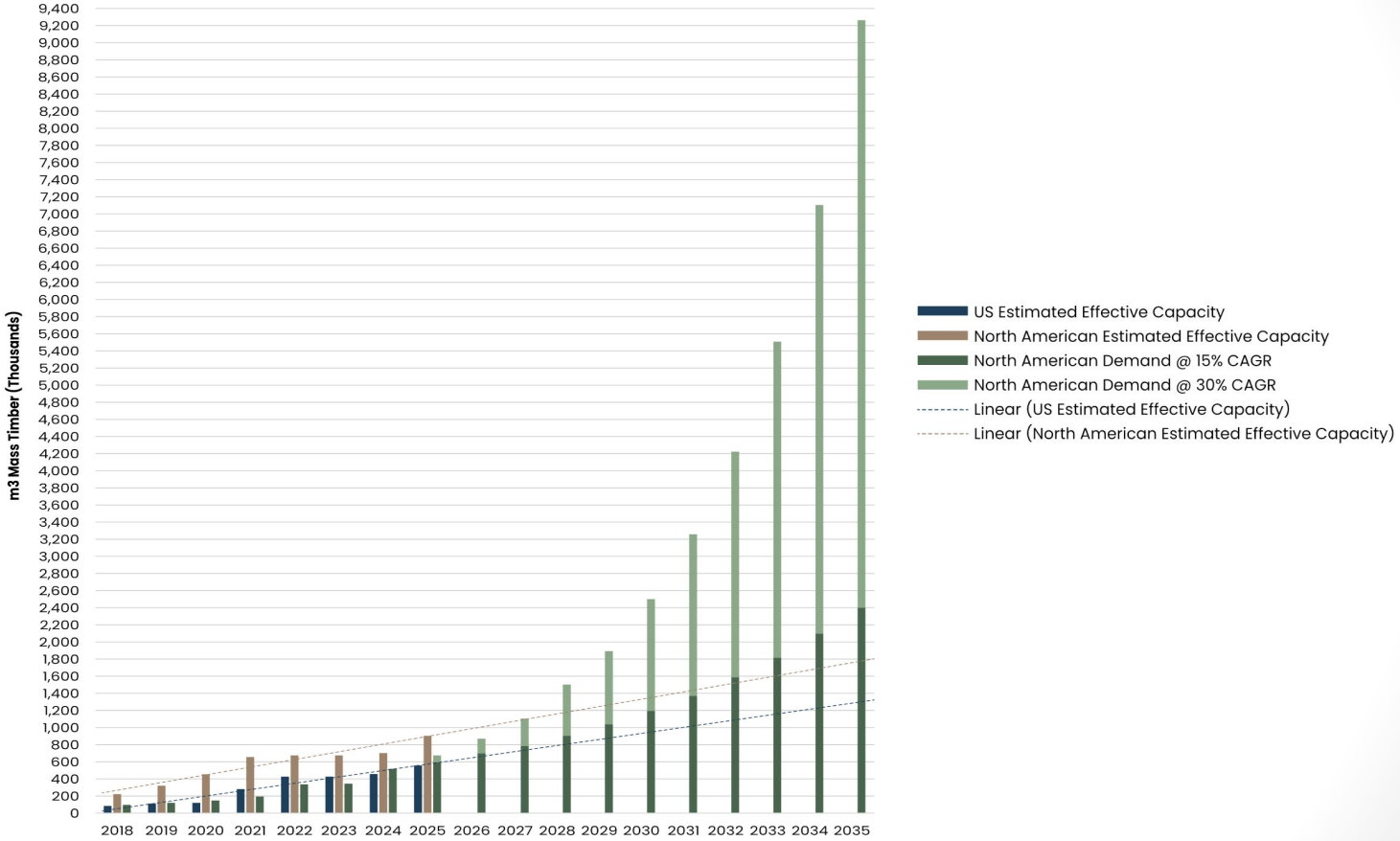
PNW Future Market Size Relative to Current PNW Capacity (2024)

