Influencer Perceptions, Use, and Understanding of Cross-laminated Timber in the U.S. South: 2018 & 2025

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Outline

- Mass Timber & CLT
- The Study
- Final Observations

What is Mass Timber?
Includes Existing Products

Glulam Beams

Parallel Strand Lumber (PSL)

Laminated Strand Lumber (LSL)

What is Mass Timber?
Includes Existing Products

Laminated Veneer Lumber (LVL)

I-Joists

What is Mass Timber?

Dowel-Laminated Timber (DLT)

Photos: StructureCraft

Nail-Laminated Timber (NLT)

Mass Plywood Panels (MPP)

Photos: Rich Vlosky

Cross-Laminated Timber (CLT)?

Building with CLT – Off-Site Prefabrication

Photos: Rich Vlosky

CLT Construction-Roof Systems

Smartlam, 2017

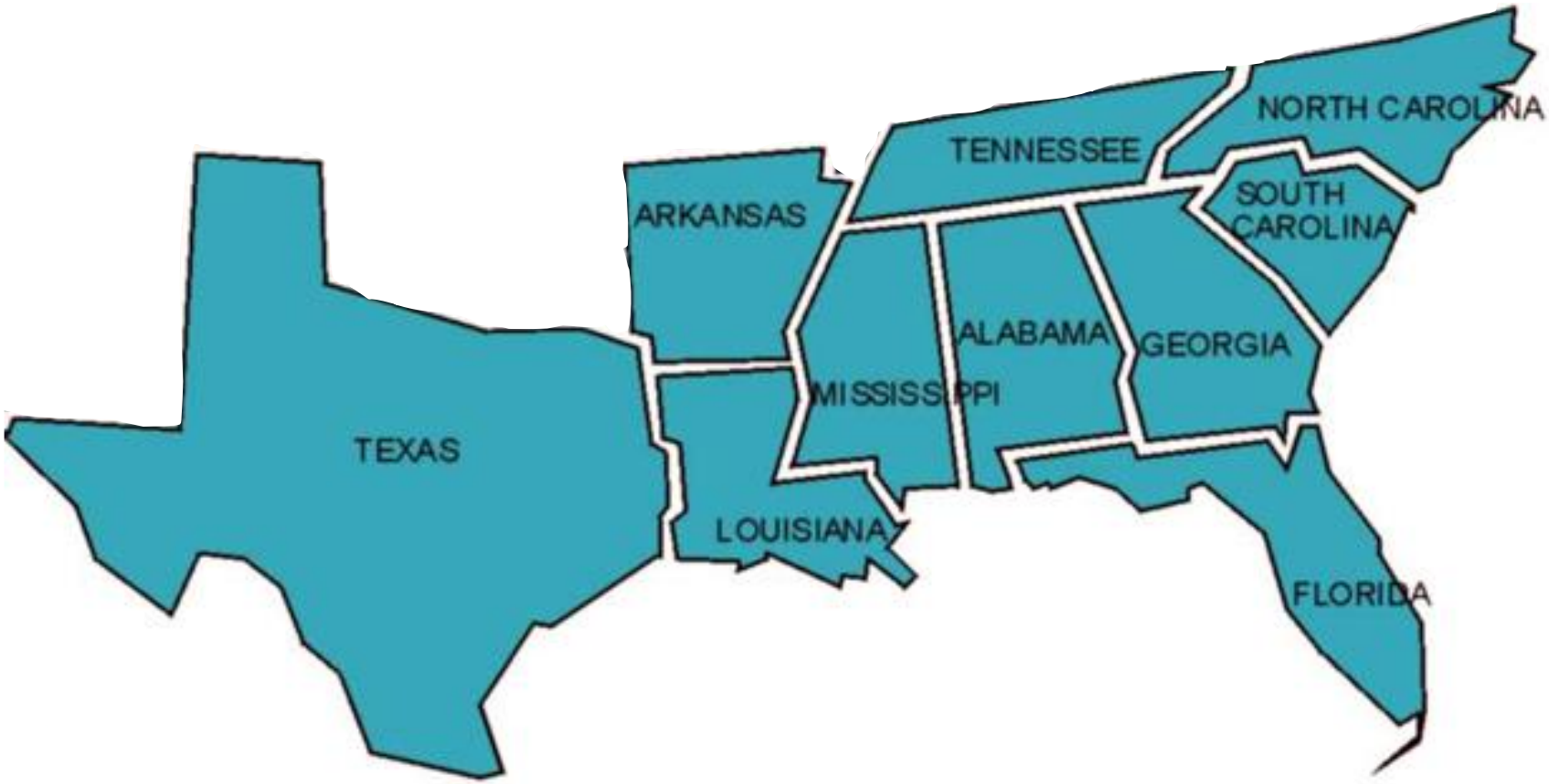
CLT Construction-Wall Systems

Smartlam, 2017

CLT Construction-Elevator Shafts

Smartlam, 2017

Study Region



Overall Methodology

- The studies were conducted in:
  - 2018 & 2025

- Paper-based survey instruments.

- Mail-based survey process:
  - Pre-notification postcard
  - 1st Mailing
  - Reminder Postcard
  - 2nd Mailing

- Identical Survey Instruments were used for both studies.

- 2018 survey recipients: Random Samples from sector populations
- 2025 survey recipients: Respondents AND Non-Respondents from 2018

The Study

Influencer and Potential Participants in the Development of Developing CLT Using Southern Yellow Pine in the US South

Combined for the Study