PNW Project-Based Mass Timber Product Volume (m3)												
CAGR	**2024**	**2025**	**2026**	**2027**	**2028**	**2029**	**2030**	**2031**	**2032**	**2033**	**2034**	**2035**
15%	62,000	71,000	82,000	94,000	108,000	124,000	143,000	164,000	189,000	217,000	250,000	288,000
20%	62,000	74,000	89,000	107,000	128,000	154,000	185,000	222,000	266,000	319,000	383,000	460,000
25%	62,000	78,000	98,000	123,000	154,000	193,000	241,000	301,000	376,000	470,000	588,000	735,000
30%	62,000	81,000	105,000	137,000	178,000	231,000	300,000	390,000	507,000	659,000	857,000	1,114,000
35%	62,000	84,000	113,000	153,000	207,000	279,000	377,000	509,000	687,000	927,000	1,251,000	1,689,000
40%	62,000	87,000	122,000	171,000	239,000	335,000	469,000	657,000	920,000	1,288,000	1,803,000	2,524,000
Estimated Effective Capacity	**225,000**	**225,000**	**225,000**	**325,000**	**325,000**	**325,000**	**325,000**	**325,000**	**325,000**	**325,000**	**325,000**	**325,000**

Light Green: Date at which CAGR meets current capacity.

Dark Green: Date at which CAGR meets oncoming capacity.

NA Projected Capacity Needs



Pacific Northwest Mass Timber Tech Hub

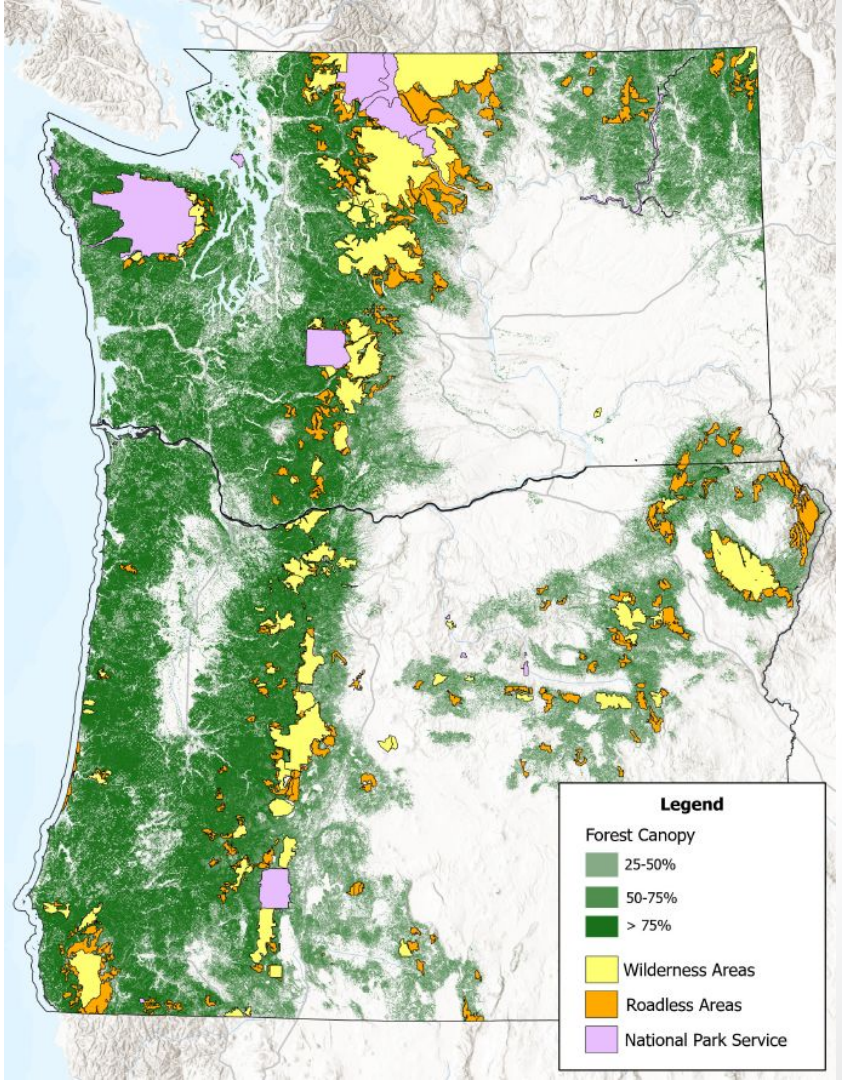
Key Takeaways: Supply

- Growing demand in the PNW could have the greatest direct impact on the pipeline for PNW manufacturers, who supply roughly half of the mass timber consumed in the region.
- In 2024, PNW manufacturers have a collective estimated effective capacity for project-based mass timber amounting to 225,000 m3. 62,000 m3 were produced (28% of that capacity). Commodity mass timber contributes another 384,000 m3 of estimated effective capacity, and 227,000 m3 of commodity mass timber products were produced.
- Roughly half of PNW mass timber project area is built with mass timber from the PNW, likely due to material supply scope requirements and cost competitiveness.
- The PNW is exporting to other North American regions—and this will increase over time.

Fiber Supply: Forests, Logs, Lumber

Forests: Area, Ownership, Standing Volume, & Log Availability

- **Area:** 41 million acres of *Timberland* in OR & WA
- **Ownership:** Key categories
  - 56% public (state, federal, local)
  - 43% private (industrial, tribal, non-industrial)
- **Standing Volume:** 700 billion board feet (Scribner)
- **Harvest:** 6.3 billion board feet (Scribner/year), or a little less than 1% of standing volume
- **Log Availability:** ~75% of harvest is from private lands; Public harvest is gated by policy more than biology



Logs:
Growth to Drain

- **Growth:** The wood fiber volume added each year by new growth
- **Drain:** The wood fiber volume lost each year by: 1) natural mortality (insects, disease, fire, etc.) and 2) harvest
- **Growth to Drain (G:D) Ratio:**
  - > 1 adding volume over time
  - = 1 stable volume
  - < 1 declining volume over time

Logs: Growth to Drain

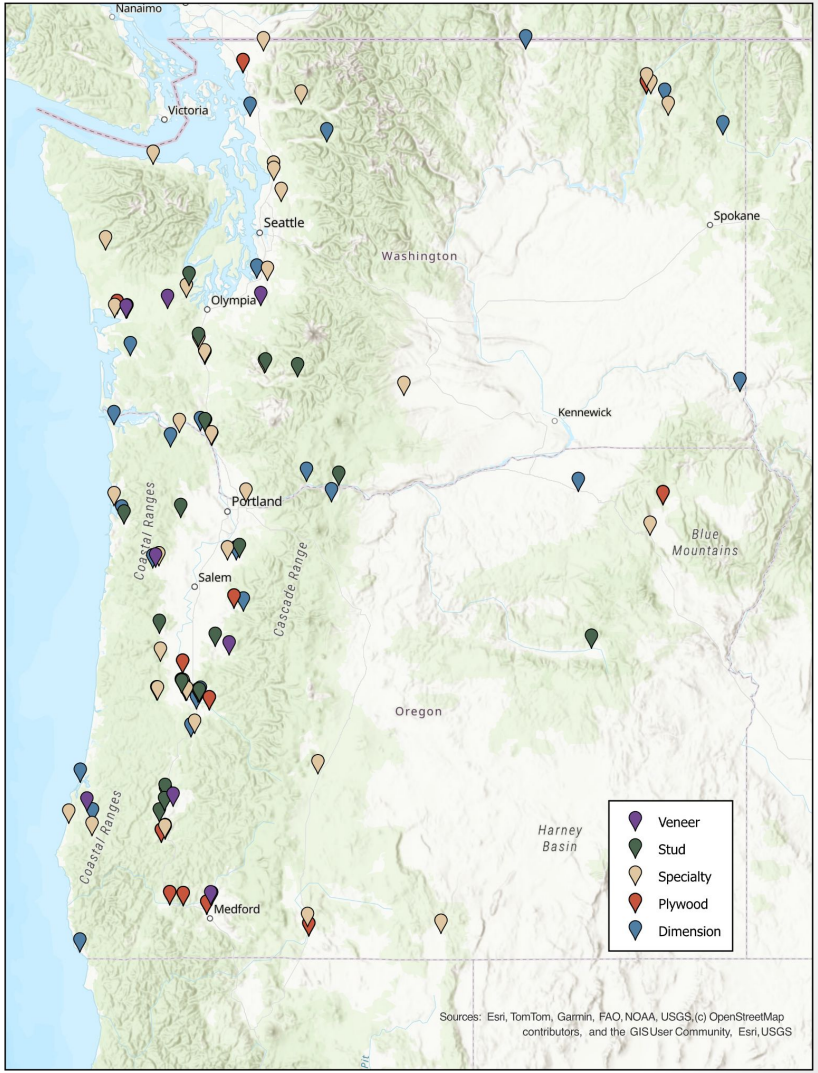
Metric	Units	USFS	Other Fed	State & Local	Private	Total
Oregon						
Area	Million acres	11.14	2.37	1.11	9.23	23.85
Growth	Million FT3/year	537	243	118	930	1,827
Mortality	Million FT3/year	374	85	28	122	609
Drain	Million FT3/year	178	48	78	916	1,220
G to D	Ratio	3.01	5.03	1.51	1.02	1.5
M to D	Ratio	2.1	1.75	0.36	0.13	0.5
Washington						
Area	Million acres	5.7	0.15	2.78	9.04	17.67
Growth	Million FT3/year	250	15	268	826	1359
Mortality	Million FT3/year	309	6	122	206	643
Drain	Million FT3/year	74	15	270	753	1112
G to D	Ratio	3.37	0.99	0.99	1.1	1.22
M to D	Ratio	4.18	0.43	0.45	0.27	0.58