- Architects
- Non-Residential Builders
- Engineers (structural, civil, architectural)

Importance of the characteristics when specifying/using structural construction materials (2018: n=431; 2025: n=149

Scale: 1=not important at all; 3=neither unimportant nor important; 5=very important

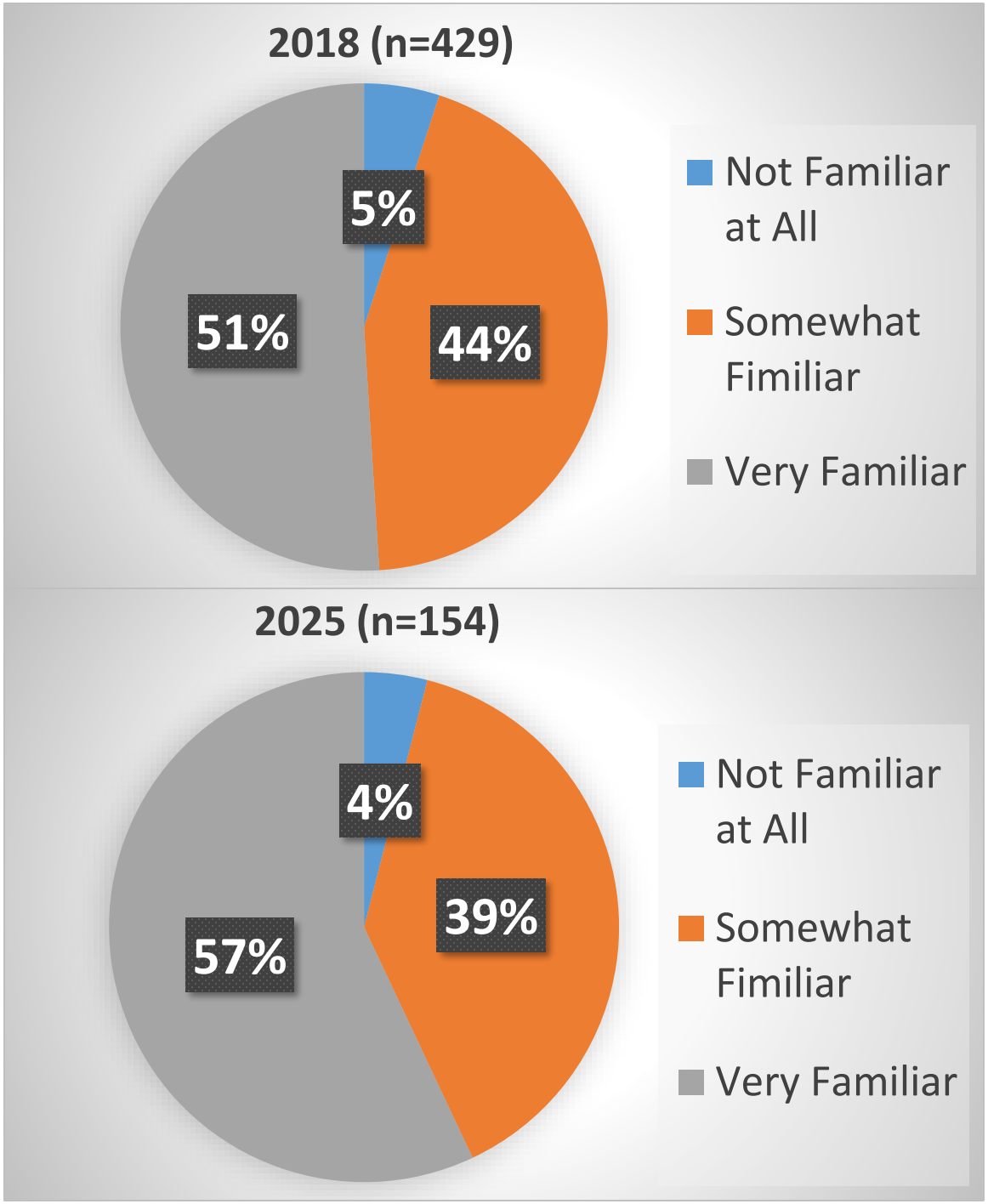
Characteristic	Mean (2018)	Mean (2025)
Structural performance	**4.9**	**4.9**
Durability over time	4.4	4.4
Economic performance	4.4	4.4
Availability in the market	4.2	4.4
Fire performance	4.1	4.2
Aesthetics	4.0	4.1
Cost of post-construction maintenance	3.8	3.8
Environmental performance	3.5	3.5
Acoustic performance	3.0	3.0
Earthquake performance	2.9	3.0
LEED credits	**2.6** ⇩	**2.2**