Legend for Shading of Cells in Preceding Table:
Growth-to-Drain (G/D) Ratio
- **≥ 3.0 – Dark Green:** Very high growth relative to removals (underutilized, potential for increased harvest)
- **2.0 – 2.99 – Medium Green:** Strong growth surplus
- **1.2 – 1.99 – Light Green:** Moderate growth surplus
- **0.8 – 1.19 – Light Orange:** Near balance (growth ≈ removals)
- **< 0.8 – Red:** Growth deficit (overcutting or declining productivity)

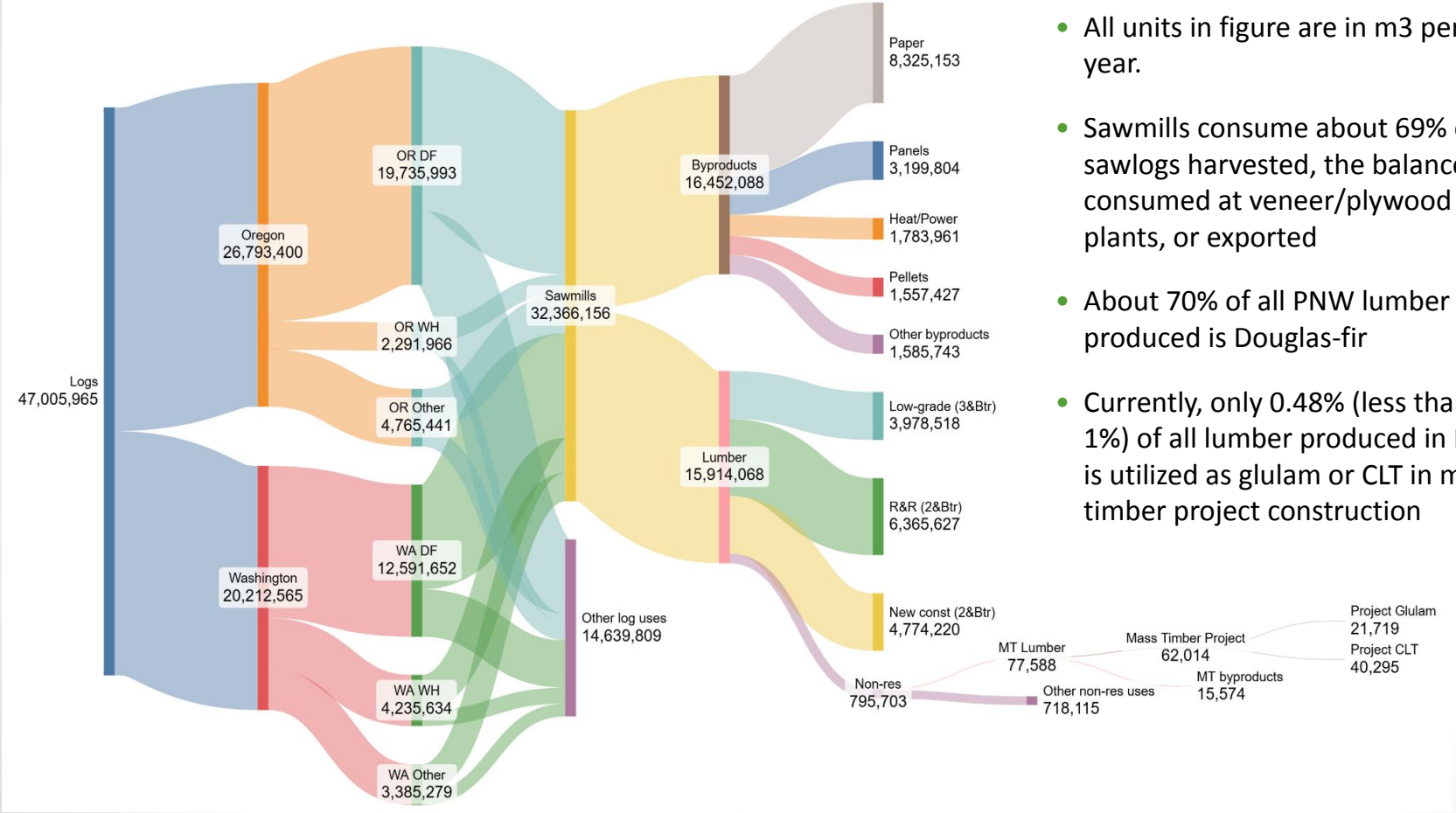
Mortality-to-Drain (M/D) Ratio
- **≥ 2.0 – Dark Red:** Mortality more than double removals (significant forest health concerns)
- **1.0 – 1.99 – Orange:** Mortality approaching or exceeding removals
- **0.5 – 0.99 – Yellow:** Moderate mortality relative to removals
- **< 0.5 – Light Green:** Low mortality pressure

Lumber

- **Mills:** 114 sawmills operating in OR and WA
- **Capacity:** 11.7 billion board feet/year
- **Production:** 8.7 billion board feet in 2024
- **Well Suited:** width, thickness, grade, species filters total annual lumber production in OR & WA down to a well suited volume of about 2.8 billion board feet
- **Further Constraints:** Extra kiln drying requirements and extra quality requirements for lamstock further reduce practical availability



Mass Timber's Share of Log Utilization



- All units in figure are in m3 per year.
- Sawmills consume about 69% of all sawlogs harvested, the balance is consumed at veneer/plywood plants, or exported
- About 70% of all PNW lumber produced is Douglas-fir
- Currently, only 0.48% (less than 1%) of all lumber produced in PNW is utilized as glulam or CLT in mass timber project construction

Lumber Utilization in PNW Mass Timber

Cubic Volume of Mass Timber Product Demand (m3/Year)	MBM of lumber needed per year	Lumber Volume Needed as a % of Well-Suited Lumber Supply	Lumber Volume Needed as a % of All NA Softwood Lumber Production
25,000	18,000	0.09%	0.03%
50,000	36,000	0.19%	0.06%
75,000	54,000	0.28%	0.09%
100,000	72,000	0.38%	0.13%
200,000	145,000	0.76%	0.25%
300,000	217,000	1.14%	0.38%
400,000	290,000	1.53%	0.51%
500,000	362,000	1.91%	0.64%
1,000,000	724,000	3.81%	1.27%
1,500,000	1,086,000	5.72%	1.91%
2,000,000	1,448,000	7.62%	2.54%
2,500,000	1,810,000	9.53%	3.18%
3,000,000	2,172,000	11.43%	3.81%
3,500,000	2,534,000	13.34%	4.45%
4,000,000	2,896,000	15.24%	5.08%
4,500,000	3,258,000	17.15%	5.72%
5,000,000	3,620,000	19.05%	6.35%

2024 PNW

2035 PNW

2035 NA

Key Takeaways: Fiber

- Timber and lumber supply are not a near-term constraint.
- Limited lamstock availability impacts cost competitiveness of feedstock material for mass timber.
- Mass timber manufacturers should seek long-term supply agreements with sawmills willing to produce lumber meeting the special needs of CLT and glulam manufacturing.