Percent of respondents that have specified/used the following STRUCTURAL wood products in the past year (2018: n=429; 2025: n=152)

		2018	2025
Structural plywood	⇧	**78%**	**79%**
Oriented strandboard	⇩	**78%**	**72%**
Wood I-Joist	⇧	70%	75%
Glue-laminated (glulam) beams	⇩	68%	66%
Laminated veneer lumber (LVL)	⇧	68%	75%
Parallel strand lumber	⇧	29%	33%
Laminated strand lumber (LSL)	⇧	26%	32%
Structural insulated panels	⇔	23%	23%
Cross-laminated timber (CLT)	⇧	**7%**	**20%**
Mass plywood panels (MPP)	⇧	**3%**	**6%**

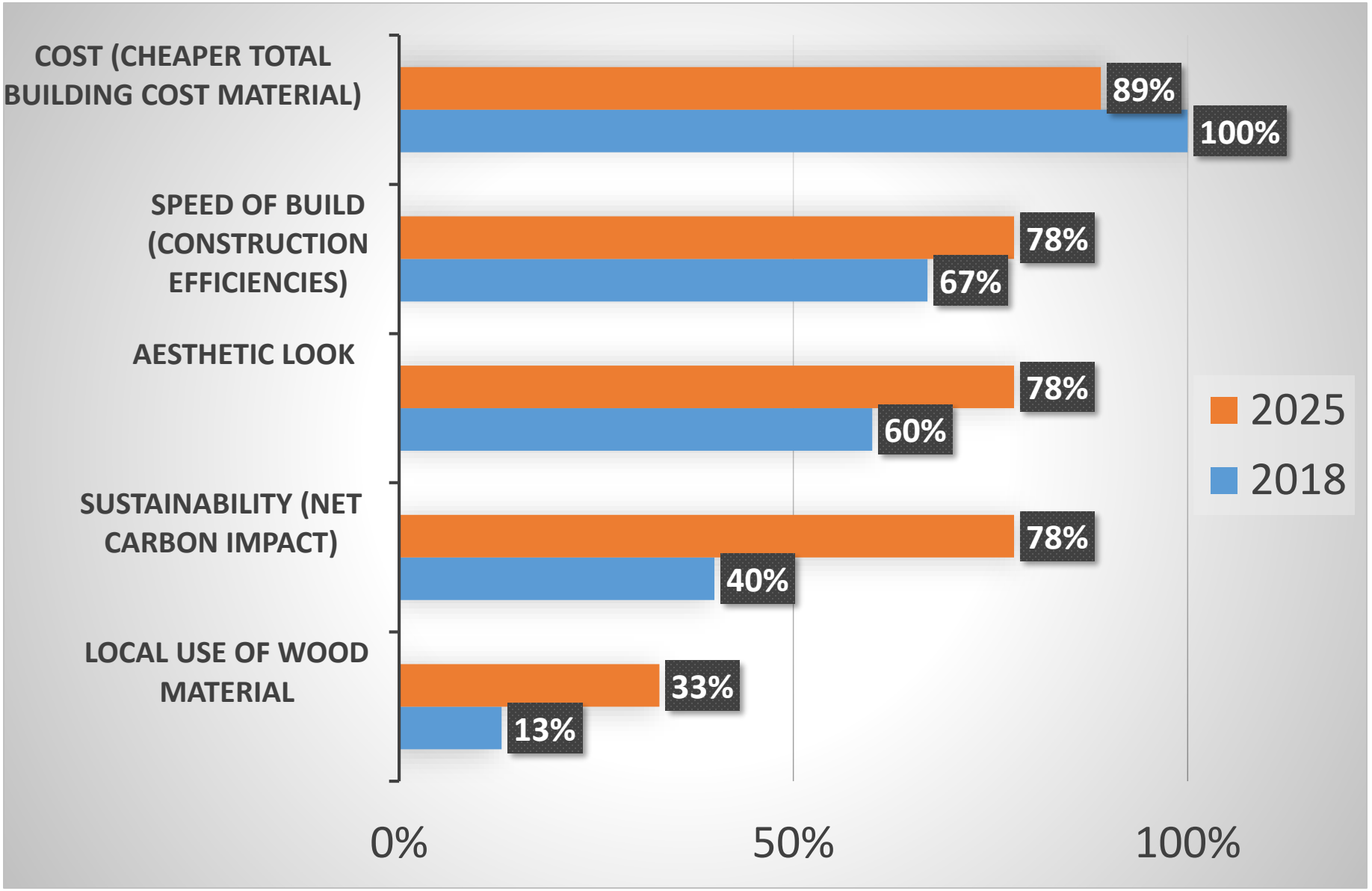
Respondent general level of familiarity / understanding of CLT