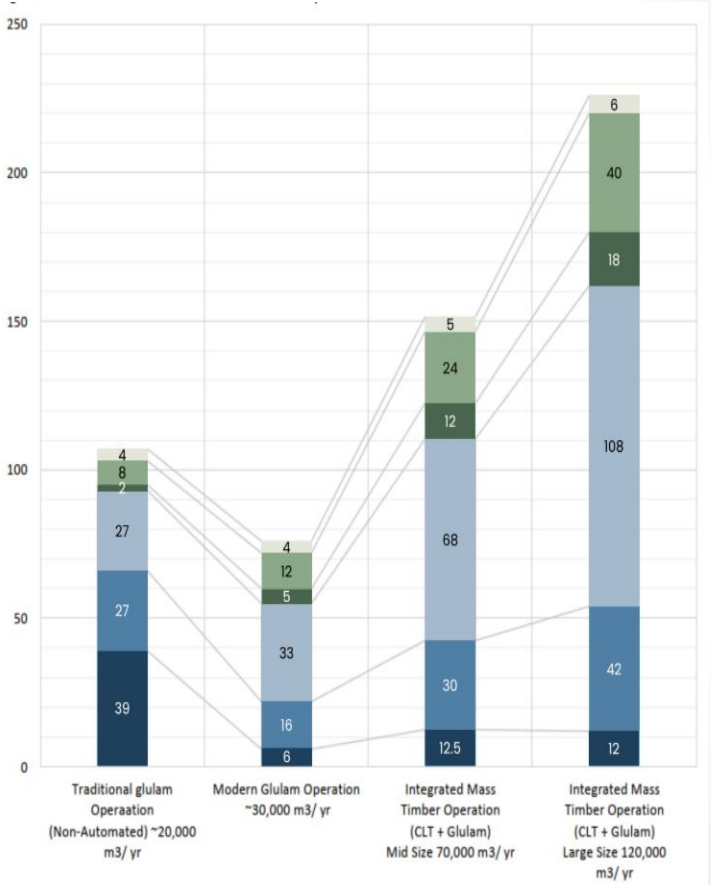
Economic Impact

Economic Impact of the Mass Timber Industry

Revenue Center	Physical Basis (2024)	Units	Unit Price USD	Gross Revenue USD M	Key Components
Logs Delivered to Mill	5,650,352	FT3 logs	$3.96	$22,399,973	Stumpage; felling; in-woods processing; trucking
Rough-Sawn Lumber (KD-S4S)	46	MMBM	$720	$33,120,000	Sawing; drying; planing (mill-net ex-yard)
Steel Connections		% of MT pkg.	15%	$18,088,500	
Hardware Fasteners		% of MT pkg.	8%	$9,647,200	
Fabricator Side Engineering Services		% of MT pkg.	5%	$6,029,500	
Mass-Timber Components	62,000	m3	$1,945	$120,590,000	CLT & GLT manufacture; finger-jointing; trimming
On-Site Installation	3,129,515	SQFT of building	30%	$36,177,000	Crane rental; erection crews; temporary works; site management
Completed MT Super-Structure	3,129,515	SQFT of building	8.50%	$425,611,765	Sum of Delivered Package + Installation (GC line-item)
General Contractor Services		% of building	10%	$42,561,176	
Architectural Services		% of building	7%	$29,792,824	
Engineering Services		% of building	3%	$12,768,353	
Total				**$756,786,291**	

Economic Impact of Mass Timber: Job Creation

Company Type	Total Office (Admin) Employees in OR/WA	Sales, Marketing, Estimating	Engineering, Modeling	Project Mgmt. in OR/WA	Production Staff per Shift per Facility	Total Staff in OR/WA
Commodity Glulam	1-5	1-5	0-5	0-5	50-75	Need data
Custom Glulam	5-10	1-5	0-5	0-5	15-25	25-75
Mass timber manufacturer (small)	5-10	1-5	5-10	0-5	25-50	25-50
Mass timber manufacturer (large)	25-50	5-15	1-10	5-15	25-75	50-150
Fabricator	3-15	1-5	1-5	1-5	3-10	5-20
Integrator	10-20	1-5	5-10	1-5	15-20 (install)	25-50
Prefab Modular	3-5	1-3	0	1-3	3-5	5-10