Very Familiar + 12%

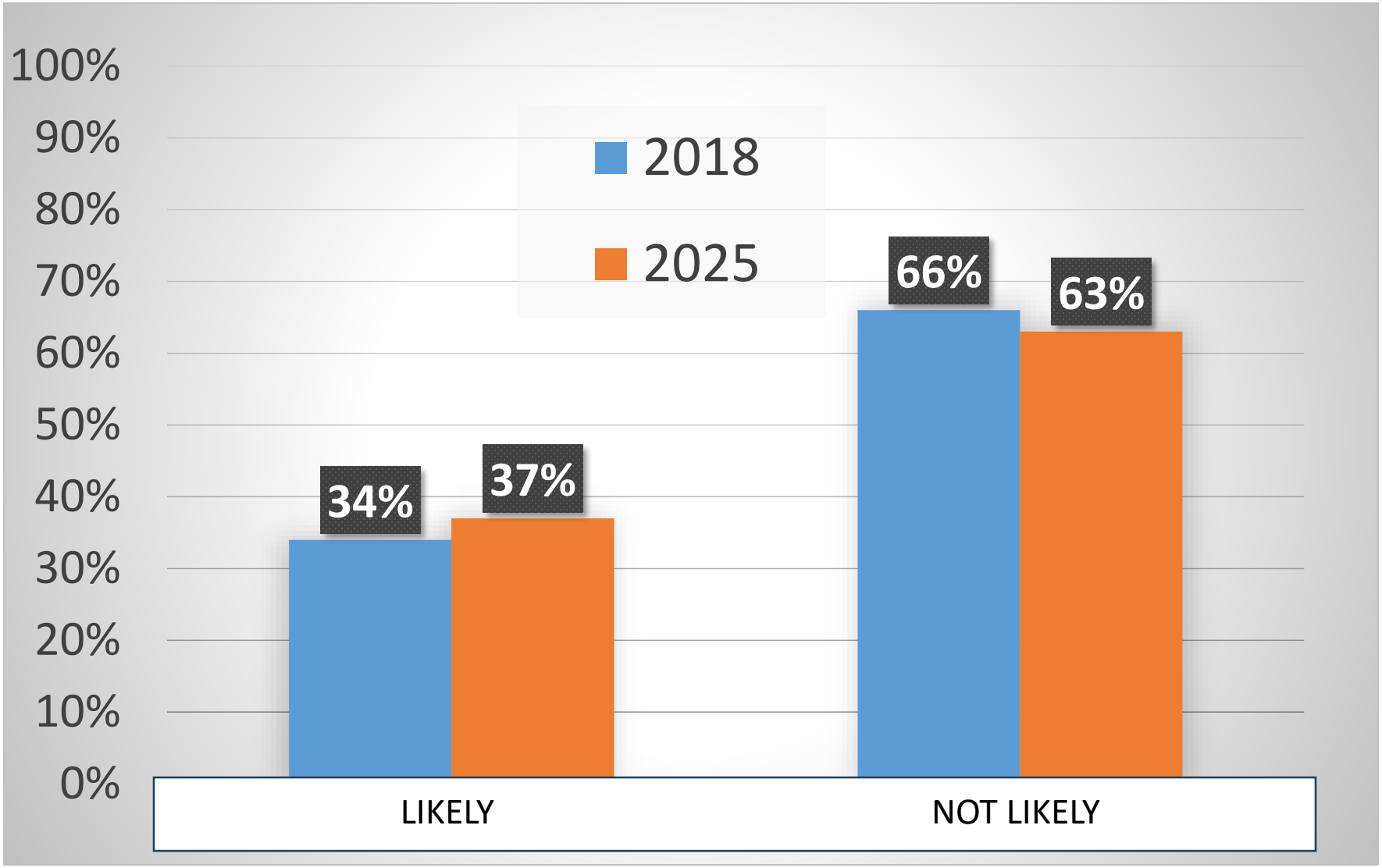


Reasons for Choosing to use CLT vs. Steel or Concrete

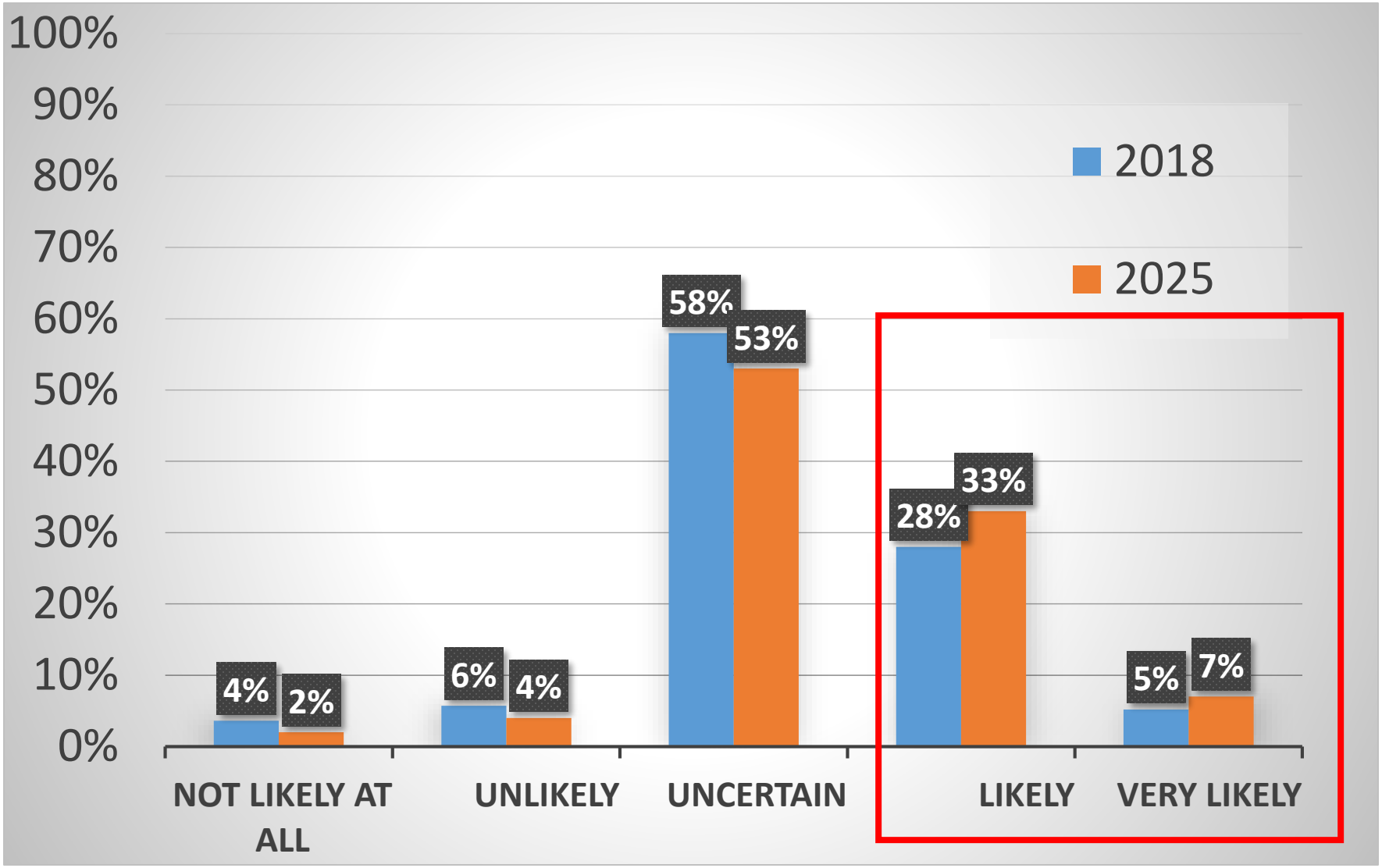
(2018: n=30; 2025: n=9) (Percent of Respondents) (Multiple Responses Possible)