Economic Impact of Mass Timber: Job Creation

Category	Jobs per 100,000 m³	Jobs @ 62,000 m³
Installation (erection)	76	47
Architectural services – incremental to MT	42	26
Engineer of Record – incremental	24	15
Contractor services (GC field staff)	11	7
Support services (insurance, safety, testing)	6	4
Steel component supply – shop fabrication only	46	29
Forestry & lumber supply (harvest, haul, sawmilling)	505	313
Induced subtotal (ex-factory)	**710**	**441**
Manufacturing Organization (factory)	**362**	**224**
Grand total (incl. factory)	**1,072**	**665**

- At current PNW Capacity
  - 665 Direct Jobs (estimated)
  - 441 Induced Jobs (estimated)
  - 224 Factory Jobs (estimated)
  - Estimated direct payroll of ~$60 million/year
  - Estimated tax capture rate of $6 million/year in state/local revenue

Economic Impact of Mass Timber: Rural Communities

Town	Population (2024)	Mass Timber Company	Investment
Neah Bay, Makah Reservation	935	Makah Sawmill	$2.7M investment to build sawmill in 2024
Drain, OR	1,198	Timberlab	Timberlab acquires glulam manufacturer American Laminators in 2024
Estacada, OR (including Eagle Creek)	5,591	Carpentry Plus Inc CutMyTimber Sauter Timber	$1.2M by CutMyTimber to build out 14,000 SF fabrication facility in Eagle Creek, OR, 2023.
Lyons, OR	1,220	Freres Engineered Wood	Freres invests $36M in MPP manufacturing facility, completed in 2017. Freres builds 58,000 SF mass timber warehouse for plywood storage.
Millersburg, OR	3,541	Timberlab (in 2027)	Phase 1: Timberlab invests $117M to build new 185,000 SF CLT manufacturing facility. Phase 2: 85,000 SF fabrication and finishing building
Philomath, OR	5,795	Timberlab	Timberlab acquires Philomath sawmill from Interfor properties for $15M in 2024.
Riddle, OR	1,220	DR Johnson	Glulam production
Swisshome, OR	338	Timberlab	Timberlab acquires glulam manufacturer American Laminators in 2024
Colville, WA	5,009	Vaagen Timbers	Glulam/CLT production
Port Angeles, WA	20,112	CRTC	Building Innovation Center (Kiln-drying, CLT production)
Tieton, WA	1,610	Tieton Cabin Company	Modular mass timber housing production
Totals	**46,569**	**~ 520 jobs**	

Key Takeaways: Economic

- Mass timber projects contribute $756 million to the PNW economy, or 0.08% of total GDP.
- There are over 20 mass timber companies in the PNW, with manufacturers generating annual revenues on the order of $20-100M, and value-add companies on the order of $1-10M.
- Project-based mass timber manufacturing contributes and increased Economic value added (EVA) of $120M to the regional economy.
- Multi-billion-dollar investments are needed in regional manufacturing if the PNW is to remain a leader.

CAGR	2024 Demand (m3)	2024 Capacity (m3)	2035 Demand (m3)	Capacity Delta (2024-2035) (m3)	Investment Required @ $1800/m3
15%	517,000	718,000	2,405,000	1,687,000	$3.0 billion
30%	517,000	718,000	9,265,000	8,547,000	$15.3 billion

Call to Action

- Fiber Supply:
  - **Optimize availability of lamstock** to manufacture mass timber products, to reduce cost of feedstock and end product.
- Production Capacity:
  - **Investment needed.** To meet projected growth trajectories, large volume investment is needed in stabilized business delivery models to support continued growth trajectory.
- Market Demand:
  - **Encourage policies that support mass timber.** Zoning incentives, low-carbon legislation, and Wood First policies improve the market competitiveness of mass timber for developers.

Thank You!

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