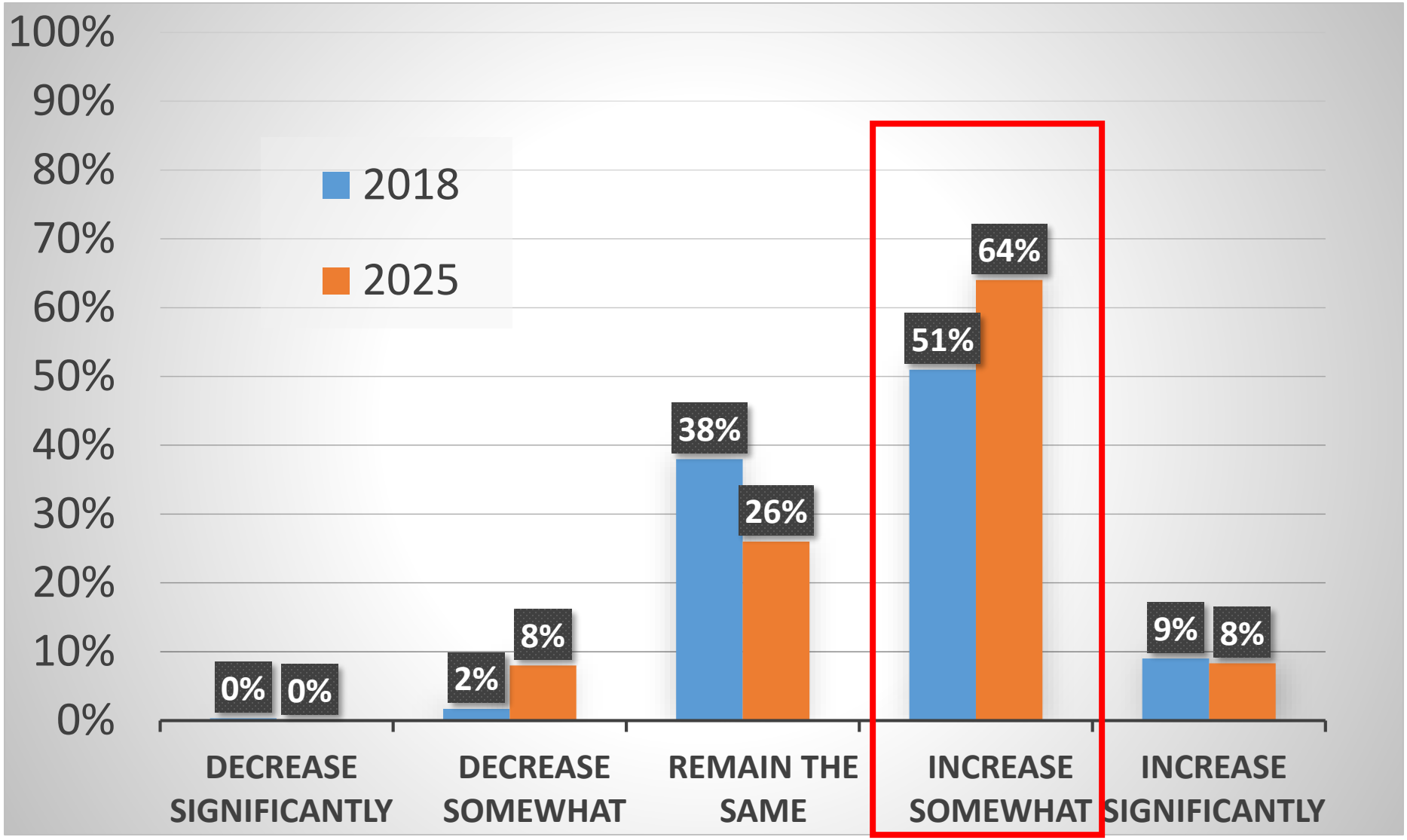
If not, how likely is it that your firm would be involved in CLT construction in the future? (2018: n=399; 2025: n=141)



If CLT was available in your region, how likely would you be to use CLT in one of your building projects? (2018: n=429; 2025:n= 152) Percent of Respondents



How do you think use of CLT in the U.S. *in general* will change in the next year? (2018: n=349; 2025:n= 132) Percent of Respondents



Limitations for CLT Adoption in the U.S. South

- Limited awareness of emerging timber technologies
- Limited legislative support from government
- Lack of experienced designers
- Lack of experienced builders
- Lack of experienced architects
- Lack of knowledge about building codes
- Lack of knowledge that suppliers exist

The Future

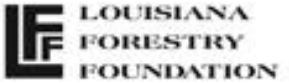
- CLT acceptance by influencers and CLT dimension lumber feedstock manufacturers is growing, albeit slowly, in the U.S. South.

- There are only two CLT manufacturers in the region.

- Keys to success: Building Awareness, Education, Active Promotion, for these and other stakeholders.

- CLT has an established presence in the Pacific Northwest, Eastern Canada. There are significant potential opportunities to grow to become a robust product/market in the U.S. South.

2018
Study Funding Sources and Partners



Harvey Family Foundation

2025
Study Funding Sources and Partners

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